Employment Land Review

Wrexham County Borough Council and Flintshire County Council

Final Report

October 2015

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EXECUTIVE SUMMARY

Introduction

i) This report assesses the supply, need and demand for employment land and premises (Use Class B) in the local authority areas of Wrexham and Flintshire. It has been carried out on behalf of Wrexham County Borough Council (WCBC) and Flintshire County Council (FCC) to provide robust evidence to underpin and inform the Council's respective Local Development Plans (LDP) to bring them in line with the updated requirements of Planning Policy Wales (PPW) and Technical Advice Note (TAN) 23. It will analyse employment land and premises demand, supply and need to 2030.

ii) The Study comprises three main elements:

- To review the existing employment land provision position, and the suitability and viability for the long term of sites and allocations for employment use in light of the current prevailing market conditions
- To build a robust and relevant evidence base of business needs across the two areas. This will consider the nature of company property requirements in terms of quality, scale and geographic location
- To assess future quantitative employment requirements to help inform the employment land policies of the Councils' LDPs.

Study Methodology

iii) A number of research methods have been used – site visits, interviews with property market stakeholders and a survey of 700 businesses (of which 354 responded). A number of major employers and landowners have been individually consulted, as have key public sector agencies such as the Welsh Government. Consultations include engagement with Betsi Cadwaladr University Health Board, Coleg Cambria and Glyndwr University to discuss the related needs of the health and education sectors. The property market in the local authority areas adjacent to Wrexham and Flintshire has been reviewed through desktop analysis of employment and planning strategies, and consultations with officers from those local authorities. The eight Town Councils and 60 Community Councils of Wrexham and Flintshire have been contacted by post and email. Finally, the land supply has been assessed against forecast data to understand future land need. A more detailed discussion of the methodology, compared to relevant practice guidance, is provided in Section 1.0.

Findings

iv) Wrexham and Flintshire have an economically active workforce. Local unemployment rates are low in the Welsh context and employment appears to be increasing as the national recovery from recession gains strength. However, Wrexham and Flintshire also include areas of high deprivation, notably Caia Park and Hightown, and Acrefair in Wrexham. Also Shotton, Connah's Quay, Holywell and Mold in Flintshire.

v) Flintshire's population is highly mobile. In 2012, the County had the highest rate of out-commuting in North Wales, with 41 percent of working residents commuting out to work. Wrexham is more self contained and 71 percent of working residents both live and work in the County Borough, in line with the Welsh average. Flintshire is a large exporter of labour to Cheshire West and Chester. Modest percentages of Flintshire residents also commute to Wrexham, Denbighshire or Liverpool. In Wrexham the key out-commuter destinations are Cheshire West and Chester, Shropshire and Flintshire.

vi) In-commuters to Wrexham came from Cheshire West and Cheshire, Flintshire, Shropshire and Denbighshire. 17.6 percent of the in-commuters to Flintshire came from Wrexham, whilst 16.0 percent of the in-commuters into Flintshire came from Cheshire West and Chester.

vii) Consideration of Welsh Government enquiries data suggests that both Wrexham and Flintshire attract good interest from larger businesses .In both cases around a third of enquiries received over 2006-2013 were from organisations looking for industrial/warehouse, and to a lesser extent, offices of more than 2,324 sqm.

viii) At the County level, WCBC report receiving regular inward investment enquiries, from a range of national and international sources. These are inevitably focused on Wrexham Industrial Estate and combine with requirements from large local businesses with expansion needs. In Flintshire, the Deeside Enterprise Zone is attracting interest from large businesses, some looking for sites in excess of 40 ha. , Hawarden Business Park, Broughton is also identified growing as a 'supplier village' for Airbus.

ix) The Company Survey highlighted a level of demand across all industrial sizes from

500 sqm to 1,000 sqm, and modest office requirements for a range of sizes up to 2,000 sqm. Moderate quality office and industrial units are required and there is a definite preference for freehold options over leasehold. Wrexham Industrial Estate, Deeside Industrial Estate and locations on the Chester boundary are most desirable.

x) Across the study area as a whole, industrial demand is for starter workshops of around 50 sqm and small business units of up to 929 sqm. Larger established firms want units of 929-1,858 sqm, in locations that can support them – Wrexham Industrial Estate and Llay Industrial Estate Wrexham; Saltney, Sealand and Queensferry in Flintshire. Agents talking specifically about Wrexham indicated a high level of demand for smaller industrial units, up to 465 sqm and particularly premises of 46-185 sqm.

xi) The office market operates at a smaller scale in both Wrexham and Flintshire. Most enquiries are for properties of no more than 186 sqm and larger suites can struggle to find occupiers. This partly reflects the proximity of both Counties to Chester, the major office centre for the sub-region. Stakeholders in Wrexham do report some increasing demand for smaller offices of up to 46 sqm.

xii) Demand for offices is often linked to demand for industrial/warehouse space as larger manufacturing and logistics firms seek associated office space for their expanding operations.

xiii) Consultations with a sample of the larger businesses in Wrexham and Flintshire suggest most are satisfied with their current premises. Only two of the company stakeholders consulted in the study area – Kronospan in Wrexham and Knauf Insulation in Flintshire – would potentially relocate as they are constrained by development in all directions. Kronospan in particular has identified land to the north of Chirk Industrial Estate as being crucial to its future growth needs.

xiv) All of the Welsh local authorities which neighbour Wrexham and Flintshire have sufficient employment land to meet their own needs and do not need to look to the Counties to support any shortfalls. Of the three neighbouring English local authorities, Cheshire West and Chester Council may potentially need to work with Flintshire to meet overlapping needs for employment land in the Deeside, Saltney and Sealand areas. Such matters would need to be discussed and agreed directly

between the respective local planning authorities.

Employment Land Supply

xv) At 31 March 2014 there was a baseline employment land resource of 531.04 ha of available employment land, made up of 79 sites. This comprised:

- 204.91 ha on 44 sites in Wrexham
- 326.13 ha on 35 sites in Flintshire.

xvi) Excluding land which is already developed, has significant access constraints, is held for the expansion of individual firms, is proposed for alternative uses or land which has identified ecological issues reduces the net land supply to 303.99 ha – 80.05 ha (20 sites) in Wrexham, 223.94 ha (22 sites) in Flintshire.

Employment Land Need – Wrexham

xvii) Forecast analysis suggests a net negative land requirement of -5.4ha over the next 17 years up to 2030. This is linked mainly to the projected contraction in manufacturing employment which will (negatively) bias the land requirement.

xviii) The identified requirement, from sectors projected to grow to 2030, is around 35 ha or 2.06 ha/year. The alternative approach, benchmarking on the basis of the 10 year average take up rate between 2003 and 2013 (which gives a figure of 66 ha or 3.9 ha/year) would yield a high land allocation relative to forecast outputs. However, as Table ES1 shows, Wrexham has an oversupply of land, against the realistic land stock of 80.05 ha, regardless of which forecast model is used.

Table ES1 – Land Forecast Models – Wrexham

Model	Existing Land/ Stock 2014[1], ha	Land Need 2013 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	80.05	-5.44	85.49	Net requirement based on projected growth/reduction of employment in industry sectors
High Growth Requirement	80.05	35.13	44.92	Based on projected growth of employment in industry sectors
Long Term Land Take-up	80.05	66.30	13.75	At an average take-up rate of 3.9 ha/year

Source: BE Group 2014

[1] N.B. Realistic headline supply at 31 March 2014

Employment Land Need – Flintshire

xix) Forecast analysis suggests a net negative land requirement of -19ha over the next 17 years. Again this reflects projected contractions in the manufacturing sector. However, looking at sectors projected to grow gives a positive requirement of 38.5 ha is required to 2030, or 1.90 ha/year

xx) Benchmarking against an eight year average take up rate since 2005 gives a high figure of 82.5 ha, or 5.5 ha/year when compared to the above forecasting. However, the scale of Flintshire's land stocks, even when unviable/undevelopable sites are removed (giving a realistic supply of 223.94 ha) means that the County retains a large land surplus regardless of which demand scenario is used (see Table ES2).

Table ES2 – Land Forecast Models – Flintshire

Model	Existing Land/ Stock 2014[1], ha	Land Need 2015 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	223.94	-19.1	243.04	Net requirement based on projected growth/reduction of employment in industry sectors
High Growth Requirement	223.94	28.50	195.44	Based on projected growth of employment in industry sectors
Long Term Land Take-up	223.94	82.50	141.44	At an average take-up rate of 5.5 ha/year

Source: BE Group 2014

[1] N.B. Realistic headline supply at 31 March 2014

Recommendations

xxi) This report has had full regard to the requirements of Planning Policy Wales, and TAN 23: Economic Development, to encourage and deliver growth through the planning system. The key recommendations are:

- That WCBC use the projected growth of employment in industry sectors as the main measure of Wrexham's future land needs for the period up to 2030**.** This indicates a minimum need for some 2 ha/year (or around 2.06 ha/year if split more exactly) and 35.13 ha overall – although a more optimistic approach would allow 2-3 ha/year taking account of past performance and the benchmark levels (i.e. up to 51 ha)
- That FCC also use the projected growth of employment in industry sectors as the main measure of future land needs for the period up to 2030. This

indicates a minimum need for some 2 ha/year (1.9 ha/year in exactly) or 28.50 ha overall – although a more optimistic approach would allow 2-3 ha/year taking account of past performance and the benchmark levels (i.e. up to 45 ha)

- In both local authority areas using these measures shows that there is a large surplus of employment land. However, although there is no overall need for either Council to identify further land allocations in the period to 2030, there is an exception with Wrexham Industrial Estate where high demand, combines with a constrained overall land supply (See Section 10.0). In order to address this issue, consideration should be given to identifying additional land on Wrexham Industrial Estate, exclusive of ecological mitigation, which may require the provision of mitigation land elsewhere
- Evidence suggests that the land needs of the health and education sectors are unlikely to exceed 3-4 ha in each local authority area, over the LDP periods
- It is recommended that, except for a few instances, that the existing employment land supply should be safeguarded for B Class Uses and other employment uses which achieve economic enhancement. It is also recommended that Non B-Class employment uses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses
- Exceptions to this include a number of sites which are unlikely to ever be developed for B1/B2/B8 uses. These are set out in Section 11.0, paragraph 11.26. It is recommended that the two Councils deallocate (or reallocate to other uses) these sites
- In terms of Wrexham and Flintshire's 61 identified Employment Areas, 52 of the areas achieve a grade A to C and should continue to be protected through the two LDPs. Strong protection should be given to the ten locations which achieved a grading of A or B. In terms of Ruabon Business Park, this protection should only be applied if a good quality B1 business scheme can successfully be delivered here. In the case of Wrexham, research has identified three additional employment areas across the County Borough which provide clusters of B1/B2/B8 accommodation but which are not readily identified as B-Class employment locations at present. These are Lightwood Green Industrial Estate, Overton; Llay Hall Industrial Estate and Riverside

Business Park and Rossett Business Village, Rossett/Lavister. It is recommended that these be protected as employment areas in the LDP

- The Council should work with neighbouring authorities in order to ensure a joined up approach to employment matters and economic development across the Mersey-Dee/North Wales sub-regions
- Review and monitor the employment land and premises position and undertake the study again in about three years, as 2030 is a long time in the future and much will happen before then
- Table ES3 sets out area specific recommendations on Wrexham County Borough, apart from Wrexham Industrial Estate. Table ES4 provides similar area recommendations for Flintshire.

Table ES3 – Wrexham Site/Area Specific Recommendations

Site/Area	Comment
Llay Industrial Estate	With the exception of site E1. 28 protect the remaining employment land here for B1/B2/B8 uses. Review the constraints and issues associated with site E1.31 Llay Industrial Estate (6.40 ha) to determine if the site is viable.
Wrexham Town	It is expected that 4.05 ha of land at Wrexham Gateway will be taken up in 2016. A further 4.75 ha remains available for development here, subject to improvements to the A483 junction and is receiving interest from potential occupiers. Given the current oversupply of land across the County Borough, this study cannot recommend the provision of further land here at this time. However, once the remaining 4.75 ha is taken up a local demand appraisal should be undertaken to see if there is a case for the provision of further B1 land here. In, and around, Wrexham Town Centre demand may support modest new developments for B1(ii) offices. These may be in the form of individual premises for owner occupation or larger multi-let (serviced or unserviced) schemes, possibly linked to larger town centre regeneration programmes. It is recommended that provided such schemes remain of a comparatively modest scale, and do not significantly add to the supply of employment land in the County Borough, that they be considered on their individual merits Cambrian Price Industrial Estate, Rivulet Road is identified as a long term regeneration opportunity for the town. Any redevelopment scheme should include an element of B1/B2/B8 uses, to replace that which would be lost.
Rural East (from Gresford south to the River Dee)	If it remains vacant consider Pickhill, Cross Lanes as a rural regeneration opportunity.
Gresford/Marford	Protect existing employment areas.
Rosset/Lavister, Burton	Rossett Business Village should be protected in the LDP.

Site/Area	Comment
Bradley, Rhosrobin, New Rhosrobin	Protect existing employment areas.
Gwersyllt (including Summerhill)	Protect existing employment areas.
Broughton (New Broughton, Pentre Broughton), Brynteg, Brymbo	Employment uses have been consented on the Steelworks site, Brymbo for 18 years, with no evidence that these uses will ultimately be delivered. WCBC needs to engage with the owners of the former and seek stronger assurances that B-class employment uses will ultimately be delivered here. Also to identify what efforts are being made to market this land to employment occupiers and developers. If such assurances cannot be obtained and/or that, despite appropriate efforts in marketing, there appears to be no demand for employment uses here then it is not recommended that WCBC continue to protect the land indefinitely. It is accepted that Broughton, Brynteg and Brymbo lack employment options at this time and if B1 uses cannot be delivered here, WCBC is encouraged to find an alternative site of comparable size.
Tanyfron/Southsea	Encourage the reuse of the remaining vacant properties at Southsea Industrial Estate.
The rural west (extending from Bwylchgwyn in the north to Trevor in the south)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Coedpoeth, Minera	Protect existing employment areas.
Rhostyllen, Bersham	Protect existing employment areas. Planning policy should separate the three distinct parts of Croesfoel Industrial Estate (roadside services, motor retail and industrial/warehousing) in the emerging LDP, with the goal of protecting the larger industrial/warehouse premises in the north from loss to alternative uses. Pulestone Industrial Estate is a small but active budget quality local employment area which should be protected in the emerging LDP.
Rhos, Johnstown	Protect existing employment areas.
Ruabon	Protect existing employment areas.
Cefn-Mawr, Acrefair and Rhosymedre	Protect existing employment areas. Advance Park Industrial Estate appears to be an area in decline and WCBC should continue to monitor conditions here. Proposals for refurbishment and/or necessary redevelopment of premises should be encouraged, but policy should ensure that the bulk of the premises are protected for B-Class employment, which could extend to include an element of trade use on the road frontage. WCBC should work to ensure that a reasonable element of the Former Flexsys site, Ruabon Works is retained for B1/B2/B8 employment, to offset employment options which may be lost if that site is redeveloped for a mix of uses.
Chirk	Protect existing employment areas. While recognising that there are some environmental issues to

Site/Area	Comment
	overcome it is recommended that the appropriateness of land to the north of Chirk Industrial Estate be considered in the emerging LDP, to support the specific growth of this key local business.
Rural South West	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Penley and the Rural South East (East of the River Dee)	Support the redevelopment of Penley Industrial Estate for an employment-led scheme which would deliver new B1/B2/B8 accommodation. Protect Lightwood Green Industrial Estate, Overton as an employment area in the LDP. Consider the appropriateness of allowing higher density infill development at this location to boost its employment potential.

Source: BE Group, 2014

Table ES4 – Flintshire Site/Area Specific Recommendations

Site/Area	Comment
Deeside	Growth proposals are well established and underway, no additional public intervention is required.
Broughton	Support Airbus's ongoing plans for change and growth Support the development of a supplier village at Hawarden Park/Chester Aerospace Park FCC should continue to monitor conditions at EM2.1 Warren Hall and engage with the Welsh Government to determine its priorities. If appropriate, FCC should seek a stronger role in delivery here. Also if there is no longer a strong prospect for a wholly B1/B2/B8 scheme here then further research would be required to determine if a broader mix of uses, appropriate to the location, could provide a viable development.
Saltney/Sealand	Recognise the growing importance of EM1. 24 Land East of Saltney Ferry Road as a key allocation serving both Flintshire and Chester. Work to overcome any access issues which may exist here. Review conditions at EM2.2 DARA Site to determine the real level of employment land availability at this location.
Queensferry/Shotton/ Connah's Quay	Notwithstanding the wider oversupply of employment land in Flintshire, brownfield regeneration opportunities are identified within local employment areas which could be brought forward comparatively quickly to meet needs and FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here.

Site/Area	Comment
Flint	The current land supply is limited to one planning consent (0.68 ha) for a builders merchants off Aber Road. However, this study has identified a number of smaller regeneration opportunities (discussed above), which could be brought forward comparatively quickly to meet needs. Where relevant these are informed by the Castle Park Industrial Estate Masterplan (2008). FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here, and elsewhere in the County.
Mold	Continue to engage with local businesses, particularly the identified larger manufacturing firms which may be lost to the town Monitor long term land allocations in Mold. Given the wider oversupply of land in the County, FCC should avoid protecting sites which are not of market interest and may not be viable for B1/B2/B8 development.
Gronant, Lanasa, Gwaenysgor, Trylawynd (the rural north)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.
Mostyn	Subject to environmental and other constraints support the growth of the Port of Mostyn, particularly where proposals would deliver active new business space, diversifying the Port from simply being a freight transhipment facility.
Greenfield/Holywell	Protect Greenfield Business Park, support proposals for further investment and particularly schemes that would deliver new high quality premises or refurbish existing space.
The Rural East (including Caerwys, Carmel, Gorsedd, Cilcain)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.
Halkyn	-
Buckley	Protect existing employment areas
Northop/Flint Mountain/Northop Hall	Support the growth and diversification of Northop Educational Campus.
Gwernaffield/ Gwernymynydd	-
The Rural South (including Hope, Leeswood, Penyffrodd, Treuddyn, Higher Kinnerton	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.

Source: BE Group, 2014

1.0 INTRODUCTION

1.1 This report provides a Joint Employment Land Review (ELR) for Wrexham and Flintshire. It has been carried out on behalf of Wrexham County Borough Council (WCBC) and Flintshire County Council (FCC) otherwise described as 'the Councils'.

1.2 The study has been commissioned to provide robust evidence to underpin and inform the Council's respective Local Development Plans (LDP) to bring them in line with the updated requirements of Planning Policy Wales (PPW) and Technical Advice Note (TAN) 23. It will analyse employment land and premises demand, supply and need to 2030.

1.3 BE Group, economic development and property consultants based in Warrington, has compiled this report. It was carried out during 2014.

1.4 The Study comprises three main elements:

- To review the existing employment land provision position, and the suitability and viability for the long term of sites and allocations for employment use in light of the current prevailing market conditions
- To build a robust and relevant evidence base of business needs across the two areas. This will consider the nature of company property requirements in terms of quality, scale and geographic location
- To assess future quantitative employment requirements to help inform the employment land policies of the Councils' LDPs.

Background

1.5 This ELR will form part of the evidence base for the preparation of policies and proposals in the emerging LDP for both Councils. The Review will include an assessment of the local economy and property market, a review of current employment land and the identification and appraisal of the need for, and potential of new employment sites which could meet the joint area's long term needs.

1.6 The ELR will therefore help assess the suitability of sites, indicating which sites might be best safeguarded for employment uses; any sites that appear no longer suitable for employment uses at least in their present form, and any need for new allocations. Planning policies are intended to intervene in the market to ensure amongst other

things there is an appropriate balance between housing and employment uses in Wrexham and Flintshire. And whilst the drive to deliver more housing is important, it should not be at the expense of losing important sites that could contribute to local economic development. However, as well as securing sustainable development for employment purposes, a realistic view is taken of the operation and vitality of the market.

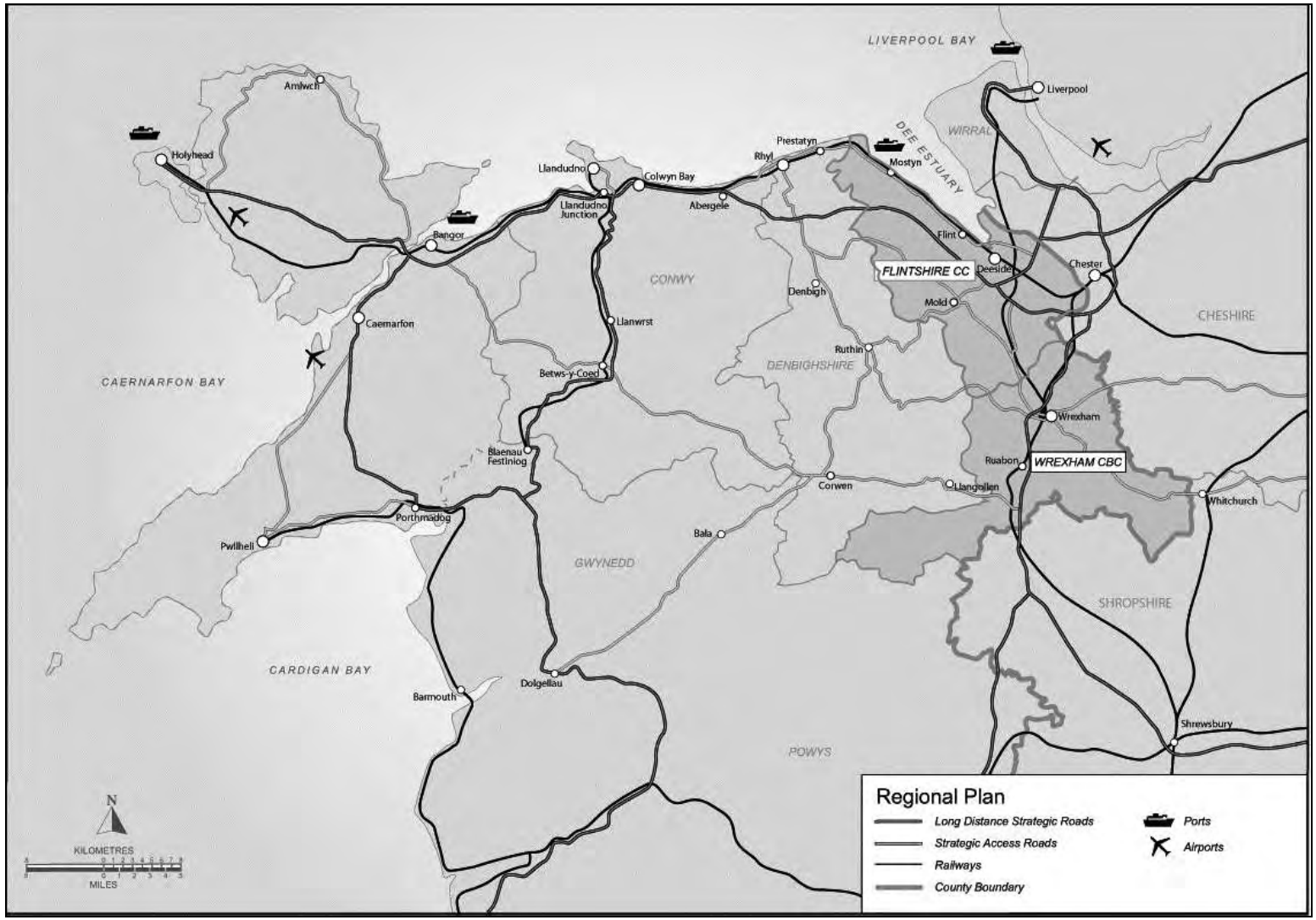
1.7 The Review covers all industrial, warehousing and distribution uses, as well as offices. It does not refer to all uses that provide jobs, but to the above group of uses, which tend to share certain locational and physical characteristics. The Review is therefore primarily concerned with those uses included within the planning Use Class B1a – B1c (business offices/light industrial), B2 (general industrial) and B8 (storage and distribution) and appropriate sui generis uses. However, in accordance with TAN 23 regard is had to alternative uses that may be appropriate on employment sites.

Study Area

1.8 With a combined population of 287,350 (Census 2011), Wrexham and Flintshire sit in the North East of Wales (see Figure 1). Along with Anglesey, Conwy, Denbighshire and Gwynedd, the authorities make up the non-statutory area of North Wales as identified in the Wales Spatial Plan (2008 Update). The two Counties also lie adjacent to the English authorities of Cheshire West and Chester and Shropshire.

1.9 This cross border connection with neighbouring Cheshire and Merseyside is influenced by activity along the M56 and A55 making the areas accessible along an east-west axis. Running north to south are the arterial routes of the A483, leading down to the Brecon Beacons, whilst the A55, not only connects to England, but provides access to the westerly tip of Anglesey.

Figure 1 – Wrexham and Flintshire



Source: Wrexham County Borough Council, 2014

1.10 Urban development in Flintshire is concentrated in the coastal areas on the Dee Estuary, which has traditionally been an area for industrial development. With the expansion of Deeside Industrial Park, the County has become a significant focus for sub-regional employment generation. Major employers include Iceland Foods and Tata Steel at Deeside Industrial Park, and Airbus at Broughton. Key employers in Wrexham include Kronospan at Chirk; Magellan Aerospace at Llay; Wockhardt, Ipsen Biopharm, Avox, JCB and others at Wrexham Industrial Estate. Employment is most heavily concentrated at Deeside and Wrexham industrial estates, with a particular emphasis on the manufacturing sector. Other industrial estates are located in and around the towns of Wrexham and Flint, with both of the areas' settlements including one, or more, local industrial estates

Employment Land Review Guidance

1.11 The most relevant Welsh Government Guidance is TAN 23 which sets the basis for assessing economic development at a strategic level. It does not however, provide the step-by-step detail to assess the current supply and future need for employment land and sites, for the production of Employment Land Studies.

1.12 Guidance on undertaking employment land reviews is available within Planning Practice Guidance (PPG) (DCLG 2014). Although this is English Guidance, the general approach provided in the PPG is equally applicable to the Welsh context.

1.13 Within the PPG, two guidance notes have been produced – *Housing and Economic Land Availability Assessment* which provides a methodology of reviewing suitable land, and *Housing and Economic Development Needs Assessments*, which provides guidance on how future needs can be determined. The assessment process takes the form of a five stage methodology under the following headings:

- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a desk top review identifying as wide a range as possible of sites and broad location for development (including those existing sites that could be improved, intensified or changed). The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
- **Stage 2: Site/broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously

allocated land and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites for their 'suitability', 'availability' and 'achievability' in order to confirm which of them are unsuitable for/unlikely to continue in employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:

- *"The recent pattern of employment land supply and loss to other uses (based on extant planning permissions and planning applications). This can be generated though a simple assessment of employment land by sub-areas and market segment, where there are distinct property market areas within authorities.*
- *Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums).*
- *Market signals, such as levels and changes in rental values, and differentials between land values in different uses.*
- *Public information on employment land and premises required.*
- *Information held by other public sector bodies and utilities in relation to infrastructure constraints.*
- *The existing stock of employment land. This will indicate the demand for and supply of employment land and determine the likely business needs and future market requirements (though it is important to recognise that existing stock may not reflect the future needs of business). Recent statistics on take-up of sites should be consulted at this stage, along with other primary and secondary data sources to gain an understanding of the spatial implications of 'revealed demand' for employment land.*
- *The locational and premises requirements of particular types of business.*
- *Identification of oversupply and evidence of market failure (e.g. physical or ownership constraints that prevent the employment site being used effectively, which could be evidenced by unfulfilled requirements from business, yet developers are not prepared to build premises at the prevailing market rents)."*

- **Stage 3: Windfall Assessment** Not applicable as relates to housing only.
- **Stage 4: Assessment Review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
    - Sectoral and employment forecasts and projections (labour demand)
    - Analyses based on the past take-up of employment land and property and/or future property market requirements.

  The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the LDP periods for both local authorities and an analysis of the likely 'gaps' in supply that need to be filled
- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, which will be used to inform the LDPs for each authority.
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1.14 Table 1 shows how the Employment Land Review aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Identification	
Step 1 – Determine assessment area and site size	Undertaken by Wrexham and Flintshire Councils
Step 2 – Desktop review of existing information	Covered in Sections 2, 3, 4, 5
Step 3 – Call for sites / broad locations	Undertaken by Wrexham and Flintshire Councils
Step 4 – Site / broad location survey	Covered in Sections 6, 10, 11
Stage 2 – Site / Broad Location Assessment	
Step 5 – Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Sections 6,7, 8 and Appendices 5, 6 and 7
Step 6 – Overcoming constraints	Covered in Section 9 and Appendices 5 and 6
Stage 3 – Windfall Assessment	
Step 10 – Determine housing / economic development potential of windfall sites (where	N/A

justified)	
Stage 4 – Assessment Review	
Step 11 – Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 9
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	ELR produced by BE Group and monitoring undertaken by Wrexham and Flintshire Councils

Source: BE Group 2014

Study Methodology

1.15 These paragraphs set out the study's methodology with reference, where relevant, to the five stages of PPG guidance defined in Table 1.

Stage 1 – Site / Broad Identification

1.16 The desktop review element of this stage is covered in Sections 2-5 of this report. Specific tasks undertaken include:

- A review of Welsh national, sub-regional (North Wales and Mersey-Dee) and local planning policy and economic development reports and strategies. This is reported in Section 2.0
- A review of socio-economic conditions in the study area. This aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth. It utilises both Welsh Government and Office for National Statistics data, as well as relevant information from the 2011 Census. This is reported in Section 3.0. Within this section, Wrexham and Flintshire is compared to the four other local authorities in North Wales, where possible, to Wales as a whole as well as the two English local authority areas of the Mersey Dee Area – Cheshire West and Chester and the Wirral.
- Statistical analysis of the property markets in Wrexham and Flintshire, reviewing Welsh Government enquiries data for land and property and, where available, local authority level enquiries. A review of the current supply of vacant premises in the study area. This data was initially taken from a mixture of property agents' websites and the local authority commercial property registers of the two Counties. This was subsequently augmented with site visits and telephone discussions to determine that the identified vacant properties remain available. This is reported in Section 4.0
- Face-to-face and telephone interviews with property market stakeholders

such as developers, investors and their agents, to gain firsthand accounts of demand for land and premises in the study area. This is reported in Section 5.0.

Stage 2 – Site / Broad Location Assessment

- A review of the existing portfolio of employment land in the study area (as defined by the two local authorities), not only how much there is, but also its quality, type, suitability and availability. Land is reviewed through a mixture of site visits, desk top appraisal and telephone discussions with landowners and developers. Reflecting the PPG, sites of less than 0.25 ha are excluded from consideration. Unviable/undevelopable sites are identified and excluded, as are sites retained for the expansion of specific firms or proposed for non B-class uses. Removing those sites provides a realistic land supply for each local authority area. The base date for the employment land supply analysis (which differs from the base dates used for forecasting) is 31st March 2014. This means that any employment planning permissions approved after 1st April 2014 do not affect the identified land supply, neither do any site completions which occurred after that date. This is reported in Section 6.0
- Consultations were undertaken with a number of the Council's major private sector employers and key public sector agencies, including the Welsh Government. These include engagement with Betsi Cadwaladr University Health Board, Coleg Cambria and Glyndwr University to discuss the related needs of the health and education sectors. This is reported in Section 7.0
- The property market in the local authority areas adjacent to Wrexham and Flintshire has also been reviewed. This has been undertaken through consultations with officers from the relevant local authorities, combined with desktop analysis of the Employment Land Studies and LDPs or Local Development Frameworks of those local authorities. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Council's land and property market, particularly as the area sits within the Mersey Dee Area comprising North East Wales, West Cheshire and Wirral. This is reported in Section 7.0
- The eight Town Councils and 60 Community Councils of Wrexham and Flintshire have been contacted by post and email to gain their views on the local level supply and demand for land. This is reported in Section 7.0
- As further evidence of demand for land and premises a survey of 700 local

businesses across the two local authority areas (online and by post, with follow-up telephone calls) was undertaken. This surveyed 5 percent of the relevant business population in Wrexham and Flintshire. This is reported in Section 8.0

Stage 4 – Assessment Review

- The land supply has been assessed against forecast data to understand future land need. Future projected growth in the health and education sectors, and the resulting additional needs in terms of land and premises, are also considered. This is reported in Section 9.0

Stage 5 – Final Evidence Base

- This is then developed into a series of economic development recommendations which are reported Sections 10.0 and 11.0.

1.17 At Appendix 1 we have included a schedule of all consultees.

2.0 STRATEGIC CONTEXT

Introduction

2.1 This section focuses on Welsh Government, sub regional and local reports and strategies that have a relevance to the allocation of employment land and premises, and summarises the relevant output.

2.2 However, it is important to note that all the strategies and reports, particularly the research studies, represent point in time analyses of the study area, sub-region, etc. All reflect the time at which the relevant research was undertaken which, in the case of some of the older documents, may predate the recent recession. Some may therefore express views and opinions that are no longer up to date, or have been proved inaccurate in subsequent years.

2.3 An understanding of the strategies and reports contained in this review is needed to show strategic alignment and a holistic approach to promote sustainable development. However, it is not part of this review to critique or update past studies, rather to undertake fresh research into the economies and property markets of Wrexham and Flintshire. This study will form its own conclusions and where its findings do not accord with the views of past research, form independent recommendations accordingly.

Welsh Government

Planning Policy Wales, 7h Edition – Welsh Government (2014)

2.4 Planning Policy Wales (PPW) 7th Edition, sets out the land-use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs) which are discussed below. Together with a number of circulars and policy clarification letters, PPWs and the TANs comprise the national planning policy for Wales. National planning policy, alongside the Wales Spatial Plan (discussed below) should be taken into account in the preparation of LDPs.

2.5 Chapter 7 of PPW sets out national policies for economic development. For planning purposes, the Welsh Government defines economic development as *"development of land and buildings for activities that generate wealth, jobs and incomes. Economic land uses include the traditional employment land uses (offices, research and*

development, industry and warehousing), as well as uses such as retail, tourism, and public services."

2.6 The document states the importance of the planning system supporting economic growth, and ensuring that there is sufficient land that is suitable for economic uses. Local planning authorities should facilitate the provision of sufficient land to meet market demand, except where there are good reasons to the contrary. In addition, local planning authorities should steer economic development to the most appropriate locations by:

- Coordinating development with infrastructure provision
- Supporting national, regional and local economic policies/strategies
- Aligning jobs and services with housing (where possible) to reduce the need for travel, especially by car
- Promoting brownfield, vacant and underused land
- Delivering physical regeneration and employment opportunities to disadvantaged communities.

2.7 Local planning policies for economic development must allow developers and others to secure the efficient and effective use of land. Plans and decisions need to be based on an up to date and locally specific evidence base which demonstrates the *"suitability of the existing employment land supply in relation to the locational and development requirements of business."* That evidence base should include an Employment Land Review which is *"relevant to prevailing market conditions and the requirements of the development plan."*

2.8 Local planning authorities should ensure that *"the economic benefits associated with a proposed development are understood and that these are given equal consideration with social and environmental issues in the decision-making process, and should recognise that there will be occasions when the economic benefits will outweigh social and environmental considerations."*

2.9 Mixed-use development should be encouraged, and should adjoin existing settlements where appropriate. Employment and residential uses can be compatible and when considering proposed residential developments which are close to existing industrial and commercial uses, local planning authorities should ensure that *"both amenity and economic development opportunities are not unduly compromised."*

2.10 New business creation is essential to sustain and improve rural economies. In particular, self-employment and micro-businesses should be encouraged through a flexible approach to home working. However business development that only offers short-term economic gain may not be appropriate in rural environments.

2.11 Whilst some rural employment can be created through the re-use of buildings, new development may also be required. This new development should, where possible be within or adjacent to settlement boundaries and preferably close to public transport links. In addition, where businesses cannot be accommodated within settlements, appropriate small-scale rural enterprise should be permitted on unallocated land. The expansion of existing businesses located in open countryside should be supported provided there are no unacceptable impacts on local amenity.

2.12 Local planning authorities should also adopt a positive approach to farm diversification, even when those farms are not served by public transport. The provision of a sensitively designed new building within an existing farm complex may be appropriate where the opportunity to convert existing buildings does not exist.

2.13 Local planning authorities should support the shift towards a low carbon economy. Achieving this may require the development of clusters of industrial and commercial uses, which would derive environmental benefits from co-location. Authorities should also look favourably on proposals for new on-site low carbon energy generation, such as energy recovery from waste.

2.14 Innovative business and technology clusters may also be important to the economic growth of a local authority area. Development plan policies need to identify potential networks and cluster areas, and set policies for the creation of the transport, environmental and telecommunications infrastructure needed to support such networks.

2.15 Finally, certain kinds of businesses may be especially important in providing opportunities for disadvantaged social groups. Identifying the need for such businesses will require research on the part of local authorities.

2.16 In summary, development plans should:

- *"Reflect work with neighbouring authorities and other relevant stakeholders to plan strategically for employment land provision;*
- *Be underpinned by an up to date and appropriate evidence base to support policy choices and land allocations for economic development;*
- *…Set out an economic vision for the area, including a broad assessment of anticipated employment change by broad sector and land use;*
- *Provide targets on land provision for the employment uses (Classes B1-B8), showing net change in land/floorspace for offices and industry/warehousing separately, and protect these sites from inappropriate development;*
- *Include policies relating to future development on existing employment sites to protect them from inappropriate development:*
    - *To encourage the regeneration and re-use of sites which are still suitable and needed for employment;*
    - *To control and manage the release of unwanted employment sites to other uses;*
- *Seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses;*
- *Propose specific locations for those necessary industries which are detrimental to amenity and may be a source of pollution;*
- *Seek to promote and facilitate development that will deliver physical regeneration;*
- *In safeguarding existing sites and providing new sites, prioritise sites that deliver appropriate job and training opportunities to disadvantaged communities;*
- *Concentrate development that attracts large numbers of people, including retail and offices, in city, town and village centres;*
- *Include criteria-based policies to deal with development not specifically allocated in the development plan and help respond to unexpected change;*
- *Include policies on the scope for new economic development in and adjoining rural settlements and identify suitable sites. In remote rural areas and smaller settlements a criteria based approach should be considered;*
- *Include policies encouraging farm diversification and new rural development opportunities;*
- *Identify protection zones around establishments that hold hazardous substances and protect the ability of existing establishments to operate or expand by preventing the incremental development of vulnerable uses in the*

vicinity of such sites."

Technical Advice Notes – Welsh Government

2.17 These guidance notes and statements are intended to assist local authority policy makers in the preparation of LDPs. Of particular relevance to this study is TAN 6: Planning for Sustainable Rural Communities and the recently adopted TAN 23: Economic Development.

TAN 6: Planning for Sustainable Rural Communities (2010)

2.18 This TAN highlights that *"strong rural economies are essential to support sustainable and vibrant rural communities."* Development plans should facilitate diversification of the rural economy, accommodating the needs of both traditional rural industries and new enterprises, whilst minimising impacts on the local community and the environment.

2.19 Meeting the economic needs of rural communities will require the provision of a diverse range of employment sites. Where possible such sites should be located within or adjacent to settlements. A rural employment exception policy may also be required, setting out the criteria against which planning applications for employment use on the edge of settlements, on sites which are not specifically allocated in the development plan, will be assessed. The expansion of existing rural businesses, including businesses that are located in the open countryside should be supported providing there are *"no unacceptable impacts on local amenity."*

2.20 If there is a shortfall of employment land in the local authority area then planning authorities should resist development proposals that could result in the loss of employment sites, unless the applicant puts forward land or property of equivalent or greater employment value.

2.21 Planning authorities should also encourage the growth of self employment and micro businesses by supporting home working. Planning applications for employment premises at home should be supported and development plans should identify new opportunities for home/work developments.

2.22 Farm conversions to employment uses will often be appropriate in rural areas. Appropriate uses at such locations could include food and timber processing and

packing, services (offices, workshop facilities, equipment hire and maintenance), sports and recreation services, the production of non-food crops and renewable energy.

TAN 23: Economic Development (2014)

2.23 This TAN provides guidance on planning for economic development at a strategic level, identifying and assessing the economic benefits of development proposals and establishing an evidence base to support the economic development policies of LDPs.

2.24 Echoing PPW, the TAN advises that local planning authorities should aim to provide the land that the market requires (unless there are good reasons to the contrary). *"Local planning authorities should recognise market signals and have regard to the need to guide economic development to the most appropriate locations, rather than prevent or discourage such development."*

2.25 However, there may also be instances when planning authorities do not provide the land the market demands, in the places where the market demands it. Proposed developments or site allocations may be resisted because they would have unacceptable environmental impacts, divert demand from town centres or would go against agreed spatial strategies. In these circumstances planning authorities should look for alternative sites which offer the same, or very similar, advantages.

2.26 A sequential test should also be applied to economic development proposals or possible employment land allocations. First preference should be given to sites within the boundaries of settlements (including planned new settlements and urban extensions), then edge-of-settlement sites and finally land in the open countryside. Land may be identified in less preferable locations if the resulting benefits (i.e. jobs accommodated, alternatives, special merit) *"outweigh any adverse impacts of the development."*

2.27 Local authorities are encouraged to work jointly in sub-regional groups to prepare joint economy evidence bases (such as this Joint Employment Land Study), including an analysis of the sub-regional commercial and industrial property market. Such sub-regional strategies should also focus on identifying strategic sites of national and regional importance. In the case of Flintshire, major sites such as Warren Hall and

land at the Deeside Enterprise Zone will have influence across both North Wales and into Cheshire and the wider North West of England which need to be considered.

2.28 Where a planning authority is assessing a site allocation or planning application that could cause social or environmental harm, there are three issues which need to be considered:

- *"Alternatives: if the land is not made available (the site is not allocated, or the application is refused), is it likely that the equivalent demand could be met on a site where development would cause less harm, and if so where?*
- *…Jobs accommodated: how many direct jobs will be based at the site?*
- *…Special merit: would the development make any special contribution to policy objectives?"*

2.29 An example of a development of 'special merit' could be a greenfield development that could attract high-value, high-skill businesses that would not be interested in a lower-quality urban environment.

2.30 In rural areas, development may be acceptable in countryside locations if it makes communities more sustainable (encouraging people to work close to home), meets the expansion needs of an existing local business or an existing business cluster.

2.31 In producing LDPs, local planning authorities should:

- Develop a broad vision for the Plan which *"must be consistent and coherent so that the economic, social and environmental considerations support each other"*
- Set land provision targets which meet the market demand for land. Local authorities should work together to steer development to sustainable locations.

2.32 In terms of forecasting future growth, the TAN, echoing Planning Policy Wales, advocates "*a broad assessment of anticipated employment change by broad sector and land use".* Specifically, this will require *"the preparation of possible future economic scenarios with plans developed in a way which ensures they are robust across the more likely scenarios and contain the flexibilities necessary to adjust to changing circumstances. The starting point for scenarios would normally be past trends at a regional level. Such scenarios could be adjusted to reflect*

different policy or demographic assumptions."

2.33 The TAN accepts that such forecast modelling can often be imprecise – *"Models of future economic scenarios are surrounded by a large margin of uncertainty, and often more so for individual authorities than for larger areas. Modelling may be most successful when based on functional economic areas such as travel to work areas and housing market areas."*

2.34 Where projected local authority growth differs markedly from that expected for the wider region, *"the authority should provide an evidence-based justification for these differences, much as they would have to in respect of population projections for their area."* Predicted employment figures should usually be expressed as a range of scenarios to reflect different economic outcomes and policy options. Ultimately however, *"the level of growth envisaged must be realistic, able to withstand scrutiny and be consistent with the other aspirations of the plan including population and housing projections."*

2.35 Finally, the TAN highlights that existing employment sites should only be released for other uses if:

- *"They have poor prospects of being re-occupied for their previous use;*
- *And/or the particular market that the site is part of is oversupplied;*
- *And/or the existing employment use has unacceptable adverse impacts on amenity or the environment;*
- *And the proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained;*
- *Or other priorities, such as housing need, override more narrowly focused economic considerations."*

People, Places, Futures: The Wales Spatial Plan Update – Welsh Government (2008)

2.36 The Wales Spatial Plan provides a strategic framework for future development and policy in Wales. It provides the context that LDPs should take account of. The national vision of the Plan is that: "*We will sustain our communities by tackling the challenges presented by population and economic change. We will grow in ways which will increase Wales' competitiveness while assisting less well-off areas to catch up on general prosperity levels and reducing negative environmental impacts.*

We will enhance the natural and built environment and we will sustain our distinctive identity."

2.37 In order to promote a sustainable economy (one of five themes in the Plan) employment-related development should occur near public transport, housing and infrastructure developments. The development of brownfield sites should be prioritised over greenfield land.

2.38 Wrexham and Flintshire lie in the North East Wales sub region. The Spatial Plan vision for the sub region is that it will become: *"An area harnessing the economic drivers on both sides of the border, reducing inequalities and improving the quality of its natural and physical assets"* (Welsh Government, Page 53). The Plan recognises key elements to achieve the vision for North East Wales and includes:

- strengthening key hubs as a focus for investment in future employment, housing, retail, leisure and services
- developing sustainable accessibility between hubs, coastal and border towns are rural parts of the area
- improving the quality and diversity of the economy, with a focus on high value manufacturing and services, including a high quality year-round tourism sector
- developing the skills and education of the current and potential workforce
- promoting sustainable development.

2.39 North East Wales has a relatively high number of large employers, outside which the economy is dominated by micro businesses. The establishment and growth of indigenous and incoming businesses needs encouragement. The Area must offer a high quality built and natural environment, a highly skilled and flexible workforce, a range of appropriate sites and premises, research and development and office opportunities and infrastructure such as effective transport and communications links.

2.40 Wrexham, alongside Flintshire and Denbighshire, has crucial cross-border linkages to the wider area of Chester and West Cheshire, with opportunities of economic growth to benefit all in the area. This will be achieved by linking areas of opportunity with areas in need of regeneration. Working towards this vision, the Mersey Dee Alliance will have an important role to play in supporting the implementation of the strategy through facilitating close collaboration and partnership working across North

East Wales, West Cheshire, and the Wirral.

2.41 The role of the mainstream manufacturing sector in Flintshire and Wrexham is of particular importance for the international market. *"The cross-border area of North East Wales has redeveloped itself very successfully into one based on high value-added manufacturing and services. A number of these sectors are now considered to be of national or international significance: aerospace, automotive manufacturing and financial services."* Key areas working in international markets include Broughton (high technology manufacturing), Deeside (high technology and mainstream manufacturing), and Wrexham (mainstream manufacturing).

2.42 The focus should be on developing such existing high value sectors. However, at the same time there are opportunities to diversify the economy into new and emerging industries and sectors. If the economy of North East Wales has a structural weakness, it is felt to be in the lack of graduate level employment, and in its professional services and financial service sectors, where the Chester and Cheshire cross-border area has greater strength.

2.43 North East Wales has a relatively high number of large employers, although micro businesses dominate overall. A key element of supporting sustainable economic development will be in the provision of a suite of strategic employment sites across North East Wales in order to retain and attract high quality employers. It will be particularly important to maintain the quality of the offer at established key employment sites in the North East Wales, notably in the major industrial estates in Wrexham and Deeside.

2.44 Across North East Wales as a whole there are felt to be (in 2008 at least) sufficient or even surplus levels of employment land allocated. However the Spatial Plan recognises that the specific type and quality of sites available may not be suited to the future demands from employers, which may require smaller units for service or high value manufacturing activities.

2.45 The Wales Spatial Plan also argues that there are opportunities for significant employment growth in health, particular around major hospitals in Wrexham. Furthermore, major industrial estates in Wrexham are one of a key number of

established employment sites that continue to be supported. The Plan also emphasises the need to give appropriate and sympathetic consideration to the employment and regeneration needs of the rural hinterland, otherwise there are likely to be increased issues relating to commuting.

2.46 The Spatial Plan makes reference to pockets of some of the most deprived urban areas in Wales, and includes areas of Wrexham. Here, there are problems associated with poverty, multiple deprivation, low levels of economic activity and low quality housing and infrastructure. Despite recent improvements in economic inactivity rates remain high in certain pockets, and are an important issue in rural communities and Communities First areas in Wrexham and elsewhere.

2.47 Some communities in Wrexham and Flintshire are experiencing relatively high levels of economic in-migration which presents the opportunities and challenges in terms of service provision but has helped the economy by filling jobs in a very tight labour market.

Sectors Delivery Plan – Welsh Government (2013)

2.48 To support the Welsh economy, the Welsh Government's Department for Business, Enterprise, Technology and Science will focus support into nine key sectors:

- Energy and Environment
- Construction
- Creative Industries
- Advanced Materials and Manufacturing
- Financial and Professional Services
- Food and Farming
- Information and Communication Technologies (ICT)
- Life Sciences
- Tourism.

2.49 Welsh Government's short, medium and long term strategic priorities for each sector, excluding tourism, are set out in Table 2.

Table 2 – Welsh Key Sectors – Challenges and Relevant Welsh Government Strategic Priorities

Sector	Relevant Strategic Priorities		
	Short Term	**Medium Term**	**Long Term**
Energy and Environment	• Stimulate Enterprise Zone opportunities by ensuring alignment with Energy and Environment priorities in order to create and maximise opportunities for the use of renewable technologies • Provide tailored packages of support for businesses, particularly for those projects offering the greatest potential, including the delivery of a SME Energy and Environment revenue development fund • Secure commitment from funders for commercialisation of projects and knowledge transfer for specifically identified projects • Continue working with industry to seek solutions for high and increasing energy costs • Develop proposals for projects, identifying funding requirements and formulating case-by-case propositions to immediately target marine energy with particular emphasis on unlocking barriers for the sector • Develop thematic action plans for the sector using a whole government, cross-sector and multi agency approach.	• Gain representation on and early engagement with UK funding organisations to shape the future design of funding rounds so that they align with the Energy and Environment sector plan • Formulate and execute a marketing plan, for the sector and projection of Wales in conjunction with the Energy Wales Programme Board • Develop a cross-sector South East Energy hub approach to ensure that opportunities for Wales arising from UK nuclear developments and from any future Severn Barrage development are fully exploited.	• Conduct specific technical analysis of areas needed to grow the sector and deliver the commitments made in the First Minister's Energy Wales Policy Statement and objectives set by the Energy Programme Board, including developing supply chain opportunities across the whole sector; sector infrastructure, including ports sites and premises; trade opportunities; and marketing • Directly secure business and industry viewpoints into the shape and form of Natural Resource Wales • Work with stakeholders, developers and local authorities on developing a proposition to support future marine energy in Wales and unlock the potential from our seas.
Construction	• Identify barriers, and influence policy changes, to improve the regulatory and legislative background • Maximise the opportunities for business arising from a national infrastructure plan for Wales • Improve the UK and overseas market penetration potential of competitive and niche high value businesses via market awareness and international trade programmes.	• Improve the sectors' understanding of Procurement Standards and Best Practice • Work across Welsh Government to Identify Sovereign Growth Funds, EU Structural Funds and Venture Capital Funding to further deliver Government led projects across Wales • Develop local expertise and target internationally mobile "medium term" supply chain growth opportunities, e.g. nuclear and other energy and environmental technologies.	• Reduce long term negative impacts of new construction related policies, and regulations on the sector through securing more effective consultation and consideration at all levels of Government • Monitor and evaluate evolving market trends and offer evidence-based and business focused advice relating to the skills agenda • Identify mechanisms which maximise Wales' future return on investment on public sector expenditure and benefit the local economy, community and supply

Sector	Relevant Strategic Priorities		
	Short Term	**Medium Term**	**Long Term**
			chain overall.
Creative Industries	• Ensure appropriate support mechanisms are in place to support commercial business growth, including advice and information, access to finance, mentoring, international trade support, and networks • Develop and pilot methods to accelerate the growth of digital media in Wales, including a digital development fund to help businesses exploit new market opportunities through emerging digital technologies • Undertake a comprehensive mapping study of the creative industries in Wales • Establish a broadcasting advisory panel, to ensure Wales derives the maximum economic, social and cultural advantages that can be practically achieved from the public service broadcasters • Undertake an independent review of industry education and training to ensure that the requirements of industry are fully understood • Map EU and UK funding available to the sector • Seek to maximise the impact that public sector procurement has on the creative industries in Wales, including through the development of guidelines for procurement of creative services • Support inward investment, including through a strong and economically-focused Wales Screen Commission location service.	• Use Government influence to lever in the maximum European and UK support available for the creative sector in Wales, while ensuring that projects in receipt of funds are of a high quality and aligned with strategic priorities • Support the development of physical and digital industry infrastructure in Wales, building upon identified strengths and assets.	• Seek to ensure that Wales offers an exceptional environment for the creation and exploitation of digital creative content with: o Full next generation broadband coverage o Attractive production locations o Specialist business support and funding o Skilled, talented personnel o Training and education aligned to the needs of business and the digital economy o Innovative use of public sector spending to support creative o Businesses o Ground-breaking projects supported by European funding.
Materials and Manufacturing	• Support the manufacturing base in Wales across the value chain through capital and revenue support with the aim of safeguarding existing jobs and assisting opportunities for the creation of new jobs • Work with companies in Wales and globally to identify opportunities for enhancing the manufacturing supply chain in Wales	• Develop and support capacity building initiatives to underpin the rollout of the sector strategy • Exploit new evidence and focus on areas of greatest potential impact • Maximise opportunities in the delivery of	• Promote and encourage a culture of research, development, innovation and design across the manufacturing value chain in Wales • Improve skill levels to support the journey of companies moving up the value chain • Support companies to become more

Sector	Relevant Strategic Priorities		
	Short Term	**Medium Term**	**Long Term**
	• Implement a dedicated anchor and regionally important company strategy • Generate Inward Investment and Trade opportunities for the sector in Wales • Support companies through programmes focussed on delivering innovation and skills e.g. Innovation Vouchers and SMART grants, apprenticeships and Skills Growth Wales • Deliver a Welsh Manufacturing Summit, bringing together the private sector, public sector and academia to showcase Welsh Industry, provide a platform for engagement and consider key challenges and responses to create more jobs, growth and wealth • Review and update the evidence base to support the strategic direction of the sector.	Enterprise Zones in Wales • Develop and implement a key stakeholder engagement programme to achieve buy-in to the sector strategy, continually consulting and reviewing/refining the key deliverables.	competitive through capital investment and adoption of new systems and business models • Support businesses to access the global market • Develop the proposition for Wales as a desirable location for manufacturing operations and to proactively attract new investment.
Financial and Professional Services	• Develop a three year marketing plan • Engage with the largest 150 Financial and Professional Services companies in Wales and provide support for those with job creation projects • Promote the Wales proposition to the top 400 companies in London to encourage them to move part or all of their head office support functions to Wales • Promote the Wales proposition to UKTI and overseas offices and encourage them to market Financial and Professional Services for Wales across the world • Promote collaboration between industry, schools and universities to help make Wales one of the easiest places to set up and operate Head Office business functions in Europe • Establish a network of diaspora and business testimonials in London and internationally to help drive the message that Wales is open for business	• Leverage the expanding Cardiff Central Enterprise Zone as a first class location for Financial and Professional Services businesses • Establish Wales as an attractive investment location • Raise awareness of career opportunities in the sector in Wales • Establish a network of business mentors to help businesses grow successfully.	• Grow employment in the sector in Wales to 200,000 by 2021 • Grow sector GVA to match the UK average by 2021 • Create the right economic environment and provide the necessary support to allow Financial and Professional Services companies to grow successfully • Raise Wales' international profile and attract Investment with a clear focus on London.

Sector	Relevant Strategic Priorities		
	Short Term	**Medium Term**	**Long Term**
	• Develop and improve an accessing finance website for Welsh businesses.		
Food and Farming	• Undertake a qualitative research and analysis of the food industry in Wales, to better understand the sector • Develop a set of Key Performance Indicators and publish these as part of a Delivery Plan with targets, data, and business approach to provide direction for the food and farming sector.	• Take all practical steps to benchmark and significantly increase the capacity of Welsh agricultural raw material that is processed in Wales • Promote innovation and entrepreneurship in the food sector through a range of mentoring support, management training, marketing and other specific programmes • Work with the Food Centres and re-brand them to 'Food Business Development Centres' to increase their outputs and ensure effective collaboration with employers and business mentors • Establish a base line of evidence on the procurement of food and drink from Wales in order to create targets to optimise growth in this area • Establish a Welsh Supermarket Forum in order to improve communication with this important part of the food and farming sector.	• Identify food and drink companies of all sizes with the ambition and capacity to create significant sustainable growth when prioritising resources • Establish the Cross Government Working Group on Food, to be chaired by a Welsh Government Minister, to co-ordinate and develop policy, and deal with the Key Drivers and Indicators across the Welsh Government.
Information and Communication Technologies (ICT)	• Hold a series of workshops with all Trust, Security and Analytics stakeholders in Wales to scope opportunities for development and other interventions that may be necessary • Explore Predictive Crime Analytic with both the Police and private sector.	• Exploit PSBA Network and Next Generation Broadband • Define and implement interventions to support start-ups and SMEs, and articulate skills need of employers • Ensure visibility and awareness within industry of relevant funding sources and serve as a broker between these funding sources (EU,Technology Strategy Board, etc) to gain a bigger share for Wales.	• Ensure that businesses in Wales have access to a talent pool with the right ICT skills to meet their current and future needs; • Contribute to the development and implementation of procurement policies to ensure that ICT procurements consider the benefits for Wales and Welsh companies • Encourage ICT businesses to internationalise and take advantage of opportunities in overseas markets and attract high value-added businesses to the

Sector	Relevant Strategic Priorities		
	Short Term	**Medium Term**	**Long Term**
			sector in Wales.
Life Sciences	• Continue to develop BioWales and to support networks and collaborations in Wales, especially those with international awareness and connectivity • Develop proposals for an integrated Life Sciences Hub • Continue to speed up the delivery of existing programmes of support for innovation and business growth • Increase support for international trade and inward investment programmes.	• Establish an integrated Life Sciences Hub • Establish an accelerator programme for innovation in Life Sciences and Health, which is integrated with government funding programmes and which delivers an investment pipeline to commercial investors • Deliver a strong international marketing and communications programme.	• Demonstrate significant growth in the sector in Wales and increased private investment into the sector. Improve the international recognition and reputation of Wales as a Life Sciences cluster.

Source: Welsh Government, 2013

Draft Planning (Wales) Bill (December 2013)

2.50 The Welsh Government's objective is to introduce a national, regional and local planning system for Wales which improves the existing system and creates culture change to enable the positive delivery of appropriate development. This requires changes to primary legislation in the form of a draft Planning (Wales) Bill along with secondary legislation, policy (including a National Development Framework which will replace the existing Wales Spatial Plan) and guidance.

2.51 Primary legislation in the Bill, if agreed, would be amended to enable a joint planning board to prepare an LDP for multiple local authority areas, and ultimately produce a Joint LDP based on evidence of the issues that need to be addressed. This could include employment requirements within a travel to work area.

2.52 The Bill also looks to establish a system of Strategic Development Plans (SDPs) to address issues of greater than local importance. Strategic elements of LDPs, including employment should be elevated for discussion and conclusion in a SDP. SDPs should only be prepared in areas where there are matters of greater than local significance.

2.53 In consultation documentation the A55 Corridor is provisionally identified as one location where it would be appropriate to develop a cross-boundary SDP. Further detail is not provided but it is assumed that such and SDP would look at the economic linkages between strategic sites (employment and housing) in Flintshire (Deeside, Warren Hall, etc.) with equivalent locations along the A55, west to the port area of Holyhead, Anglesey. It is not clear if Wrexham, which sits some distance from the A55 itself would be included although given clear economic linkages across the North Wales area it is assumed it would have some role.

City Regions Final Report (2012)

2.54 This report publicises the findings of the Welsh Government's City Regions Task and Finish Group, which met in 2012. The objective of the Task Group was to determine: *"whether a city region approach appeared likely to deliver more jobs and greater prosperity in and for Wales than current approaches to economic development."*

2.55 After detailed research this report did **not** recommend a city region covering North East Wales/West Cheshire. The justification for this was that *"while traffic flows are*

clearly interdependent, the region as a whole would only just reach minimum critical mass [for city region status] *of 500,000, the appetite for a city region approach was* [found to be in consultation undertaken for this study] *patchy and while the business community in north east Wales has a great deal in common with its counterpart on the English side of the border, social and cultural connections are generally weaker."*

2.56 Recommendation 4 of that task group was that: *"everything possible is done, by concerned local government and, where necessary, the Welsh and UK Governments, to strengthen the Mersey Dee Alliance as a regional strategic body and give it the powers it needs to deliver sustainable growth in jobs and prosperity in north East Wales."*

Regional

North Wales Regional Employment Land Strategy: Strategy Document – North Wales Local Authorities (2014)

2.57 The Strategy covers the whole of North Wales and supports spatial development at both the regional and sub-regional levels. It has been developed in order to support key sector growth across the region and provides an overarching framework for investment. The Strategy considers trends and forecasts in the key sectors across the North Wales region, reviews the strategic land portfolio and considers how this portfolio will meet demand over the strategy period.

2.58 Within the Strategy, reference is made to certain geographies where sector investment may be particularly strong (e.g. advanced manufacturing in the North East). However, the focus is ensuring these strengths lead to wider benefits for the region as a whole.

2.59 *It should be noted that the following paragraphs represent views expressed in this North Wales Regional Employment Land Strategy only. They do not necessarily reflect the findings of this Joint ELR the views of WCBC, FCC or other relevant bodies.*

2.60 Advanced materials and manufacturing maintains its position as one of the most important sectors in North Wales with a diverse business base across North Wales. Six of the 12 companies in North Wales are included on the Welsh Government

Anchor list. Of these six, five are from the study area and includes Airbus (Aerospace); Toyota Motor Manufacturing (Automotive); JCB Transmissions (Automotive); Tata Steel Europe (Manufacturing); United Paper Mills (Manufacturing). Of particular reference, the Advanced Manufacturing Centre proposed as part of the Deeside Enterprise Zone is one of three programmes in North Wales which seeks to further strengthen this sector and support growth moving forward.

2.61 The super prison in Wrexham will lead to significant construction employment and training opportunities for the region. This sector is likely to generate demand for land for office support functions (e.g. storage) rather than demand for strategic sites.

2.62 The creative industries sector, whilst focussed in South Wales, also has a clear role within North Wales. The vision for the sector is to create a good business base which may attract larger investors while also including many companies that may require flexible business space across the region.

2.63 The Strategy recognises the position of Sharp Manufacturing Company in Wrexham as a Welsh Government Anchor Company and a leading energy based company (although the Wrexham plant no longer manufactures solar panels). Welsh universities offer a range of courses specific to the needs of the energy and environmental sectors with long-term industrial linkages. Glyndwr University's Centre for Solar Energy Research is one such example. Swansea University is also active in North Wales, supporting the operation of the Sustainable Building Envelope Centre at Tata Steels Shotton site.

2.64 Financial and Professional Services is one of Wales' largest and fastest growing sectors. North East Wales has had some success attracting firms including Moneysupermarket.com, which originated in Flintshire and Avox. With advancements in physical and digital infrastructure in Wales and planned role out of high speed broadband by 2015, this sector has the potential to continue to grow within the region.

2.65 The region contains a number of key companies within the food and farming sector and has seen a number of recent investments. Farmers Boy in Deeside invested heavily in their facility in 2012 and The Village Bakery in Wrexham invested in its

production line in 2013. Two Sisters Food Group also has bases in Deeside and Llangefni and is a subsidiary of Boparan Holdings who are included on the Welsh Government Anchor Company list.

2.66 The North Wales region contains a number of key employers within the life sector including ConvaTec Ltd in Deeside and Nice-Pak International, Flint. Alongside its development and manufacturing facilities, ConvaTec also has its global research and development for wound care products in North Wales. In order to support the sector the Welsh Government announced the £100 million Life Sciences Investment Fund in 2012 which seeks to invest in Life Sciences and related medical, pharmaceutical and healthcare companies in Wales.

2.67 Between 2013 and 2031 employment numbers across all sectors is forecast to grow by 3,401 in North Wales. The data shows that the growth is being driven by the construction, tourism, energy and environment and creative industries sectors. Employment decline is predicted to occur most heavily in the advanced materials and manufacturing and life sciences sector with a projected loss of 6,300 jobs and 1,000 jobs respectively.

2.68 Median scenario forecasts to 2031 reveals fairly low growth within the nine key sectors requiring an additional 46.3 ha of employment land across North Wales and a predicted growth in jobs across all sectors of 918. When considered in terms of jobs within the B use classes the forecast shows a negative growth of -2,115 jobs.

2.69 The Strategy employs a high growth scenario which shows a requirement for 55.61 ha to 2031, reflecting a greater demand in certain key sectors in which strategic projects and programmes are likely to influence investment decisions e.g. Enterprise Zones. In this scenario a predicted additional 3,991 jobs will be created to 2031, a growth rate of 249/year across the region within priority sectors. When looking at the proportion of these jobs in B use classes, the high growth scenario leads to an additional 197 jobs.

2.70 The analysis therefore shows limited demand for strategic employment land across the region suggesting that efforts across North Wales should be placed on ensuring that a small portfolio of strategic employment sites are identified to meet the needs of future investment.

2.71 The Strategy concludes that the North Wales economy has an adequate provision of employment land to meet the needs of strategic investor.

2.72 It is important to recognise that the Regional Employment Land Strategy has a very different focus from this study and that the two are not therefore readily comparable. The Regional Employment Land Strategy, for example, looks at land needs in nine key sectors:

- Advanced materials and manufacturing
- Construction
- Creative Industries
- Energy and environment
- Finance and professional services
- Food and farming
- ICT
- Life sciences
- Tourism.

2.73 Some of these sectors, such as advanced materials and manufacturing will be strong in Wrexham and Flintshire. Others such as life sciences have a more limited role in the economy of the sub-region. Regardless, however, this Joint Employment Land Review considers the whole industrial, warehouse and office based economy of Wrexham and Flintshire and does not limit itself to any specific sectors. This more holistic approach is likely to generate higher demand figures, for the simple reason that it is considering the needs of more of the local economy.

2.74 In addition, the jobs forecasting analysis (which as discussed, only considers jobs change in the nine sectors) uses a net forecast level only, i.e. it predicts that five sectors, which are predicted to grow, and which will provide growth of 8,708 new jobs across North Wales to 2031. However, it then takes away 7,790 jobs from four other sectors predicted to decline (particularly advanced manufacturing) leaving a net jobs figure of only 918 jobs to be converted into a land requirement (at a comparatively low development density of 3,000 sqm per hectare, compared to 3,900 sqm/ha in this study).

2.75 The Joint Employment Land Review does make a similar calculation (see Section

9.0), but also considers 'growth only' scenarios where only the needs of growing sectors are considered (under the assumption that declining sectors will not automatically be releasing land for other uses and should not therefore be included as a reduction in needs). It also considers if low growth projections reflect the reality of past experience, as expressed through previous take-up rates. Further scenarios that factor in the potential employment capacity in major projects in Flintshire have been provided to the County Council in separate advice.

2.76 On the supply side, it is also worth noting that The Regional Employment Land Strategy only considers the strategic sites on Wrexham and Flintshire. In Wrexham this includes Wrexham Industrial Estate (and only certain undeveloped sites within it), Llay Industrial Estate (again only certain sites), Ruthin Road and Wrexham Technology Park. In Flintshire this appears to include land at Hawarden, Deeside, Warren Hall and Mostyn Docks. The Joint Employment Land Review considers the local supply of land in both local authority areas and also reviews the supply position in strategic locations, such as Wrexham Industrial Estate, in much more detail.

Mickledore Sector Study – Mersey Dee Alliance (2012)

2.77 The report sets out a sector analysis of the Mersey Dee economy, a significant economic geography within the UK, supporting 30,000 jobs and over 27,000 registered companies. It was undertaken as part of a piece of work to understand the sectors which are important across the whole of the Cheshire, Warrington, Wirral and North Wales and has involved the completion of sector prepositions for UK Trade and Investment.

2.78 Recommendations of relevance to the ELR include:

- *Recommendation 1 – "The most important element of the Mersey Dee economy is advanced manufacturing. Flintshire and Wrexham generate a higher proportion of their economic output from manufacturing than anywhere else in the UK whilst Cheshire West and Chester has a larger absolute productive output than Flintshire and Wrexham. There is the critical mass to allow the formation of vertical supply chains involving production engineering, service and maintenance companies, packaging and transport. This is a clear differentiator for the area at a time when there is more discussion about the need for the UK to undertake more manufacturing activity. The alignment of promotional activity, land assets, financial incentives, skills training, R&D*

support, and supplier linkages for the benefit of manufacturing investment is rare in the UK and this proposition can attract further companies into the area. The number of advanced manufacturing inward investment projects into the UK is currently limited – but projects that do arise tend to be of high value and Flintshire (in particular) should be recognised as a natural contender on any company shortlist. The leading position of Flintshire and Wrexham in manufacturing should continue to be promoted strongly and widely especially as less qualifying regions start to promote themselves as advanced manufacturing locations."

- *"Recommendation 6 – Apart from in the business services sector, where there continues to be a strong flow of genuinely mobile potential inward investment projects, inward investment is increasingly difficult to attract. Inward investment is more likely to arrive as a result of company, supplier or customer linkages that are already in place within the region than as a result of speculative overseas promotional campaigns. An inward investment strategy is therefore more likely to be successful when built around these businesses. The strength of the advanced manufacturing sector and the number of international company interactions that must take place on a daily basis represent the most important 'multiplier' network for Mersey Dee. There is an opportunity to reinforce the knowledge and propositions of the area with local businesses. The Indian influence in the chemical industry is an important trend that should be explored with the companies involved with the potential for closer links."*

Mickeldore Sector Study – North Wales (2012)

2.79 This Study sets out a sector analysis of the North Wales economy. North Wales represents 22 percent of the economy of Wales, whilst the manufacturing sector represents over 30 percent of the manufacturing output of Wales. Almost 50 percent of the entire output is generated in Flintshire and Wrexham. These two areas derive more of their economic output from production activities than any other location in the UK (41 percent). Findings within this Study are the same as the Mersey Dee Alliance Study, discussed above. The Study proposes ten recommendations of consideration, of which Recommendation 1 and 6 of the Mersey Dee Alliance are carried forward. Alongside these, Recommendation 8 carries pertinence and states:

- *"The land and property resource in North Wales is becoming a significant differentiator in the attraction of investment. Historically potential inward*

investment clients generally assumed that land and property would be available whenever they had selected an appropriate location. This is increasingly no longer the case – England in particular has a relatively small number of very large scale commercial sites. There is the opportunity for property agents to market the sites of North Wales nationally as they are likely to represent a pressure release from land and property restrictions in England. The availability of these sites is also an important message for investment intermediaries".

West Cheshire North East Wales Sub Regional Study and Economic Perspectives (2004)

2.80 The purpose of the Sub Regional Study is to inform a wider piece of work to prepare a medium to long term strategy for the area, and to inform future strategic policy development in North West England and Wales. Although ten years old, elements of this Study are still relevant.

2.81 The Core Study area of the report comprises Flintshire, Wrexham, Ellesmere Port and Neston and Chester. A Wider Reference Area, was assessed which comprises the district/county borough boundaries of Denbighshire, Wirral, Halton, Warrington and the Vale Royal ward boundaries of Frodsham North and Frodsham South and Helsby.

2.82 The Study recognises the importance of Wrexham as a major regional centre and the principal urban centre in North Wales. Other strengths include the population growth of the sub-region, particularly in Flintshire and Wrexham, as well as the large supply of employment land at these locations.

2.83 There is an opportunity for key agencies to co-ordinate their approach to bringing forward employment sites for development across the sub-region to meet the needs of the cross-border target sectors – delivering sites for high level services in the short-term in Ellesmere Port and Wrexham, where short-term constraints in Chester exist; and delivering sites for mainstream and high tech manufacturing in Ellesmere Port, where short-term constraints in Flintshire and Wrexham exist.

2.84 There is also an opportunity for a co-ordinated approach to bring forward a range of sites in the medium and long term to meet the needs of the cross-border target

sectors including amongst others, Saighton Camp, Warren Hall, Northern Gateway (Deeside).

2.85 Wrexham and Flintshire have experienced the highest house price increase of the Core Study Area, with an insufficient supply of residential land to meet projected demand, particularly in Flintshire. Pockets of deprivation and unemployment are evident across the sub-region, with particular concentrations in Wrexham and Ellesmere Port. A particular weakness is that the supply of employment land is constrained by site readiness and the quality of sites available, particularly in Flintshire and Wrexham which has a high volume of land available in the short term.

2.86 Flintshire is absorbing the major movements of population, with the area having more than four times the migratory flows entering its boundaries compared to Wrexham. Economic projections of the Sub Regional Study indicate that the dominant economies in terms of job growth within the Core Study Area are Flintshire (in particular) and Wrexham and Chester. However, these areas are dominated by the economy of Warrington in the Wider Reference Area.

2.87 In terms of Labour Supply change, Flintshire dominates the growth in labour supply, with Flintshire and Wrexham dominating the percentage growth.

2.88 The Study recommends the area of The West Cheshire – North East Wales Sub Regional should be defined by the local authorities of Chester, Ellesmere Port and Neston, Flintshire and Wrexham, together with the inclusion of Denbighshire and Wirral where specific issues arise.

West Cheshire/North East Wales Sub-Regional Spatial Strategy and Strategic Environmental Assessment Process Report (2006)

2.89 The Report provides a non-statutory framework for greater cross-border co-operation and development between North East Wales and West Cheshire up to 2021. The Spatial Strategy sets out a broad vision that has been developed for the sub-region of a successful regional, national and global marketplace. Strengths of individual centres will be recognised to pursue economic growth, whilst realising social inclusivity and enhancing environmental limits.

2.90 Key spatial planning principles of relevance include:

- Reduce the need to travel within the sub-region through the careful location of housing, employment and retail
- Enhance the external competitiveness of the sub-region by building on existing successes and identifying future opportunities to widen the economic base
- Take proactive steps to improve the environment through the redevelopment of brownfield sites and major environmental improvements along the Dee Estuary.

2.91 Changes in the designation of the Assisted Areas in the sub-region have resulted in the loss of regional grant status in major towns like Wrexham and its key employment centres. The West Cheshire/North East Wales sub-region is not likely to escape the national curtailment of areas with Assisted Area status. This could affect not just the investor appeal – especially if areas close to its borders retain such uses – but also the ability of public sector organisations to take intervention actions to promote growth and development.

2.92 Relevant economic priorities to be addressed include:

- *Raising the quality of the property offer, especially to meet the changing requirements of industry and commerce and the general move towards a service sector economy*
- *Increasing the availability of ripe, quality employment sites to match the economic priorities; and giving increased emphasis to the role of micro-businesses, indigenous growth and local supply networks.*

2.93 With some notable exceptions like Chester, there is an overall problem of low perception of the sub-region as an investment location. This is reinforced by the relatively weak investment yields evident in many parts of the sub-region. All of this impacts on the ability to attract private investment. However, as Deeside has demonstrated, viable development – without grant support – can be achieved with the right strategy and the right product for the marketplace.

2.94 Recent trends and market evidence of the time suggests:

- That ‘new’ greenfield inward investments are likely to be much smaller in scale then in the past couple of decades – and most of these investments are likely to be in the service sector

- Prospects for new large-scale manufacturing investments face tough competition from other part of the UK, mainland Europe, and the rapidly growing economies of China and India
- There are likely to be both significant opportunities and challenges for attracting re-investments (in both the manufacturing and service sector)
- As competition increases, the sub-region must inevitably focus increasingly on higher value added activities and services
- The investor offer – both for attracting new 'greenfield' investments and for harnessing re-investments – must be increasingly upgraded to reflect the new market conditions. This applies especially to the regeneration areas within the sub-region
- There will be an increasing need to encourage investment and job opportunities from indigenous companies and firms within the sub-region, but again recognising that, especially for the larger scale investments, competition with other parts of the UK and other countries is often involved.

2.95 The Sub-Regional Spatial Strategy supports the sustainable growth of four strategic centres of Chester, Wrexham, the Deeside conurbation and Ellesmere Port. There are various issues and constraints facing each of the four centres, but for Wrexham the following are described:

- Balance between developments in Wrexham and its hinterland
- Continuing role of Wrexham as a major manufacturing centre
- Definition of its developing role in higher education and regional health services
- Further development of Wrexham's role as an important retail centre for North Wales and adjoining areas. Consideration of green barrier implications.

2.96 For Wrexham's regeneration areas the priority is to improve access to employment opportunities, rather than trying to direct business investment to areas which are unlikely to be attractive to business development, even assuming development land was available. The Strategy also continues to develop Wrexham's role as an important retail centre, as well as mitigate the increased pressure for housing.

2.97 The successful economic restructuring and repositioning of the Deeside area – across a wide range of manufacturing and related service activities – has firmly established Deeside as a major, modern employment centre. There are, however,

environmental sensitivities to be aware of and protect, for example, flooding and internationally important nature conservation sites.

2.98 For Deeside the promotion of strategic sites such as the Northern Gateway which will accommodate a wide range of land uses to promote sustainable development including housing, employment land (predominately for B8 uses, supported by B1 and B2 uses) community, education, health and leisure facilities will be supported. Flintshire's coastal towns also have significant local retail and service functions to be developed as part of regeneration proposals. An important initiative in the strategy could involve the creation of strategic mixed use sites able to accommodate a mix of housing and employment.

2.99 A policy framework supporting the Spatial Strategy is described within the document and includes the following relevant policies:

- 'Policy ENV3 Brownfield land' – local authorities to be encouraged to identify and re-assess the potential of brownfield sites. The future role of such sites to be determined, together with actions necessary to achieve that role, within the context of a comprehensive review of brownfield land opportunities across the sub-region
- The Sub Regional Strategy allocates, through 'Policy H1 Scale and Distribution of New Homes', approximately 30,000-35,000 new dwellings to 2021, with Wrexham providing 6,000-7,000 dwellings and Flintshire contributing to 6,500-7,500 dwellings
- 'Policy ECON1 Review of Existing Employment Sites' encourages a reassessment of employment land for local authorities within the sub-region, to consider where appropriate its continuing relevance to employment uses. This should include a reconsideration of existing land allocations for large scale, single user inward investment sites. Where relevant, appropriate alternative uses for sites should be identified, subject to compatibility with other planning policies. Sites in active use could also be reviewed to see if they can redeveloped or upgraded to maximise their potential and flexibility, as this may reduce pressure of new greenfield development. The re-assessment should embrace:
    - The time period over which the land has been allocated for development but not taken up by prospective developers/investors
    - The constraints (and costs) of development

- The degree of interest expressed in developing the land

- Policy ECON2 Employment Sites states local authorities should work together to identify the strategic employment sites across the sub region. Key actions in Wrexham and Flintshire should be focused on the following:
  - Wrexham Western Gateway – the expansion of Wrexham Western Gateway as a strategic employment site may not be needed to support the continuing development of Wrexham as a major centre in the sub-region. However further investigations should first take place into the need for additional land allocations, their environmental and landscape impacts, and whether there are more suitable locations in Wrexham
  - Northern Gateway, Deeside – to serve as a natural extension to Deeside Industrial Park, which now has very little opportunity for development, but to also accommodate a wider range of land uses to promote sustainable development. Sites in these areas have the potential to impact on sites within the Ramsar and Natural 2000 Network. Development will only be permitted if the provisions of Policy ENV2 are satisfied
  - The re-use of brownfield sites within town and city centre should be maximised with emphasis on the main settlements of Chester, Ellesmere Port and Wrexham
- ECON 2a – In taking forward any of the strategic sites identified within this Strategy, it is essential that detailed environmental appraisals and/or capacity studies are undertaken on a site by site basis to ensure that there are no significant adverse environmental impacts, particularly on sites within the sub-region protected by European designations. In particular, appraisals should be focused on ensuring that only appropriate land-uses are taken forward for each site.

North Wales Local Authorities – Economic Ambition: A Strategy for Change (2014)

2.100 The vision of this report is that North Wales will become *"A confident and outward looking region with a diverse and high value economy providing a range of quality employment opportunities for its people."* This is a statement of intent, not a detailed strategy. The report details a common strategic agenda to guide interventions focused on the key economic development constraints and opportunities facing North Wales as a whole.

2.101 Key economic challenges in North Wales are identified to include:

- *"An unbalanced economy with an over-dependence on the public sector*
- *Few larger firms or corporates and more limited employment opportunities*
- *Low productivity and earnings*
- *The out-migration of younger often more qualified people*
- *High levels of economic inactivity."*

2.102 More recent challenges, emerging from the recent recession include:

- *"Low levels of growth and job creation*
- *The squeeze on disposable incomes and associated falls in retail and consumer services spend*
- *Weaknesses in construction, housing and property markets*
- *The consolidation in the service sector*
- *High levels of youth unemployment*
- *Cuts to public spending."*

2.103 In comparison, the identified opportunities are:

- *"Depreciation of sterling and improved competitiveness of manufacturing*
- *The strong presence of advanced manufacturing in the region, including the investment by Airbus at Broughton*
- *The major investment in a replacement nuclear reactor at Wylfa*
- *The development of low carbon technologies and 'Energy Island' plans*
- *Developing and enhancing connectivity through improved broadband access and key infrastructure projects*
- *Tourism and potential for growth in overseas and domestic visitors linked to changing economic circumstances."*

2.104 The principal outcome required is to increase "productivity, competitiveness and growth". This will be measured by reducing the gap between the regional and national annual growth rate in GVA and the gap between those areas which are lagging behind the regional average growth rate and those performing more strongly. There are four major issues that will need to be addressed to deliver the principal outcome. These issues and the activities required to address them are set out in Table 3

Table 3 – Economic Ambition: A Strategy for Change – Issues and Actions Summary

Strategic Issue	Action Programmes
1. Economic leadership	• Intelligence on the economy and key sectors • Clear, strategic focus • Capacity to deliver • Exploring opportunities to resource regional development including European funding • To develop and foster relationship with regional partners and deliver a 'Team North Wales' approach.
2. Rebalance the economy to increase growth and productivity	• Supporting businesses and social enterprises to realise their growth aspirations • Information & signposting • Encouraging inward investment • Supporting new start-ups • Develop key sectors including advanced manufacturing, LCT, tourism, creative • Supply chain support & development • Promoting entrepreneurship, innovation and leadership.
3. Address peripherality & improve our infrastructure	• Improving broadband access to ensure North Wales is digitally well connected • Infrastructural improvements to encourage business growth and expansion • Exploiting opportunities to develop a low carbon economy • Advise and support communities and businesses to maximise the benefit of high speed digital services.
4. Upgrade the skills base, reduce inactivity & tackle youth unemployment	• Skills workforce development • Addressing co-ordination 'failures' • Improved labour market planning • Tackling youth unemployment • Effectively targeting & tackling deprivation • Building links across to health and education

Source: North Wales Local Authorities, 2014

Local (Wrexham County Borough Council)

Unitary Development Plan 1996-2011

2.105 Until the time the LDP is adopted, Wrexham's UDP is the adopted development plan for land use decision-making.

2.106 The UDP provided a significant amount of employment land at a variety of locations

to ensure sufficient potential for inward investment, service sector diversification and the expansion/relocation of existing businesses. At the time the UDP was adopted, this amounted to 114.0 ha (see Table 4, below) of which 65.4 ha (57 percent) was in Wrexham Industrial Estate. As of March 2014, following some 13 years of take-up, this allocated supply had reduced to 67.37 ha, of which 36.36 ha (54 percent) is in Wrexham Industrial Estate. The current status of Wrexham's employment land supply is discussed fully in Section 6.0.

2.107 The UDP indicated the need to prepare Development Briefs for allocated sites where it is appropriate to do so. For example, a development brief was prepared for the major development site at Ruthin Road, Wrexham where land was allocated for housing, employment and education. This site, now referred to as the Western Gateway, is discussed further in Section 6.0.

2.108 Through Policy EC16, the Council was committed to reclaim and restore derelict sites. This included Brymbo Steelworks, where reclamation has now taken place and housing development has been completed. 8 ha remains available for employment development.

2.109 Policy EC17 established a landscape buffer zone to remain free of built development between the Pentre Maelor housing estate and Wrexham Industrial Estate. This policy compliments Policy E8, which safeguards the land between Pentre Maelor and Clywedog Road (South) for Businesses Use only.

2.110 The UDP endorsed a Regeneration Strategy and Action Plan for the Bridge Street/Cambrian Yard area of Wrexham. Through Policy H13, the 4.73 ha site was be developed to include residential development, B1 Use development and shopping provision for local needs. This site is expected to remain protected in the emerging Wrexham LDP for a comparable mix of uses. A further site at the former Carlsberg Tetley Brewery in Wrexham was safeguarded for mixed uses comprising housing, employment and leisure (Policy H14). This site has now been developed for a scheme which included retail uses.

2.111 At the time of adoption, the UDP highlighted a number of issues faced by the Wrexham local economy:

- Less mobile investment available, and greater competition from other parts of

the United Kingdom and other countries

- Loss of all assisted area status
- Pockets of severe unemployment and deprivation, especially in the urban villages to the west of Wrexham
- Commuting to centres of employment outside the County Borough, leading to monetary leakage
- Low economic activity rates and an increasingly dependent population
- Over-reliance on manufacturing, leaving the economy increasingly vulnerable to external decision-making.

2.112 Policy E1 allocated land for employment development between 2001 and 2011, as shown in Table 4. As noted above the 114.0 ha supply has now decreased to some 67.37 ha.

Table 4 – Employment Allocations

Policy E1 Employment Allocations		
Wrexham Industrial Estate		
Ref Number	**Location**	**Area (ha)**
1	Abbey Road	1.4
2	Abenbury Way	1.7
3	Ash Road South (i)	2.6
4	Ash Road South (ii)	7.3
5	Ash Road South (iii)	0.8
6	Bryn Cottages	3.6
7	Bryn Road	9.5
8	Clywedog Road North	1.9
9	Clywedog Road East	2.2
10	Clywedog Road South (i)	3.3
11	Clywedog Road South (ii)	5.0
12	Clywedog Road South (iii)	6.5
13	Coed Aben Road	2.6
14	Dunster Road	1.5
15	Maelor, Bedwell Road	2.9
16	Redwither (i)	2.1
17	Redwither (ii)	0.9

Policy E1 Employment Allocations		
18	Redwither (iii)	2.10
19	Redwither (iv)	0.9
20	Redwither (v)	3.3
21	Ridley Wood Road	3.3
Wrexham Industrial Estate Sub Total		**65.4**
Other Sites		
22	Acrefair: Wynnstay Industrial Estate	1.4
23	Gresford: Industrial Estate	1.1
24	Johnstown: Vauxhall Industrial Estate	2.5
25	Llay: Industrial Estate (i)	3.3
26	Llay: Industrial Estate (ii)	2.9
27	Llay: Industrial Estate (iii)	0.4
28	Llay: Industrial Estate (iv)	1.4
29	Llay: Industrial Estate (v)	1.2
30	Llay: Industrial Estate (vi)	0.8
31	Llay: Industrial Estate (vii)	7.5
32	Rhosllannerchrugog: Coppi Industrial Estate, Hall Lane	0.4
33	Rhostyllen: Croesfoel Industrial Estate	1.3
34	Rhosymedre: Plas Kynaston	0.6
35	Wrexham: Pandy Industrial Estate	1.1
36	Wrexham: Queensway Industrial Estate	0.5
37	Wrexham: Rhosddu Industrial Estate	1.7
38	Wrexham: Technology Park	5.3
39	Wrexham: Ruthin Road Development Area	15.2
Other Sites Sub Total		**48.6**
Total		**114.0**

Source: Wrexham County Borough Council, 2006

2.113 The identified employment land requirement for the period 2001-2011 was 254 ha, with allocations of 114 ha and land with extant planning permission at 138.3 ha. The current employment land supply picture is set out in Section 6.0.

2.114 Policy E2 allocated land for established high quality employment development comprising high technology, manufacturing, research and development, and prestige

offices at Wrexham Technology Park (5.3 ha, now developed) and Ruthin Road Development Area (now Western Gateway – 15.2 ha, now 8.83 ha).

2.115 Land was allocated at [former] Owens Corning Fibreglass, Wrexham Industrial Estate for a major single user employment project that requires a site of over 30 ha for an employment that cannot be accommodated on allocated land with planning permission (Policy E3). The present status of this site is discussed further in Section 6.0.

2.116 Although technically the UDP is out of date, in the absence of a revised development plan, it remains alongside national planning policy, the principal document against which development management decisions are made.

Wrexham Employment Sites Study (2007)

2.117 The report is an appraisal of 64 employment sites within Wrexham identified through UDP employment policies or suggested by the Council as suitable for employment. It was undertaken to inform the (now withdrawn) LDP. The key conclusions and employment land requirements identified by this study are summarised below.

2.118 The detailed assessment identified that 114 ha of allocated employment land was available for development as at 1st March 2007 and a further 96 ha of identified land was suitable for employment available for non-allocated sites. The vast majority of the available employment land is located on Wrexham Industrial Estate.

2.119 68 ha of land on 11 sites was classified as being of low constraint. The majority of available land was classed as having medium constraints, comprising 23 sites on some 124 ha of land.

2.120 A number of principle recommendations were identified in order to create an employment land offer which would facilitate economic growth within Wrexham. Some of the recommendations are not ones that can be included within a development plan, but could be explored and implemented by other departments within the Council:

- Begin to re-structure Wrexham Industrial Estate through zoning and to raise the profile to attract better quality development
- Look to assist in facilitating the creation of further employment land in Llay

Industrial Estate as a complimentary offer to the Wrexham Industrial Estate and build upon its favourable location in the north of Wrexham and proximity to Chester

- Seek to create a Property Workshop type mechanism to create better dialogue with developers, agents and Welsh Assembly Government
- Look to ensure that economic opportunities are linked to local labour, therefore encouraging development on sites in for example the Llay Industrial Estate or in close proximity to other urban areas and/or public transport networks
- Continue to place emphasis for future development on sustainability particularly in those developments which are aiming to improve the higher end offer within Wrexham
- The success of the Western Gateway, Wrexham Technology Park Phase III in delivering sustainable development to the market should be used as an opportunity to establish momentum in delivering against high level sustainability benchmarks
- Explore further future potential sites along the A483 which could offer longer-term development potential for a business park, located to the north of Wrexham. In identifying these sites consideration must be given to access by public transport. The requirement for these sites should be based on the level of take-up within Wrexham Gateway, Wrexham Technology Park Phase III which should be carefully monitored by the Council.

Wrexham Western Gateway Project

2.121 The Western Gateway is a long term development project driven by the Council, in partnership with other organisations. Its long term objective is to build-out Wrexham Technology Park into its third phase. The intention is for the Western Gateway to become a flagship scheme, consisting of a 'green' or 'eco' business park with the focus on sustainability and high environmental credentials. Project aims amongst others include: some 8 ha of new business park space with BREEAM excellent offices and 7 ha of new housing.

Wrexham Council Plan 2014 to 2017

2.122 The Council Plan is the overarching plan for the Council defining where energies and resources will be focused. The Council Plan sets out three strategic themes – Economy, People and Place – and a corporate theme of Organisation – striving for

excellence. Outcomes to achieve a vibrant, diverse and inclusive Economy include creating a place where:

- People want to live, work, learn, visit and invest (E1)
- Business can locate and grow (E2)
- People can prosper as individuals and in their communities (E3).

2.123 For E1, the Council will secure enough of the right land or buildings to attract high quality employment opportunities with premium employers. For E2, the Council will monitor success by sustaining their number of new businesses assisted by the them; improve the percentage of council lettable commercial property occupied; improve the number of qualified investment enquiries; improve the number of registered businesses; and, improve the number of jobs created. This will be achieved by a number of actions including providing commercial property that meets the needs of indigenous business, New Start businesses and potential inward investors.

Our Wrexham Plan 2013-2024

2.124 The proprieties of this plan for the work of the Wrexham Local Service Board (LSB) are:

- *"Making Wrexham a place where people can live independently and are healthy and active.*
- *Making Wrexham a place with a strong, resilient and responsible economy (make money, but do the right thing).*
- *Making Wrexham a place that's safe and where everyone feels included."*

2.125 In the context of the second priority, the plan sets out a number of very broad goals, specifically that by 2024, more people will:

- *"Feel Wrexham town centre is a happening place. Modern. Full of energy.*
- *Have confidence in Wrexham County Borough. As a place to live, work, learn and visit*
- *Visit here and spend money.*
- *Achieve their potential.*
- *Have a Certificate of Higher Education or equivalent."*

2.126 There will be more:

- *"New businesses starting up or locating to Wrexham County Borough*

- *Quality, long-term jobs*
- *Households in Wrexham County Borough with sufficient income.*
- *Access to learning and well-paid jobs*
- *High quality, affordable childcare*
- *Access to Broadband and Wi-Fi*
- *Graduates living and working here.*
- *Support to help businesses adapt to economic change."*

2.127 Relevant goals for the Wrexham LSB, indicated that the LSB will endeavour to:

- *"Encourage entrepreneurs and support new businesses across the County Borough*
- *Nurture social enterprises and help 'third sector' organisations – like charities and community groups – adapt to change*
- *Help communities tap into learning and business opportunities.*
- *Provide more opportunities to learn employment skills.*
- *Make best use of land across Wrexham by getting our Local Development Plan spot-on."*

Withdrawn Local Development Plan (2010)

2.128 Wrexham's LDP went to Public Examination in January 2012. However due to concerns raised by the Planning Inspectorate the hearing session was suspended. Housing, affordable housing, gypsy and traveller provision were particular concerns raised by the Inspector, but other issues of pertinence to this ELR include:

- The Plan's approach to growth in the employment and retailing sector did not reflect the Wales Spatial Plan's desire to see the strengthening of Wrexham as a key hub
- Concern that the allocation of employment land has not sought to meet the likely future demand from the high technology sector which has been identified as having the greatest potential to grow
- Concern that the envisaged scale of growth in the employment sector may be hampered by the limited pool of suitably skilled workforce that would be likely to result from the Plan's more restrictive approach to housing growth
- Concern that the proposed imbalance between the scale of employment and housing growth may lead to employees commuting into the County to work, thus limiting the economic benefits to the area and increasing car borne

journeys.

2.129 The Inspector demonstrated the LDP to be unsound, and as a result WCBC withdrew the Plan. The withdrawn LDP however, contains information on employment sites which were at the time considered suitable to take forward for allocation together with industrial areas that were considered appropriate for protection for employment purposes, and are discussed below.

2.130 Key elements of the spatial strategy relevant to the provision of employment land included:

- Maximising the use of previously developed, under-used or vacant land
- Confining development to existing settlement limits
- Focussing investment to Wrexham and the Wrexham Industrial Estate to enhance its role as a key hub in the North East Wales/West Cheshire sub-region
- Directing some development to Western Villages currently experiencing social and economic deprivation and physical decay
- Restricting new development within other settlements, mainly in the Rural Hinterland
- Providing for an appropriate level of strategically significant employment land with good accessibility to the A438(T) and smaller local employment areas in the Western Villages and accessible to rural communities.

2.131 Policy SP6, provision of employment land, safeguarded 120 ha of employment land between 2006 and 2021 on existing employment areas. Policy P17 described the allocations in detail, with Wrexham Industrial Estate containing 88.7 ha; Pandy Industrial Estate containing 0.6 ha; and the Western Villages with 31.3 ha.

2.132 Mixed use regeneration opportunities (Policy P2) included the Wrexham Street/Cambrian Yard Area of Wrexham; the former Groves School site, Powell Road, Wrexham; and the former Flexsys and Air Products sites, Cefn Mawr – all with some form of employment development.

2.133 Policy P18: High Quality Sites for Manufacturing/Office/Research Uses safeguarded Land at Western Gateway and Wrexham Technology Park for high quality employment development comprising high technology, manufacturing, research and

development, and prestige offices as defined by B1 Use Class.

Wrexham's Economic Prosperity Strategy 2012–16

2.134 The Economic Prosperity Strategy outlines the importance of regeneration within Wrexham. The Strategy re-evaluates the economic circumstances and conditions affecting the County Borough, the expectations of partners and communities, and looks at the need to evolve services and objectives to match. There are four main priorities towards achieving economic prosperity within Wrexham:

- Investment
- Employment
- Wealth
- Quality of life.

2.135 Investing in the County Borough is defined as:

- Securing enough of the right land or buildings to attract high quality employment opportunities with premium employers
- Capitalising on the potential of tourism assets to encourage visitors to stay longer and spend more
- Reducing the number of vacant/void town centre premises and increasing footfall
- Conserving and regenerating key buildings to raise the overall quality and feel of the infrastructure and public realm within the County Borough.

Local (Flintshire County Council)

Unitary Development Plan 2000-2015 (2011)

2.136 Until the time the LDP is adopted, Flintshire's UDP is the adopted development plan for land use decision-making. A key objective of the UDP is to maintain a high and stable level of economic growth and employment for the County. As part of this Policy STR3 Employment facilitates:

a. "the provision of 300 ha of employment land over the Plan period;

b. the provision of a range of type and size of employment sites;

c. enabling new employment generating development mainly within or adjoining existing settlements, in principal employment areas, development zones, or allocated sites and suitable brownfield sites and through the sensitive conversion of rural buildings and other appropriate rural diversification

initiatives;

d. existing employment sites and buildings being retained, where necessary and practicable, for that use; and

e. appropriate expansion of existing firms and businesses."

2.137 Policy EM1 identifies sites allocated for general employment under B1, B2 and B8 Use Classes:

Table 5 – Policy EM1 General Employment Land Allocations

Site	Settlement	Area (ha)
Chester Aerospace Park	Broughton	15.5
Manor Lane/Hawarden Park Extension	Broughton	18.2
Mount Pleasant Road (north)	Buckley	2.0
Land North of Buckley Station	Buckley	0.6
Drury New Road	Buckley	1.4
Chester West Employment Park	Chester	1.3
Former Power Station	Connah's Quay	12.8
Crumps Yard, Dock Road	Connah's Quay	4.0
Deeside Industrial Park, Phase II	Deeside	11.6
Land to North of Shotton Paper	Deeside	24.0
Land to East of Shotton Paper	Deeside	32.0
Land to North West of Garden City	Deeside	98.0
Greenfield Business Park, Phase I	Greenfield	1.3
Greenfield Business Park, Phase II	Greenfield	6.1
Greenfield Business Park, Phase III	Greenfield	6.4
Greenfield Business Park (III) Extension	Greenfield	6.6
Broncoed Ind. Est.	Mold	1.1
Mold Business Park	Mold	5.3
Adjacent Mostyn Docks	Mostyn	4.5
Expressway Business Park	Queensferry	0.7
Chester Road East	Queensferry	3.8
Antelope Ind. Est.	Rhydymwyn	1.1
River Lane	Saltney	2.2
Land East of Saltney Ferry Road	Saltney	14.6
Prince William Avenue	Sandycroft	1.8
Rowley's Drive	Shotton	1.8
Total		**278.7**

Source: Flintshire County Council, 2011

2.138 The following sites, through Policy EM2 High quality Site Allocations, were safeguarded as high quality employment sites for the location of B1 Uses:

Table 6 – High Quality Employment Land Allocations

Site	Settlement	Area (ha)
Warren Hall	Broughton	36.5
DARA site	Sealand	18.5
St David's Park	Ewloe	2.2
Mold Business Park Extension	Mold	5.0
Total		**62.2**

Source: *Flintshire County Council, 2011*

2.139 The following summarises the employment land provision in the UDP:

- UDP employment land need = 300 ha
- current allocations rolled forward = 294 ha
- new allocations = 47 ha
- total allocations = 341 ha
- of which, land held by companies for expansion/not generally available = 32 ha
- balance of allocations generally available = 309 ha

2.140 Of particular relevance to this ELR is the strategic mixed use development Land North West of Garden City which occupies a strategic location, adjacent to Deeside Industrial Park. A phased development programme of 98 ha of B Use Class employment land will be delivered alongside circa 20-25 ha of residential land, as well as community and leisure facilities.

Deeside Enterprise Zone: An Engine for Regeneration and Growth

2.141 The report identifies Flintshire as a most manufacturing-dependant local authority area in the UK. Deeside Enterprise Zone (DEZ), a 2,145 ha area, supports and maintains this position. There is potential for 202 ha of mixed use development of which 150 ha will be mixed office and general employment land.

2.142 The report states that DEZ will focus around advanced manufacturing, aerospace engineering, electronic, construction and sustainable energy. A goal set by the DEZ is to become the first carbon neutral enterprise zone/business park in North Wales. As well as this, DEZ will help ten companies to export every year, focusing on markets worldwide both for trading and inward investment purposes.

2.143 Deeside Industrial Park employs circa 9,000 jobs on site, with Airbus at Broughton believed to be the single, largest employment site in the UK, with 6,500 jobs. Northern Gateway, at 200 ha is the largest mixed use development site in Wales, with planning permission and access to £70 million Enhanced Capital Allowances to support appropriate investment. This major scheme will bring an estimated 7,000 new jobs, create up to 1,300 dwellings and an Advanced Manufacturing Research Facility.

2.144 DEZ are committed to developing rent/buy options to support retention of key professional workers, and every building within the Enterprise Zone will benefit from high speed broadband.

2.145 A number of financial support and incentives are available including business rate relief to a total of 17 ha in area including older parts of the industrial park, and providing enhanced capital allowances.

Flintshire Improvement Plan 2013-2014 (2013)

2.146 Under eight key headings Flintshire has set a number of priorities for 2012 to 2017. The environment priority states that:

- people should be able to access employment, local services and facilities
- development should be pursued according to the LDP to ensure sustainable development of land and resources.

2.147 Under economy and enterprise:

- growth should occur in Deeside, specifically Deeside Industrial Park and DEZ, through business sector promotion and the creation of jobs
- town and rural areas will be regenerated and will ensure local communities remain viable.

Employment Land Review (2009)

2.148 The report analysed the suitability of existing employment sites in the County and considered the need for new sites. The demand analysis suggested a quantum of land required annually of circa 15 ha. The employment sector from which most demand would arise electronics includes the automotive; software; financial; management and business services; life sciences; creative industries and the environment technologies sector. These sectors generally require sites of higher quality in business parks or superior industrial estate type locations.

2.149 The 2009 Review also found sufficient or even surplus, employment land exists in the area, but the specific type and quantity of sites may not be suited to the future demands of employers. The constraints in relation to the portfolio of higher quality sites are generally being addressed in the short to medium term, but longer term supply gives cause for concern.

2.150 It is understood that 54.8 ha of land is held by companies for their company expansion. Therefore most new investment projects are likely to involve the expansion of existing firms.

2.151 The supply of better quality sites in the short to medium term is adequate (110.3 ha), but longer term supply is less satisfactory (21.8 ha).

2.152 The overriding conclusion of the Review is that the area does not suffer from significant constraints on the immediate supply of those sites likely to be most attractive to the market, but that it does suffer from a shortage of the right kind of opportunity in the medium to long term.

2.153 The report recommends a possible further business park in the A55 corridor in Flintshire; an assessment of the options for a new business park in Chester to be undertaken by Chester City Council with FCC being a key consultee; and, smaller scale high quality sites should be sought in or adjacent to the towns of Mold and Flint.

Flint Strategy and Masterplan 2021 (2012)

2.154 The Flint Strategy and Masterplan sets out a route map for the transformation of Flint, building on its assets and overcoming its challenges. The wide range of local employment and business opportunities in the Town and good access to Deeside

Industrial Park, are but one of the opportunities that Flint should seek to enhance.

2.155 The new vision for Flint is to ensure the area is a "*local destination capitalising on its assets, especially its historic county market town and waterfront, and reassert its role in the region*." The vision is supported by six strategic objectives, and includes:

- To encourage economic growth through job creation - build upon Flintshire's economic success and create enhanced physical, business and environmental conditions to retain and attract businesses and retailers to Flint, thus generating momentum for local employment, spend and economic activity.

2.156 Flint Masterplan provides projects split between short, medium and long term time periods. A project within the long term (8-12 years) is to engage with local businesses and developers to create new employment space.

Buckley Town Centre Masterplan (2011)

2.157 Buckley is one of the largest town's in the County with a resident population of circa 15,000 people. The Buckley Masterplan pursues the highest priority of the Retail Healthcheck Study of 2008 which concluded that the convenience (food) retail offer needs to be strengthened through the provision of a new medium sized store in an appropriately central location. The Masterplan also addresses the wider retail offer and provides for improvement and investment across the whole centre.

2.158 The Masterplan notes the little office demand in Buckley given the availability of space in and out of centre business locations. This is reflected in the Masterplan Vision, which does not expand the town centre office provision, but focuses on the retail and leisure offer.

Community Strategy 2009-2019 (2009)

2.159 In October 2009, the Local Service Board signed off the Community Strategy as a 'county vision' for Flintshire between 2009 and 2019 to be used to shape the local authority's financial and business planning processing and community planning partners.

2.160 The County Vision is based on five priority areas:

- Economic Prosperity

- Health improvement
- Learning and skills for life
- Living sustainably
- Safe and supportive communities.

Summary

2.161 It is a responsibility of local government to support and encourage economic growth. This includes the provision, initially through planning policy, of sufficient employment land and premises. This must be of the right scale, type and location, be readily available for development and be well related to the strategic or local highway network according to the nature of the site and the function of the settlement. One of the most important issues to consider is that the land must be allocated in sustainable locations and be readily capable of development. The employment land portfolio needs to be balanced and to adequately cater to all sectors of the economy, i.e. small and large businesses, offices and industrial, high and low quality operations.

2.162 The Welsh Government also identifies nine key economic sectors for Wales:

- Energy and Environment
- Construction
- Creative Industries
- Advanced Materials and Manufacturing
- Financial and Professional Services
- Food and Farming
- Information and Communication Technologies (ICT)
- Life Sciences
- Tourism.

2.163 The importance of local authority collaboration is paramount, due to the cross-border links with the County's English neighbouring authorities, of particular importance the Mersey Dee Area consisting of Cheshire and Chester West and Wirral.

2.164 In the absence of a more up to date LDP, Wrexham's and Flintshire's UDP is the adopted development plan for both the Counties. Wrexham's UDP allocated 114 ha of employment between 1996 and 2011, which combined with some 138.3 ha of extant planning permissions gave a (then) supply total of 254 ha. As of March 2014,

following some 13 years of take-up, this allocated supply had reduced to 67.37 ha, of which 36.36 ha (54 percent) is in Wrexham Industrial Estate. Another 100.16 ha is presently available from other sources, giving a current land supply total of 199.73 ha as of 31st March 2014 (see Section 6.0).

2.165 Flintshire's UDP allocated 340.90 ha of employment land. However, development over the 2011-2014 period (which included the complete take-up of three allocated sites – EM1.6: Chester West Employment Park; EM1.9: Deeside Industrial Park, Phase II; and EM1.20: Expressway Business Park) has reduced that supply to 307.55 ha. Combined with unimplemented planning consents (18.58 ha on eight sites) gives Flintshire a total baseline land supply of 326.13 ha as of 31st March 2014 (see Section 6.0).

3.0 SOCIO-ECONOMIC PROFILE

Introduction

3.1 This section provides a summary profile of the prevailing social and economic conditions in Wrexham and Flintshire. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth. It also provides an important context for understanding economic demand/need, having regard to the wider regional and national economies.

3.2 This section therefore considers the size of the economy, where the businesses are, and what type of businesses they are. By appreciating these aspects it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together a number of existing data sources. It also uses demographic data to build the picture, given that there are no readily available answers to some of the key questions included within this section.

3.3 Local planning authorities should have a clear understanding of their performance against neighbouring areas, as well as sub-regional and national averages. Within this section, Wrexham and Flintshire is compared to the four other local authorities in North Wales:

- Anglesey
- Conwy
- Gwynedd
- Denbighshire.

3.4 Alongside Denbighshire, the two local authority areas of the Mersey Dee Area, Cheshire West and Chester and the Wirral are considered, due to cross border links and economic drivers on both sides of the Welsh border.

3.5 Where relevant, comparisons are also made to Wales as a whole.

3.6 Although this section does use some data from the 2011 Census, 2012-2013 statistics have also now been produced for a number of socio-economic categories. This section therefore utilises the most up to date data available on each subject.

Demographic Assessment

3.7 The population of Wrexham and Flintshire as of the 2011 Census was 287,350 residents, which was 41.7 percent of the total for North Wales (687,937). As Table 7 shows, Wrexham and Flintshire have the largest combined resident population in North Wales, but lower than their English neighbours.

Table 7 – Population

Area	Population	Proportion, percent (North Wales)
Anglesey	69,751	10.1
Conwy	115,228	16.7
Gwynedd	121,874	17.7
Denbighshire	93,734	13.6
Wrexham	***134,844***	***19.6***
Flintshire	***152,506***	***22.1***
Cheshire West and Chester	329,608	-
Wirral	319,783	-
Mersey Dee Area	1,030,475	-
North Wales	687,937	*99.8*
Wales	3,063,456	-

Source: ONS Census 2011

3.8 Comparison with the 2001 Census indicates that Wrexham's and Flintshire's population increased by 3.6 percent (from 277,070) over that period. This is a small increase compared to the North Wales growth rate (17.1 percent) and the Welsh national average (5.2 percent), over the same period (5.2 percent).

3.9 As of mid-year 2013 (ONS Annual Population Survey – Jan 2013 to Dec 2013), respectively, 74.0 percent and 72.7 percent of Wrexham's and Flintshire's working age population was in employment (65,700 and 71,300 residents, respectively). Both these are roughly equal to the Mersey Dee Area (72.3 percent), but above the North Wales and Welsh national total (71.4 percent and 68.9 percent, respectively).

3.10 As Table 8 shows, as of December 2013, unemployment in Wrexham and Flintshire combined (6.4 percent) was lower than in most of the neighbouring local authorities of the study area. Across the study area, only Conwy and Cheshire West and

Chester had a higher proportion of their economically active population in work. Indeed unemployment was also lower than the Welsh average (7.9 percent).

Table 8 – Unemployment Rates *

Area	Unemployment Rate (percent)
Anglesey	8.6
Conwy	5.9
Gwynedd	6.6
Denbighshire	7.6
Wrexham	***6.5***
Flintshire	***6.3***
Cheshire West and Chester	6.0
Wirral	7.8
Wales	*7.9*

Source: ONS Annual Population Survey Jan 2013-Dec 2013

**As a percentage of the geographic area's economically active population.*

3.11 Unemployment in Wrexham and Flintshire has increased over the recessionary periods of 2008 to 2013. In mid-2007 (pre-recession), the areas had an unemployment rate of 4.5 percent. As Table 9 shows, by mid-2010 (the approximate mid-point of the recession) unemployment had increased to 7.2 percent with a slight reduction over the following three years, to 6.5 percent in mid-2013 (the beginning of the economic recovery).

Table 9 – Unemployment Change 2007-2013, Percent*

Area	Mid 2007 Unemployment Rate	Mid 2010 Unemployment Rate	Mid 2013 Unemployment Rate	Percentage change 2008-2013
Anglesey	5.9	7.3	7.5	+1.6
Conwy	4.7	6.9	6.6	+1.9
Gwynedd	4.9	6.2	6.5	+1.6
Denbighshire	4.8	7.5	7.4	+2.6
Wrexham	***4.6***	***7.2***	***6.8***	***+2.2***
Flintshire	***4.3***	***7.1***	***6.2***	***+1.9***
Cheshire West and Chester	4.2	6.8	6.2	+2.0
Wirral	7.2	8.7	7.2	0.0
Wales	*5.4*	*8.1*	*8.2*	*+2.8*

Source: ONS Annual Population Survey, 2007, 2010 and 2013

**Percentage of economically active population.*

3.12 Wales saw comparable increases in unemployment over 2007-2010. However, since 2010 the study area has only experienced a modest drop in unemployment. In that same period, Wales has had a slight increase in unemployment.

3.13 According to the 2011 Wales Index of Multiple Deprivation, Queensway 1 Lower Super Output Area (the Caia Park and Hightown Cluster) is ranked as the ninth most deprived area in Wales, moving down the list from second place in 2008. Overall, nine of the 177 LSOAs in Wrexham and Flintshire are ranked within the top ten percent most deprived LSOAs in Wales. In addition to the neighbourhood already mentioned, this includes parts of Acrefair in Wrexham, and parts of Shotton, Connah's Quay, Holywell and Mold in Flintshire.

3.14 However, it is important to note that Wrexham also includes nine LSOAs that are amongst the top ten percent *least* deprived LSOAs in Wales, whilst Flintshire contains 14. These include areas along the A483 in Wrexham such as Rossett, Marford and Gresford. Some of Flintshire's neighbourhood contain both extremes of deprivation - the most and least deprived LSOAs - such as Connah's Quay and Mold. This illustrates how diverse socio-economic conditions are across the two areas.

3.15 Table 10 shows that the National Vocational Qualification (NVQ) level attained by the working age population of Wrexham and Flintshire. The combined area has the lowest proportion of working age residents qualified to NVQ Level 4 and above (equivalent to degree level), in the region, at 28.5 percent. This level is also below the Welsh national average. The two areas also have the highest proportion of residents with no qualifications (10 percent), although this is lower than the Welsh national average (11.4 percent).

Table 10 – Qualifications (2012), Percent

Level	NVQ4 and above	NVQ3 and above	NVQ2 and above	NVQ1 and above	Other qualifications	No qualifications
Anglesey	31.6	53.9	69.8	80.6	7.8	11.6
Conwy	32.3	52.5	71.3	82.2	8.0	9.8
Gwynedd	31.7	52.0	75.0	85.4	5.2	9.4
Denbighshire	28.8	48.2	69.8	82.9	7.8	9.3
Wrexham	27.1	50.6	68.9	81.0	8.6	10.5

Level	NVQ4 and above	NVQ3 and above	NVQ2 and above	NVQ1 and above	Other qualifications	No qualifications
Flintshire	29.9	53.4	72.7	85.1	5.4	9.5
Cheshire West and Chester	31.8	55.9	76.2	89.7	3.0	7.3
Wirral	29.7	51.3	73.2	87.6	3.1	9.3
Wales	30.3	51.7	69.7	82.0	6.6	11.4

Source: ONS Annual Population Survey 2012

Employment by Occupation

3.16 Table 11 illustrates the breakdown of employment by main occupation group. Wrexham has the highest proportion of process plant and machine operatives than is the case elsewhere in the study area. Apart from this particular occupation group, neither Wrexham nor Flintshire contain the highest, or conversely the lowest, percentage of any of the occupation groups.

Table 11 – Employment by Main Occupation Group

Socio-Economic Class	Wrexham, percent	Flintshire, percent	Wales, percent
Managers and senior officials	8.3	10.1	9.2
Professional occupations	17.8	17.3	18.1
Associate professional and technical occupations	11.7	10.9	12.4
Administrative and secretarial occupations	11.5	10.8	11.1
Skilled trades occupations	12.7	13.0	12.1
Personal service occupations	8.6	7.9	10.1
Sales and customer service occupations	7.8	8.8	7.9
Process plant and machine operatives	9.7	8.8	7.2
Elementary occupations	11.4	12.2	10.9

Source: Annual Population Survey October 2012 to September 2013

3.17 Both Wrexham and Flintshire have a higher proportion of people employed in high level occupations such as managers and senior officials than its mid-level and low level counterparts. This proportion employed in the high level occupation group is lower than national averages.

3.18 Table 12 measures local economic activity using Business Register and Employment Survey (BRES) data. BRES provides details of the number of jobs within differing industry sectors within a local authority area.

Table 12 – Economic Activity

	Employment Structure, proportion of jobs, percent		
	Flintshire	**Wrexham**	**Wales**
Agriculture and Fishing*	0.1	0.1	1.3
Mining, Quarrying and Utilities	1.9	1.9	1.8
Manufacturing	29.4	19.6	11.2
Construction	3.7	2.7	4.4
Motor Trade, Wholesale and Retail	14.9	15.7	16.3
Transport and Storage	3.9	3.5	3.2
Information and Communication	3.1	1.2	1.9
Finance and Insurance, Property, Professional and Business Administration	14.1	10.0	13.4
Public Administration, Education and Health	20.7	35.0	34.8
Other Services	8.3	10.3	12.0

Source: Business Register and Employment Survey 2012

**Excludes farm based agriculture.*

3.19 Table 12 illustrates the strength of the manufacturing sector employment in Wrexham and Flintshire. The manufacturing sector employs a high proportion of local jobs in both Counties. It accounts for 24.5 percent of jobs, more than double the Welsh national average. This is attributed to the strength of key sectors and the headquarters and base for a number of major international manufacturing companies.

3.20 Other strong local sectors include public administration, education and health, which employed 27.9 percent of the working population in Wrexham and Flintshire, and somewhat aligns to the regional and national figures. The Council and local primary and secondary schools are the largest individual employers. However, when the Counties are assessed individually, Flintshire only employs 20.7 percent of the workforce, compared to Wrexham's 35.0 percent.

3.21 The motor trade, wholesale and retail, as well as the finance and insurance industry are considered strong, employing 15.3 percent and 12.05 percent respectively. These figures are broadly in line with sub-regional and national figures.

3.22 Other services include accommodation and food, along with arts and entertainment, suggesting that Wrexham and Flintshire has a successful visitor economy, though the figure is not as high as the sub regional and national figures for Wales.

3.23 Weaker sectors within the two Counties are mining quarrying and utilities; construction; and, transport and storage. The proportion of population employed in these sectors also aligns with the national figure.

3.24 Agriculture, forestry and fishing employ only 0.1 percent of the County's population. However, BRES data excludes farm based agricultural employment.

Numbers and Sizes of Businesses

3.25 ONS data identifies that there were 9,865 VAT registered businesses operating in both Counties (see Table 13) in 2013. This is more than a third of the total stock of businesses in North Wales (35.5) and 8.9 percent of the Welsh national stock. This is a vast contribution compared to other Welsh Counties; however, is modest compared to its English neighbouring authorities.

Table 13 – Total Number of VAT Registered Businesses

Area	VAT Registered Businesses, 2013
Anglesey	2,825
Conwy	4,825
Gwynedd	6,225
Denbighshire	4,015
Wrexham	***4,505***
Flintshire	***5,360***
Cheshire West and Chester	14,285
Wirral	8,755
Mersey Dee Area	*36,920*
North Wales	*27,755*
Wales	*110,515*

Source: ONS Vat Registrations/Deregistration, 2013

3.26 The average number of businesses in Wrexham and Flintshire compares well to that in surrounding local authority areas. Unsurprisingly, there are many more businesses in Wrexham and Flintshire than in the neighbours, such as Anglesey, Conwy and Denbighshire. Only Gwynedd is home to a significantly greater number of firms than the two County's average.

3.27 As an alternate measure, Welsh Government figures suggested that in 2013 there were 9,795 businesses in Wrexham and 9,550 in Flintshire. This gives a combined total of 19,345.

3.28 82.1 percent of businesses in Wales employ less than ten people (micro businesses), and overall 96.7 percent of all businesses are classified as small (up to 49 employees). Business sizes in Wrexham and Flintshire generally follow national averages. Wrexham and Flintshire have slightly less micro businesses with 1-9 employees (80.4 percent and 80.6 percent, respectively) and slightly more small businesses of 10-49 staff (15.9 percent and 15.1 percent, respectively). As Table 14 shows, 95.9 percent of businesses in Wrexham and 95.7 percent in Flintshire employ less than 50 employees.

Table 14 – Business Sizes, percent

Area	Number of Employees						
	1-4	5-9	10-19	20-49	50-99	100-249	250+
Wrexham	64.2	16.2	9.5	6.4	1.9	1.0	0.7
Flintshire	65.4	15.2	9.0	6.1	2.5	1.3	0.6
Wales	65.9	16.2	8.9	5.7	1.9	1.0	0.4

Source: ONS 2013

3.29 The total number of VAT registered businesses can be broken down further by industry sector. Table 15 shows that the highest proportion of businesses in Wrexham is in the retail sector at 11.0 percent, comparable to national and regional averages (12.1 percent and 11.4 percent, respectively). The professional, scientific and technical sector has the second highest number of VAT registered businesses (10.3 percent), followed closely by the construction sector (10.2 percent).

3.30 The professional, scientific and technical sector accounts for the highest proportion of businesses in Flintshire. This sector accounts for 12.9 percent of active businesses,

higher than the national average (8.5 percent). The second and third largest business sector in Flintshire respectively is construction (10.6 percent) and retail (10.5 percent).

3.31 The second largest business sector is retail, which accounts for 10.8 percent of VAT registered businesses. This is below the national average (12.1 percent). The local construction sector is also very strong, accounting for 10.4 percent of businesses, equivalent to the national average.

3.32 At 7.9 percent (Wrexham) and 8.7 percent (Flintshire), the proportion of production related businesses is noticeably above both the Welsh (5.9 percent) average. In terms of other sectors, the agriculture, forestry and fishing industry has a lower proportion of business operations, compared to the Welsh average of 12.6 percent. All other sector percentages broadly follow national trends.

Table 15 – VAT Registered Businesses by Sector, percent

Sector	Wrexham	Flintshire	Wales
Agriculture, Forestry and Fishing	8.1	6.7	12.6
Production	7.9	8.7	5.9
Construction	10.2	10.6	10.2
Motor Trades	3.6	4.5	3.4
Wholesale	5.4	5.0	3.9
Retail	11.0	10.5	12.1
Transport and Storage	4.0	5.2	3.4
Accommodation and Food Services	6.2	6.6	7.9
Information and Communication	3.1	3.7	3.4
Finance and Insurance	1.7	1.9	2.1
Property	2.7	2.3	2.5
Professional, Scientific and Technical	10.3	12.9	8.5
Business Administration and Support Services	6.1	6.5	6.4
Public Administration and Defence,	1.3	1.0	1.4
Education	2.8	2.7	2.9
Health	8.1	5.6	6.7
Arts, Entertainment, Recreation and Other Services	7.4	5.4	6.5

Source: ONS 2013

Geographic Location

3.33 Table 16 shows the distribution of office and industrial premises (hereditaments identified by the Valuation Office for the purposes of business rates collection). The spatial distribution can be analysed by Middle Super Output Areas (MSOAs). Flintshire comprises 20 such MSOAs, Wrexham 18, and these have been separated into the main settlements and their surrounding hinterlands. The most recent Valuation Office data available at the MSOA level is only for 2008, which pre-dates the recession and will not account for recent development (notably at Deeside).

Table 16 – Distribution of Premises and Homeworking

Area	Middle SOAs	Number of Units		Number of People Homeworking
		Factories/ Warehouses	Offices	
Flintshire				
Deeside Includes Connah's Quay, Northon Hall	007-008, 010	75	17	286
Sealand and Saltney Includes Shotton	009	380	105	122
Queensferry	011	199	23	77
Buckley Includes land west of the A55, extending north to Northop, Ewloe, Mynydd Isa	012-014, 017	186	82	693
Broughton Includes Bretton, Penyfford, Higher Kinnerton	015, 018	347	75	333
Mold	016	112	177	187
Flintshire Coast Includes Flint, Mostyn, Greenfield, Holywell, Bagillt	002-005	315	191	469
Rural North and West	001, 006, 019-020	201	42	1,067
Total		**1,815**	**712**	**3,234**
Wrexham				
Wrexham Town	007-012	191	235	509
Eastern Settlements Includes Wrexham Industrial Estate and extends north to Gresford, Burton, Burton Green and Llay Industrial Estate	020	580	134	482

Area	Middle SOAs	Number of Units		Number of People Homeworking
		Factories/ Warehouses	Offices	
Llay and Gwersyllt	003	78	11	90
North West Settlements Includes Summerhill, Moss Brynteg, Pentre Broughton, New Broughton, Coedpoeth	004-006	88	43	272
Western and South Western Settlements Includes Rhostyllen, Rhosllanerchurgog, Johnstown,	013-015	191	23	292
Southern Settlements Includes Marchwiel, Ruabon, Cefn Mawr, Acrefair, Froncysyllte, Chirk	016-017, 019	195	46	552
South Eastern Settlements Includes Horseman's Green and some southern parts of Wrexham Industrial Estate	018	106	19	427
Total		**1,429**	**511**	**2,624**

Source: ONS Commercial and Industrial Floorspace 2008/ Census 2011

3.34 In Flintshire, as Table 16 shows, overall the number of industrial units was more than double the number of offices. In 2008, the greatest concentration of industrial premises was in MSOA 009 (Sealand and Saltney, which includes the industrial estates bounding Chester), with 380 units. MSOA 015 (Broughton and Bretton) and MSOA 011 (Queensferry including all adjoining industrial estates) were also a focus for industrial premises, with 336 and 199 units respectively. Offices were focused in MSOAs 016 (Mold) and 003 (Greenfield, Holywell and Bagillt), with 177 and 140 premises respectively.

3.35 There were comparatively few premises in Deeside, reflecting the fact that this is a focus for larger occupiers (who require smaller numbers of large buildings) in the County Borough. In 2008, there were only 75 industrial premises and 17 offices here. Again these figures will not account for development since 2008. There were also no office or industrial units recorded in MSOA 010 which comprises residential areas of Connah's Quay and Northon Hall. Also in MSOA 014 which comprises the settlement of Mynydd Isa, west of Buckley.

3.36 In Wrexham, as Table 16 shows, overall the number of industrial units were almost triple the number of offices. In 2008, the greatest concentration of industrial premises was, unsurprisingly in MSOA 020 (which includes Wrexham and Llay Industrial Estates), with 580 units. Elements of Wrexham Industrial Estate also extend into MSOA 018, which accounts for at least some of the 106 units found in this otherwise rural area. Wrexham's office supply is also focused at MSOA 020 and comprised 134 premises in 2008.

3.37 Within Wrexham Town, offices are focused in the north west (MSOA 008 – from the town centre up to the Garden Village neighbourhood and including most of Glyndŵr University and Coleg Cambria) and the south west (MSOA 011 – including the Hospital, Wrexham Technology Park/Western Gateway and the south of the town centre), with 114 and 96 premises respectively.

Homeworking

3.38 Homeworking plays a modest role in the economy of both Flintshire and Wrexham. The 2011 Census records that 2.9 percent of the economically active population of Flintshire worked from home that year, while 2.7 percent of Wrexham's economically active population were homeworkers. This compared to an average of 3.3 percent across Wales.

3.39 Across North Wales proportions ranged from 2.7 percent in Wrexham to 5.1 percent in rural Gwynedd. Comparatively urban Wirral had the lowest proportion of homeworkers (2.4 percent), while Cheshire West and Chester and Denbighshire had the joint highest at 3.9 percent.

3.40 Unsurprisingly, higher proportions of people worked from home in the more peripheral parts of both County Boroughs. In Flintshire, the highest proportion of homeworkers (6.6 percent) was in MSOA 006 which comprises a large rural area in the west of the County, bounded by Mold in the south, the A55 in the north and east and the boundary with Denbighshire in the west. In Wrexham, the highest proportion of homeworkers (9.0 percent) is in MSOA 019 which comprises the rural south west of the County Borough, extending west from Chirk and the A5 into the rural area south of Llangollen.

Commuting Patterns

3.41 Annual statistics on commuting in Wales are available from Welsh Government, the latest available being for 2012 (see Table 17) These figures show that, in that year, Flintshire had the highest rate of out-commuting of 41 percent; with Wrexham showing a lower out-commuting in comparison. 29 percent of working residents commuted out of Wrexham, comparable to the North Wales average.

Table 17 – North Wales Commuting Flows, 2012

Area	Out-Commuters (No.)	In-Commuters (No.)	Live and Work in Area (No.)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Isle of Anglesey	9,100	3,700	21,100	70
Gwynedd	6,900	13,100	46,200	87
Conwy	12,100	8,100	35,100	74
Denbighshire	13,000	12,400	28,700	69
Flintshire	29,300	13,100	41,500	59
Wrexham	18,000	14,900	45,000	71
North Wales	*88,400*	*65,300*	*217,600*	*71*

Source: Welsh Government, 2012

3.42 The County's neighbours also recorded much lower rates of commuting in 2011, in comparison to Flintshire. Levels were more in line with Wrexham, with the Isle of Anglesey, Conwy and Denbighshire showing 30 percent, 26 percent and 31 percent respectively of residents out-commuting.

3.43 Tables 18 and 19 record the levels of in and out-commuters and their source and destination. The level of internal commuter flow is also recorded within the Tables. These show a high levels of self containment in Wrexham, with a lower relationship with Cheshire West and Chester (9.8 percent) in terms of out-commuting, compared to Flintshire (19.8 percent).

3.44 A high proportion of Flintshire's residents commuted into Cheshire West and Chester (19.8 percent). Modest percentages of Flintshire residents also commute to Wrexham, Denbighshire or Liverpool (5.9 percent, 5.1 percent and 2.1 percent, respectively).

Table 18 – Out-Commuter Flows

Wrexham			Flintshire		
Workplace	**Number**	**Percentage**	**Workplace**	**Number**	**Percentage**
Internal Commuting - Wrexham	45,000	71.4	Internal Commuting - Flintshire	41,500	58.6
Cheshire West and Chester	6,200	9.8	Cheshire West and Chester	14,000	19.8
Shropshire	3,900	6.2	Wrexham	4,200	5.9
Flintshire	2,200	3.5	Denbighshire	3,600	5.1
Denbighshire	1,100	1.7	Liverpool	1,500	2.1
Other UAs / LADs	4,600	7.3	Other UAs / LADs	6,000	8.5
Total	**63,000**	**100**	**Total**	**70,800**	**100**

Source: Welsh Government, 2012

Table 19 – In-Commuter Flows

Wrexham			Flintshire		
Workplace Area	**Number**	**Percentage**	**Workplace Area**	**Number**	**Percentage**
Internal Commuting - Wrexham	45,000	75.1	Internal Commuting - Flintshire	41,500	76
Cheshire West and Cheshire	4,200	7.0	Wrexham	2,300	4.2
Flintshire	3,900	6.5	Denbighshire	2,600	4.8
Shropshire	3,500	5.8	Cheshire West and Cheshire	2,100	3.8
Denbighshire	1,800	3.0	Conwy	1,000	1.8
Other UAs / LADs	1,500	2.5	Other UAs / LADs	5,100	9.3
Total	**59,900**	**100**	**Total**	**54,600**	**100**

Source: Welsh Government, 2012

3.45 In comparison, Wrexham saw similar levels of out-commuting across most destinations – Cheshire West and Chester (9.8 percent), Shropshire (6.2 percent) and Flintshire (3.5 percent).

3.46 Respectively, 14,900 and 13,100 people commuted into Wrexham and Flintshire, to work. In-commuters to Wrexham came from Cheshire West and Cheshire (7.0 percent), Flintshire (6.5 percent), Shropshire (5.8 percent) and Denbighshire (3.0 percent). 17.6 percent of the in-commuters to Flintshire came from Wrexham, whilst

16.0 percent of the in-commuters into Flintshire came from Cheshire West and Chester.

3.47 The data shows that Wrexham and Flintshire have good economic links with each other. Across the border the strongest links are with Cheshire West and Chester and, for Wrexham, Shropshire. Flintshire has strong linkages with neighbouring Denbighshire, but elsewhere, links with other areas of North Wales were modest for both Flintshire and Wrexham.

Earnings

3.48 Table 20 shows that the earnings of people living and working in Wrexham and Flintshire are higher than the national average when measured by place of residence and by place of work.

Table 20 – Average Weekly Earnings

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Isle of Anglesey	384.8	401.1
Gwynedd	303.5	318.2
Conwy	322.9	329.3
Denbighshire	364.6	334.7
Flintshire	***384.1***	***372.2***
Wrexham	***365.5***	***384.9***
Wales	361.3	366.5

Source: Annual Survey of Hours and Earnings 2012

3.49 When measured by place of work, average weekly pay is higher in Flintshire than in all other local authority areas in North Wales, and is followed by Wrexham. When measured by place of residence, Wrexham's performance is better than Flintshire's, with both performing better than the remaining authorities in North Wales.

Summary

3.50 Wrexham and Flintshire have a combined population of 287,350 people and are the most populous local authority areas in North Wales. Their respective populations are larger than their Welsh neighbours, but significantly lower than Cheshire West and Chester and Wirral.

3.51 The local workforce is active. At 6.5 percent for Wrexham and 6.3 percent for Flintshire unemployment rates are low in the context of the Welsh rate (7.9 percent), and employment in the Counties appears to be increasing as the national economy recovers from recession.

3.52 However, this review of socio-economic data has raised some areas of concern. Specifically that Wrexham and Flintshire has:

- Several areas of intense local deprivation, notably Caia Park and Hightown, and Acrefair in Wrexham. Also Shotton, Connah's Quay, Holywell and Mold in Flintshire
- A low proportion of local residents qualified to degree level and a comparatively high proportion of people with no qualifications
- A strong dependence on the manufacturing sector employment, although the number employed in state sectors is actually below wider Welsh averages.

3.53 There were some 9,865 VAT Registered businesses operating in the two Counties in 2013 (4,505 in Wrexham and 5,360 in Flintshire). As an alternate measure, Welsh Government figures suggested that in 2013 there were 9,795 businesses in Wrexham and 9,550 in Flintshire. This gives a combined total of 19,345.

3.54 Most of those businesses employ less than ten employees (80.4 percent in Wrexham and 80.6 percent in Flintshire). A large proportion of local businesses in Wrexham and Flintshire are in the following sectors: professional, scientific and technical (10.3 percent and 12.9 percent, respectively); retail (11.0 percent and 10.5 percent, respectively); and, construction (10.2 percent and 10.6 percent, respectively). The local production sector is also strong, whilst the agriculture, forestry and fishing sector is weaker in comparison to the regional and national averages.

3.55 In 2008, the greatest concentration of industrial premises in Flintshire was focused in Sealand and Saltney, which includes the industrial estates bounding Chester. Offices were focused in Mold, Greenfield, Holywell and Bagillt. In Wrexham the industrial units, in 2008, were concentrated in Wrexham and Llay Industrial Estates. Office units were concentrated in Wrexham town, specifically in the town centre (extending

to include the main Glyndwr University and Coleg Cambria campuses) and at Wrexham Technology Park.

3.56 Homeworking plays a modest role in the economies of both Wrexham and Flintshire. The 2011 Census records that 2.9 percent of the economically active population of Flintshire worked from home that year, while 2.7 percent of Wrexham's economically active population were homeworkers. This compared to an average of 3.3 percent across Wales.

3.57 In 2012, Flintshire had the highest rate of out-commuting in North Wales, with Wrexham showing a more modest rate. 41 percent of working residents commuted out of Flintshire to work, whilst the figure for Wrexham was only 29 percent. When comparing all recorded commuter flows (i.e. internal commuting also), Cheshire West and Chester represented a much stronger pull for Flintshire's working population, at 19.8 percent compared to Wrexham's 9.8 percent.

3.58 At £365.5-£384.9 per week in Wrexham and £372.2-£384.1 per week in Flintshire, the average earnings of people living and working in Wrexham and Flintshire are higher than average earnings in all neighbouring local authority areas in North Wales. Earnings are also above the Welsh averages which do not exceed £366.5 per week.

4.0 PROPERTY MARKET – GENERAL

Introduction

4.1 Prior to analysing the study area's property market by the individual components of sites, industrial and offices – commentary is provided about the study area as a whole. This comprises a review of the supply of premises along with commentary on general national property and business trends. It is important to understand the supply and demand for property, as ultimately this is the key driver affecting the market for employment land.

Welsh Government

4.2 Table 21 shows enquiries received by the Welsh Government for land and premises in Wrexham and Flintshire over the 2006/07 to 2012/13 period (figures for 2013/14 are not yet available). However, there are caveats to this analysis. Firstly, the year 2009/10 saw a significant decrease in enquiry numbers, which is not simply a reflection of the impact of the UK recession. Rather, it is understood to be the consequence of internal restructuring within the relevant Welsh Government (then Welsh Assembly Government) departments, which took place over that year and meant that not all of the enquiries received in 2009/10 were recorded.

4.3 Secondly the enquiries are derived from a mix of sources including the Welsh Government website and may involve multiple searches by the same organisation; telephone enquiries to Welsh Government and overseas inward investment interest via UK consulates – so data may not be uniformly recorded.

4.4 Finally, the data does not tell us if the organisations enquiring about land and property in the Counties also enquired about sites and premises in some, or indeed all, of the other local authority areas of Wales. Thus some of the organisations, shown as having a specific interest in the areas, may in fact have a much wider area of search for their land/property requirements.

4.5 Tables 21 and 22 set out year by year analysis of the sector type of property enquiries for Wrexham and Flintshire over 2006/07-2012/13. In this period 2,904 enquiries were received for the two Counties, with industrial premises accounting for 51.5 percent. The remainder were split fairly evenly between offices and land. The figures reveal that from a peak of 760 enquiries in 2007/2008 the recession impacted

over 2008/09 to 2010/11, and by 2010/11 the level of enquiries was less than a fifth of what it had been three years earlier. Demand is gradually recovering, and though receiving double the enquiries since the recession, enquiry levels are still half of pre-recession rates. This generic picture also applies to the analysis of differing property sectors. The level of enquiries for office, industrial and land are generally at similar levels when both Counties are assessed individually. Enquiry levels differed in 2008/2009, when Flintshire received nearly three times as many office enquiries as Wrexham, but almost half the industrial enquiries. Flintshire also received nearly four times as many industrial enquiries in 2009/2010 and 50 more enquiries in 2012/2013.

Table 21 – Welsh Government Enquiries by Type for Wrexham

Type	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	Total
Office	77	87	46	30	8	33	20	301
Industrial / Warehouse	181	183	108	16	42	111	83	724
Land	98	108	49	8	15	20	54	352
Total	**356**	**378**	**203**	**54**	**65**	**164**	**157**	**1,377**

Table 22 – Welsh Government Enquiries by Type for Flintshire

Type	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	Total
Office	88	94	116	24	7	28	24	381
Industrial / Warehouse	198	196	58	62	52	122	113	801
Land	103	92	39	10	16	23	62	345
Total	**389**	**382**	**213**	**96**	**75**	**173**	**199**	**1,527**

4.6 Tables 23 – 24 provide a breakdown of the 1,698 industrial/warehouse and office enquiries where a size preference was recorded for both Counties. Generally, Wrexham received more than twice as many enquiries than Flintshire, with a larger number of enquiries across all size bands.

4.7 Whilst half of the enquiries for both Counties were for properties of less than 929 sqm. However, around a third of all enquiries in the study area were for units in excess of 2,324 sqm, representing 38.7 percent of Wrexham's enquiries and 27.7 percent of the total enquiries. This reflects the fact that the Welsh Government is likely to be the first port of call for larger established businesses (including national

and international firms) that are looking to invest into the County Borough, and elsewhere in Wales. Such organisations may have substantial property requirements. Small and micro businesses (with correspondingly smaller property needs) are more likely to make enquiries with agents and local organisations, including WCBC and FCC, than with the Welsh Government.

Table 23 – Welsh Government Enquiries by Size for Wrexham 2006-2013

Type	Size Band, sqm								
	0-464	465-929	930-1,394	1,395-1,858	1,859-2,323	2,324-4,645	4,646-9,290	9,291+	Total
Industrial / Warehouse	155	77	42	44	29	74	64	83	**568**
Offices	150	19	10	8	8	17	12	4	**228**
Total	**305**	**96**	**52**	**52**	**37**	**91**	**76**	**87**	**796**

Source: Welsh Government, 2014

Table 24 – Welsh Government Enquiries by Size for Flintshire 2006-2013

Type	Size Band, sqm								
	0-464	465-929	930-1,394	1,395-1,858	1,859-2,323	2,324-4,645	4,646-9,290	9,291+	Total
Industrial / Warehouse	169	87	49	56	35	82	73	94	**645**
Offices	165	28	12	7	9	19	12	5	**257**
Total	**334**	**115**	**61**	**63**	**44**	**101**	**85**	**99**	**902**

Source: Welsh Government, 2014

4.8 A similar number of land enquiries were received in Wrexham and Flintshire across all size bands. As Table 25 shows, nearly half (48.5 percent) of all the land enquiries (where a preferred size was stated) were for plots of up to 2.02 ha.

Table 25 – Welsh Government Land Enquiries by Size 2006-2013

Land Area	Size Band, ha								
	0-2.02	2.03-4.05	4.06-6.07	6.08-8.09	8.10-10.12	10.13-20.23	20.24-40.47	40.47 +	Total
Wrexham	142	40	15	22	6	27	11	19	**282**
Flintshire	128	41	16	22	7	29	12	20	**275**
Total	**270**	**81**	**31**	**44**	**13**	**56**	**23**	**39**	**557**

Source: Welsh Government, 2014

Public Sector Enquiries – Wrexham

4.9 BE Group has reviewed land and property enquiries recorded by WCBC for the period January 2009 to April 2014. Comparable information has not been received from FCC. All property enquiries received by WCBC's Assets and Economic Development Department are added to a Client Management system. It should be noted that prior to 2011 two property enquiry systems operated independently in Wrexham County Borough. One was maintained by the Commercial Estates team in the former Transportation and Asset Management Department. This only matched enquires to Council owned property. The other, in the former Economic Development Department, tried to match all enquires to any property, either public or private that was available for occupation in the County Borough.

4.10 These two databases have now been consolidated into one and all enquires are initially handled by the Business Support team, based in Redwither Tower. A new Client Management System (Evolutive) has been introduced that will improve and speed up enquiry handling.

4.11 Table 26 sets out year by year analysis of the sector type of property enquiries for Wrexham between January 2009 and April 2014. A total of 713 enquiries were received over this period, with office units accounting for 39.0 percent and industrial premises accounting for 55.1 percent. 5.9 percent of total enquiries were for land. Of the 42 land enquiries, over a third was recorded in the first four months of 2014 (35.7 percent). The figures show improving demand, apart from the 2013 period, where enquiries remained at a stable level. Figures for 2014 represent the January to April period, Based on the enquiries already received for the 2014 period, it is estimated that total enquiries received for the whole year will amount to circa 280 enquiries, representing an increase from the previous year.

Table 26 – Council Enquiries by Type

Use	2009	2010	2011	2012	2013	2014*	Total	Percent
Office	10	39	41	71	73	44	**278**	**39.0**
Industrial	18	41	53	143	128	11	**393**	**55.1**
Land	4	5	7	7	3	15	**42**	**5.9**
Total	**32**	**85**	**101**	**221**	**204**	**70**	**713**	**100.0**

Source: Wrexham County Borough Council, 2014
**January-March 2014*

4.12 81.6 percent of enquiries about property stated a preferred size band. As Table 26

shows, over half of those enquiries (54.0 percent) were for properties at the smaller end of the size spectrum, i.e. below 93 sqm. 83.7 percent were looking for properties of less than 464 sqm.

Table 27 – Council Enquiries by Size and Year

Year	Size Band, sqm							Total
	0-46	47-93	94-232	233-464	465-929	930-4644	4645+	
2009	3	5	1	5	2	4	2	**22**
2010	22	12	14	9	5	5	3	**70**
2011	25	18	17	13	7	11	1	**92**
2012	69	46	22	32	8	14	5	**193**
2013	64	27	26	13	14	6	0	**159**
2014	8	15	10	11	3	6	2	**55**
Total	**191**	**123**	**90**	**83**	**39**	**46**	**10**	**582**

Source: Wrexham County Borough Council, 2014

4.13 As Table 28 shows, most enquiries are for properties at the smaller end of the size spectrum, i.e. below 464 sqm. However, the industrial/warehousing sector, not unsurprisingly, exhibits a greater percentage of enquiries for larger floorplates – particular in the 465-929 sqm and 930-4,644 sqm size bands. The lack of enquiries for industrial/warehouse properties of 4,645 sqm or larger will also reflect the fact that there are few such large properties available in either local authority area. Half of the enquiries for land relates to sites of less than 0.5 ha.

Table 28 – Council Enquiries by Size and Type

Type	Size Band, sqm						Total
	0-93	94-232	233-464	465-929	930-4,644	4,645+	
Office	155	29	14	8	3	0	**209**
Industrial/ Warehouse	159	61	69	31	43	10	**373**
Land Size Band, ha	**0-0.5**	**0.6-1.0**	**1.1-2.0**	**2.0+**			**Total**
Number	12	5	2	5			**24**

Source: Wrexham County Borough Council, 2014

Property Supply

4.14 A schedule of the vacant floorspace being marketed in the study area (as at March 2014) has been included in Appendices 2 and 3. Data was initially taken from a

mixture of property agents' websites and the local authority commercial property registers of the two Counties. This was subsequently augmented with site visits and telephone discussions to determine that the identified vacant properties remain available.

4.15 The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed. There may also be a delay between deals being reached for properties and the details of those properties being removed from websites. It should also be noted that the below figures exclude any occupied properties being sold as investment opportunities to potential new freehold owners.

4.16 The schedules for industrial (including warehouses and workshops) and offices have been included in Appendix 2 (for Wrexham) and Appendix 3 (for Flintshire).

Wrexham Property Supply

Industrial

4.17 Table 30 shows that there is 62,876 sqm of marketed industrial floorspace, made up of 53 properties, in the study area. This is a 3.3 percent decrease from the 65,032 sqm recorded in the Wrexham Employment Sites Study (2007).

4.18 There is a reasonable range through the 0-500 sqm bands, but property sizes above 500 sqm are limited. By far the greatest availability is in the 101-200 sqm and 201-500 sqm category, accounting for 62.3 percent of the available units.

4.19 Unsurprisingly Wrexham Industrial Estate has the largest amount of vacant floorspace (45.9 percent), closely followed by Llay Industrial Estate (40.6 percent). Though these two Estates dominate the industrial property market, in terms of property numbers, Wrexham Industrial Estate outnumbers the latter by 2:1. Wrexham Industrial Estate also has at least one property across the size ranges apart from units of less than 100 sqm, and provides the only unit in the 1,001-2,000 sqm size band. Llay Industrial Estate, on the other hand, has no mid-sized properties available.

4.20 As expected of a town centre location, Wrexham town has no units of larger than

1,000 sqm, providing 3.2 percent of the floorspace and 11.3 percent of the units.

4.21 The industrial supply by location lie within an approximate 5 mile radius from Wrexham town. Venture further out than this and the available industrial units are non-existent. There are no units in the Ceiriog Valley, and none in the settlements of Chirk, Cefn Mawr, Acrefair, Ruabon or Johnstown. The western area of Wrexham therefore, provides only 3.8 percent of the total units amounting to 3,167 sqm or 5.0 percent of the floorspace.

4.22 Wrexham Industrial Estate, in March 2014 at least, had only 22 marketed industrial premises out of an overall stock of 450 units. By properties, this represents a comparatively modest vacancy rate of 5 percent. It should be noted that a rate of around 7-10 percent is considered healthier in terms of giving occupiers a full choice of premises types, locations, sizes and tenures.

4.23 With less than one percent of the total floorspace, Homes Farm in Overton-on-Dee presents the only available units to the south of Wrexham. All of these are for small workshops of less than 200 sqm.

Table 30 – Amount of Marketed Industrial Property

Area		Size Band, sqm							Total
		0-100	101-200	201-500	501-1,000	1001-2,000	2,001-5,000	5,001+	
Wrexham Town (includes Rhosddu Industrial Estate; Pandy Business Park)	Number of Properties	1	2	1	2	-	-	-	6
	Floorspace, sqm	83	286	204	1446	-	-	-	2019
Wrexham Industrial Estate	Number of Properties	-	4	12	2	2	1	1	22
	Floorspace, sqm	-	636	3457	1487	2827	2654	17781	28842
Llay Industrial Estate	Number of Properties	2	4	3	-	-	-	2	11
	Floorspace, sqm	116	436	825	-	-	-	24155	25532
Cefn-y-Bedd and Llay (Riverside Business Park; Alyn Industrial Estate)	Number of Properties	4	2	1	-	-	1	-	8
	Floorspace, sqm	305	298	241	-	-	2023	-	2867

Area		Size Band, sqm							Total
		0-100	101-200	201-500	501-1,000	1001-2,000	2,001-5,000	5,001+	
Overton-on-Dee	Number of Properties	1	3	-	-	-		-	4
	Floorspace, sqm	56	393	-	-	-		-	449
Rhostyllen and Rhos (Coppi Industrial Estate; Bersham Enterprise Centre)	Number of Properties	-	1	-	-	-	1	-	2
	Floorspace, sqm	-	186	-	-	-	2981	-	3167
Total	**Floorspace, sqm**	**560**	**2235**	**4727**	**2933**	**2827**	**7658**	**41936**	**62876**
	Number of Properties	**8**	**16**	**17**	**4**	**2**	**3**	**3**	**53**

Source: BE Group 2014

4.24 Building quality is broken down into three category assessments as shown in Table 31, based on the headline rents of the available units. Rental levels provide a good indication of the general quality of a property without a detailed physical inspection. Table 32 shows the majority of marketed space in Wrexham is of moderate quality, with half of these at Wrexham Industrial Estate. Good quality premises are only available in four areas, with half of the property availability at Llay Industrial Estate. There are no 'good quality' industrial units on the market within Wrexham Industrial Estate. Budget options are provided within each of the areas, with Wrexham Industrial Estate providing nearly half of the available stock.

Table 31 – Building Quality Assessment

Type	Quality Assessment – Rental Levels		
	Good	Average	Budget
Industrial	>£5.00/sqft	£2.50-5.00/sqft	<£2.50/sqft
Office	>£15.00/sqft	£5.00-15.00/sqft	<£5.00/sqft

Source: BE Group 2014

Table 32 – Quality of Marketed Industrial Property

Area	Quality		
	Good	Moderate	Budget
Wrexham Town (includes Rhosddu Industrial	2	3	1

Area	Quality		
	Good	Moderate	Budget
Estate and Pandy Business Park)			
Wrexham Industrial Estate	-	14	8
Llay Industrial Estate	4	5	2
Cefn-y-Bedd and Llay (Riverside Business Park; Alyn Industrial Estate)	2	3	3
Overton-on-Dee	-	2	2
Rhostyllen and Rhos (Coppi Industrial Estate; Bersham Enterprise Centre)	-	1	1
Total	**8**	**28**	**17**

Source: BE Group 2014

4.25 45 units are available leasehold, with a further three premises available under either freehold or leasehold terms (Table 33). Only five premises are available freehold, the majority of which are small units of less than 200 sqm. There is one medium sized industrial unit available to purchase at Riverside Business Park and a large unit of 2,023 sqm to the north of Wrexham Industrial Estate.

Table 33 – Tenure of Marketed Industrial Property

Area	Tenure		
	Leasehold	Freehold	Either
Wrexham Town (includes Rhosddu Industrial Estate)	6	-	-
Wrexham Industrial Estate	19	1	2
Llay Industrial Estate	11	-	-
North of Wrexham Town (Riverside Business Park; Alyn Industrial Estate; Llay)	4	4	-
South of Wrexham Town (Overton-on-Dee; Bersham Enterprise Centre	5	-	1
Total	**45**	**5**	**3**

Source: BE Group 2014

Offices

4.26 Table 34 shows that there are 20,093 sqm of marketed offices (84 premises) in the County Borough. This is a 36.1 percent increase from the 13,935 sqm of vacant floorspace recorded in the Wrexham Employment Sites Study (2007).

4.27 The majority of vacant supply is below the 500 sqm threshold (89 percent), though representing only 55.2 percent in floorspace area. The 101-200 sqm size band is the

most popular, containing 21 units out of the total 84. There are only five units in the 501-1,000 sqm band and only four units larger than 1,000 sqm.

4.28 Wrexham town has the greatest supply of vacant office space with 52.5 percent of the available floorspace and 38.1 percent of the available units. This is accounted for by the availability of units across the entire size ranges, and more specifically units larger than 1000 sqm. Importantly, Roxburgh House, one of the largest office premises in Wrexham town (1,486 sqm), is being marketed by the agents for a residential conversion as one of its development options.

4.29 Wrexham Industrial Estate contains 20 units spread across all units all but the 0-25 sqm band and the 1,001 sqm and over group. Wrexham Technology Park has ten vacant units, out of a stock of some 35-40 (excluding premises in medical uses), a comparatively high level of vacancy.

4.30 The remaining areas of the corresponding Table have a limited supply of office units on the market, with Llay Industrial Estate (as an example) containing only two units amounting to 132 sqm. In terms of geographic areas of Wrexham, the south west and south east region's vacant office supply is hugely restricted to Johnstown and Erbistock, amounting to 809 sqm across two units. There are no small or mid-sized office units within these areas.

Table 34 – Amount of Marketed Office Property

Area		Size Band, sqm							Total
		0-25	26-50	51-100	101-200	201-500	501-1000	1001+	
Wrexham Town (includes Pandy Business Park)	Floorspace, sqm	67	146	376	1426	1908	715	5904	10,542
	Number of Properties	3	4	5	9	6	1	4	32
Wrexham Industrial Estate	Floorspace, sqm	-	39	248	590	2670	1134	-	4681
	Number of Properties	-	1	4	4	9	2	-	20
Llay Industrial Estate	Floorspace, sqm	14	-	-	118	-	-	-	132
	Number of Properties	1	-	-	1	-	-	-	2

Area		Size Band, sqm							Total
		0-25	26-50	51-100	101-200	201-500	501-1000	1001+	
Wrexham Technology Park	Floorspace, sqm	-	-	69	620	1445	704	-	2838
	Number of Properties	-	-	1	5	3	1	-	10
Rossett (Rossett Business Park)	Floorspace, sqm	25	-	-	146	218	-	-	389
	Number of Properties	1	-	-	1	1	-	-	3
Bryn Estyn Business Centre	Floorspace, sqm	36	73	260	-	-	-	-	369
	Number of Properties	2	2	4	-	-	-	-	8
Broughton; Gwersyllt; Brymbo	Floorspace, sqm	22	-	-	108	-	-	-	130
	Number of Properties	2	-	-	1	-	-	-	3
Johnstown and Erbistock	Floorspace, sqm	-	-	-	-	260	549	-	809
	Number of Properties	-	-	-	-	1	1	-	2
Minera (Five Crosses Industrial Estate)	Floorspace, sqm	-	72	131	-	-		-	203
	Number of Properties	-	2	2	-	-	-	-	4
Total	**Floorspace, sqm**	**164**	**330**	**1084**	**3008**	**6501**	**3102**	**5904**	**20093**
	Number of Properties	**9**	**9**	**16**	**21**	**20**	**5**	**4**	**84**

Source: BE Group 2014

4.31 Table 35 shows that the majority (85.7 percent) of marketed office space in Wrexham is of moderate quality. Nearly two-fifths of the moderate quality offices is in the town of Wrexham, and nearly one-quarter is in Wrexham Industrial Estate.

4.32 There are only five good quality units and seven budget options, accounting for 6.0 percent and 8.3 percent respectively.

Table 35 – Quality of Marketed Office Property

Area	Quality		
	Good	Moderate	Budget
Wrexham Town (includes Pandy Business Park)	2	27	3
Wrexham Industrial Estate	-	17	3
Llay Industrial Estate	-	1	1
Wrexham Technology Park	-	10	-
Rossett (Rossett Business Park)	1	2	-
Bryn Estyn Business Centre	-	8	-
Broughton; Gwersyllt; Brymbo	1	2	-
Johnstown and Erbistock	1	1	-
Minera (Five Crosses Industrial Estate)	-	4	-
Total	**5**	**72**	**7**

Source: BE Group 2014

4.33 All but 12 of the available properties are to let only (see Table 36), amounting to 85.7 percent of the marketed units. Nine units are available for sale or to let, whilst only three are only freehold. These are limited to Wrexham town and Wrexham Industrial Estate.

Table 36 – Tenure of Marketed Office Property

Area	Tenure		
	Leasehold	Freehold	Either
Wrexham Town (includes Pandy Business Park)	31	1	-
Wrexham Industrial Estate	10	2	8
Llay Industrial Estate	3	-	-
Wrexham Technology Park	9	-	1
Rossett (Rossett Business Park)	3	-	-
Bryn Estyn Business Centre	8	-	-
Broughton; Gwersyllt; Brymbo	2	-	-
Johnstown and Erbistock	2	-	-
Minera (Five Crosses Industrial Estate)	4	-	
Total	**72**	**3**	**9**

Source: BE Group 2014

Flintshire Property Supply

Industrial

4.34 Table 37 shows that there is 125,038 sqm of marketed industrial floorspace, made up of 118 properties, in the study area. There is a reasonable range through the 100-1,000 sqm bands, but property sizes below 100 sqm and above 1,000 sqm are limited in comparison. By far the greatest availability is in the 201-500 sqm (40.7 percent of units) with over twice as many available units of this size, than any other size band.

4.35 Deeside Industrial Estate dominates the industrial market, with over a third of available units there and 56.9 percent of the available floorspace. With 41 vacant premises out of a stock of some 220 units in total, the vacancy rate by premises is around 19 percent. As mentioned previously, a vacancy rate of around 7-10 percent is considered healthier in terms of giving occupiers a full choice of premises types, locations, sizes and tenures. Thus Deeside Industrial Estate can be said to have had a comparatively high vacancy rate (19 percent) at the time of this study.

4.36 The Industrial Estate is the only area with availability in all size bands. 80 percent of units larger than 5,000 sqm are located at Deeside Industrial Estate. The concentration of units surrounding the Deeside area, is such that there are no vacant industrial units to the north and south of Flintshire, with no availability further west than Mold. With regards to Mold, all available units are of medium to large industrial units between 501-5,000 sqm in size.

4.37 Hawarden and Saltney are also limited in offer, providing only small units of between 101-500 sqm. Nearly a third of units within the 201-500 sqm size bracket is available in Saltney.

Table 37 – Amount of Marketed Industrial Property

Area		Size Band, sqm							Total
		0-100	101-200	201-500	501-1,000	1001-2,000	2,001-5,000	5,001+	
Buckley	Number of Properties	-	-	2	-	-	1	-	3
	Floorspace, sqm	-	-	930	-	-	4236	-	5166
Deeside (Deva Business Park;	Number of Properties	-	1	1	2	1	-	-	5

Area		Size Band, sqm							Total
		0-100	101-200	201-500	501-1,000	1001-2,000	2,001-5,000	5,001+	
Interlinq Trade Park; Pentre Industrial Estate)	Floorspace, sqm	-	199	431	1440	1001	-	-	3071
Deeside Industrial Estate	Number of Properties	1	4	14	9	7	2	4	41
	Floorspace, sqm	92	552	4404	7344	10885	6320	41520	71117
Flint (Ashmount Enterprise Park; Castlepark Industrial estate; Flint Trade Park; Manor Industrial Estate)	Number of Properties	1	8	6	1	-	3832	-	17
	Floorspace, sqm	88	1140	1575	560	-	1	-	7195
Hawarden	Number of Properties	-	1	-	-	-	-	-	1
	Floorspace, sqm	-	193	-	-	-	-	-	193
Holywell (Greenfield Industrial Park)	Number of Properties	3	1	3	2	-	-	-	9
	Floorspace, sqm	210	168	1214	1483	-	-	-	3075
Mold (Broncoed Business Park; Bromfield Industrial Park; Gwernaffield Business Park)	Number of Properties	-	-	-	4	1	1	-	6
	Floorspace, sqm	-	-	-	3291	1021	2631	-	6943
Saltney (Central Trading Estate; Borders Industrial Park; Ketlan Court)	Number of Properties	-	4	15	-	-	-	-	19
	Floorspace, sqm	-	556	5706	-	-	-	-	6262
Sandycroft (Engineer Park; Holland Park)	Number of Properties	2	3	6	-	-	2	1	14
	Floorspace, sqm	115	465	1891	-	-	5384	11835	19690
Sealand	Number of Properties	-	-	1	2	-	-	-	3
	Floorspace, sqm	-	-	437	1889	-	-	-	2326
Total	**Floorspace, sqm**	**505**	**3273**	**16588**	**16007**	**12907**	**22403**	**53355**	**125038**
	Number of Properties	**7**	**22**	**48**	**20**	**9**	**7**	**5**	**118**

Source: BE Group 2014

4.38 Table 38 shows the majority of marketed space in Flintshire is of moderate quality (72.9 percent), with 39.5 percent of these at Deeside Industrial Estate. Deeside Industrial Estate provides nearly half of the good quality units on offer (46.2 percent). Flint, Hawarden, Holywell, Mold, Saltney and Sealand have no good quality units on the market. Wrexham Industrial Estate has no good quality industrial units on the market. There are more budget options (19) compared to good quality units (13), with the largest stock at Greenfield Industrial Park, Holywell (47.4 percent).

Table 38 – Quality of Marketed Industrial Property

Area	Quality		
	Good	Moderate	Budget
Buckley	2	1	-
Deeside (Deva Business Park; Interlinq Trade Park; Pentre Industrial Estate)	2	3	-
Deeside Industrial Estate	6	34	1
Flint (Ashmount Enterprise Park; Castlepark Industrial estate; Flint Trade Park; Manor Industrial Estate)	-	14	3
Hawarden	-	1	-
Holywell (Greenfield Industrial Park)	-	-	9
Mold (Broncoed Business Park; Bromfield Industrial Park; Gwernaffield Business Park)	-	6	-
Saltney (Central Trading Estate; Borders Industrial Park; Ketlan Court)	-	18	1
Sandycroft (Engineer Park; Holland Park)	3	9	2
Sealand	-	-	3
Total	**13**	**86**	**19**

Source: BE Group 2014

4.39 98 units are available leasehold, with a further 15 premises available under either freehold or leasehold terms (Table 39). Only five premises are available strictly on a freehold basis.

Table 39 – Tenure of Marketed Industrial Property

Area	Tenure		
	Leasehold	Freehold	Either
Buckley	1	-	2

Area	Tenure		
	Leasehold	Freehold	Either
Deeside (Deva Business Park; Interlinq Trade Park; Pentre Industrial Estate)	5	-	-
Deeside Industrial Estate	35	2	4
Flint (Ashmount Enterprise Park; Castlepark Industrial estate; Flint Trade Park; Manor Industrial Estate)	16	1	-
Hawarden	-	1	-
Holywell (Greenfield Industrial Park)	9	-	-
Mold (Broncoed Business Park; Bromfield Industrial Park; Gwernaffield Business Park)	6	-	-
Saltney (Central Trading Estate; Borders Industrial Park; Ketlan Court)	12	-	7
Sandycroft (Engineer Park; Holland Park)	11	1	2
Sealand	3	-	-
Total	**98**	**5**	**15**

Source: BE Group 2014

Offices

4.40 Table 40 shows that there are 8,991 sqm of marketed offices (59 premises) in the County. The majority of vacant supply, as with Wrexham, is below the 500 sqm threshold (90.5 percent), and representing 67.4 percent of total available floorspace. The 0-25 sqm band is the most popular. Importantly Chesterbank Business Park at Saltney provides all but one of the units within this size bracket. Other than Saltney, Sandycroft is the only other area in the County to provide available units of less than 25 sqm. Marketed office space of larger than 1,000 sqm is non-existent within the County.

4.41 Saltney has the greatest number of available office units (over a third of all units), whilst Mold provides the greatest floorspace (29.5 percent). Deeside Industrial Estate provides just over a tenth of vacant office units corresponding to 18.7 percent of total floorspace. This reflects one agent's comments with regards to the office market being restricted to within industrial units at Deeside Industrial Estate.

4.42 The areas of Broughton, Holywell and Higher Kinnerton only have one available unit, whilst Flint and Sandycroft have two available units. Of these areas, only Sandycroft provides opportunity to rent a small office unit, whilst the others offer only mid-sized properties.

Table 40 – Amount of Marketed Office Property

Area		Size Band, sqm							Total
		0-25	26-50	51-100	101-200	201-500	501-1000	1001+	
Broughton	Floorspace, sqm	-	-	-	-	291	-	-	291
	Number of Properties	-	-	-	-	1	-	-	1
Deeside	Floorspace, sqm	-	-	212	111	295	1,061	-	1,679
	Number of Properties	-	-	3	1	1	2	-	7
Deeside Industrial Estate	Floorspace, sqm		68	217	341	-	1,299	-	1,925
	Number of Properties	-	2	3	3	-	2	-	10
Flint	Floorspace, sqm	-	-	-	185	758	-	-	943
	Number of Properties	-	-	-	1	2	-	-	3
Higher Kinnerton	Floorspace, sqm	-	-	-		315	-	-	315
	Number of Properties	-	-	-	-	1	-	-	1
Holywell	Floorspace, sqm	-	-	-	-	215	-	-	215
	Number of Properties	-	-	-	-	1	-	-	1
Mold	Floorspace, sqm	-	-	237	576	1,266	570	-	2,649
	Number of Properties	-	-	3	4	4	1	-	12
Saltney	Floorspace, sqm	187	177	-	264	253	-	-	881
	Number of Properties	13	5	-	2	1	-	-	21
Sandycroft	Floorspace, sqm	25	68	-	-	-	-	-	93
	Number of Properties	1	2	-	-	-	-	-	3
Total	**Floorspace, sqm**	**212**	**313**	**666**	**1,477**	**3,393**	**2,930**	**-**	**8,991**

Area		Size Band, sqm							Total
		0-25	26-50	51-100	101-200	201-500	501-1000	1001+	
	Number of Properties	**14**	**9**	**9**	**11**	**11**	**5**	**-**	**59**

Source: BE Group 2014

4.43 A huge 96.6 percent of units in Flintshire available property market is of moderate quality, with the remaining 3.4 percent of budget quality, provided at Broughton and Deeside (Table 41). There is no good quality office stock on the market.

Table 41 – Quality of Marketed Office Property

Area	Quality		
	Good	Moderate	Budget
Broughton	-	-	1
Deeside	-	6	1
Deeside Industrial Estate	-	10	-
Flint	-	3	-
Higher Kinnerton	-	1	-
Holywell	-	1	-
Mold	-	12	-
Saltney	-	21	-
Sandycroft	-	3	-
Total	**0**	**57**	**2**

Source: BE Group 2014

4.44 As with the quality of office units in Flintshire, the tenure is stark from leasehold to freehold availability (Table 42) 94.9 percent of office units are leasehold only, with a further one unit of both leasehold and freehold tenure. Only two units at Deeside Industrial Estate are available on the freehold market.

Table 42 – Tenure of Marketed Office Property

Area	Tenure		
	Leasehold	Freehold	Either
Broughton	1	-	-
Deeside	5	2	-
Deeside Industrial Estate	10	-	-

Area	Tenure		
	Leasehold	Freehold	Either
Flint	3	-	-
Higher Kinnerton	1	-	-
Holywell	1	-	-
Mold	11	-	1
Saltney	21	-	-
Sandycroft	3	-	-
Total	**56**	**2**	**1**

Source: BE Group 2014

Valuation Office Agency Data

4.45 The Valuation Office Agency (VOA) provides data on hereditaments at MSOA level. Hereditaments are premises liable for business rates. They can be a group of buildings, a single building or a property within a building. It gives a good indication of how many business premises (and floorspace) there are in the area.

Industrial

4.46 According to the latest VOA statistics (2008) there are 1,462 industrial premises in Wrexham totalling some 1,577,000 sqm and 1,844 industrial premises in Flintshire equating to circa 2,045,000 sqm. Of this space 62,876 sqm across 53 premises are being marketed in Wrexham (see Table 30) and 118 premises totalling 125,038 sqm in Flintshire (Table 37). This suggests an overall 'occupancy rate' of 96.0 percent and 93.9 percent by floorspace for Wrexham and Flintshire, respectively. By premises numbers, the 'occupancy rate' is 96.4 percent and 93.6 percent respectively, for Wrexham and Flintshire.

4.47 It should be noted that, even in the most robust property market there will be a steady churn of premises as companies expand/contract and relocate. There is no definitive view on what a healthy rate of 'churn' should be, but a vacancy rate of 7-10 percent is considered reasonable in terms of giving occupiers a choice of premises types, locations, sizes and tenures. If vacancy rates are lower businesses may not be able to access the property options they need. Higher rates may suggest an oversupply of premises relative to demand.

4.48 In terms of industrial premises Wrexham has a vacancy rate of 4 percent by floorspace, 3.6 percent by premises numbers. This is a rather low rate of overall

availability. In comparison the vacancy rates of Flintshire, 6.1 percent and 6.4 percent, appear somewhat closer to the norm.

Offices

4.49 There are 526 and 724 office hereditaments in Wrexham and Flintshire, respectively. These total 119,000 sqm in Wrexham and 156,000 sqm in Flintshire. Of this space there are 84 marketed premises totalling 20,093 sqm in Wrexham (see Tables 34 and Table 40 above) and 59 marketed premises totalling 8,991 sqm in Flintshire. This reflects an overall 'occupancy rate' of 83.1 percent and 94.2 percent by floorspace for Wrexham and Flintshire, respectively. By premises numbers the overall 'occupancy rate' for Wrexham is 84.0 percent and for Flintshire is 91.9 percent.

4.50 In terms of office premises Wrexham has a vacancy rate of 16.9 percent by floorspace, 16 percent by premises numbers. This is quite a high vacancy rate and may indicate an element of oversupply in the current stock. As mentioned the main office scheme of the County Borough, Wrexham Technology Park, appears to have a high vacancy rate at present as well.

4.51 In comparison the vacancy rates of Flintshire, 6.3 percent and 8.1 percent, again appear somewhat closer to the norm.

Modern Occupier Needs and the Emerging Property Trends

4.52 BE Group through its long experience operating in the commercial property market across the UK, as well as in the study area specifically, understand market perceptions and the conditions facing the industrial and office sectors. The following sub-sections draws upon this market experience, providing a brief commentary on modern occupier needs and emerging trends within both sectors.

Modern Occupier Needs

4.53 In this sub-section the report outlines what modern businesses are looking for in terms of their property, as well as those developers providing space for them.

4.54 There are two key property sub-markets to consider in understanding the demand for premises. The first is the demand from companies looking for premises for their own occupation; the second, which is necessarily derived from the first, comes from

specialist property developers who will provide solutions for these companies.

4.55 Many end-user companies, especially small ones, looking for accommodation prefer occupying an existing building to either organising the construction of one for themselves or entering into a design and build agreement with a developer. This is due to the management time involved and the long lead-in whilst premises are built; while it may also be difficult to rationalise and visualise such an important acquisition off-plan.

4.56 Having premises built for owner occupation requires a long lead-time to cover the planning, negotiation and construction time involved often greater than 12 months. Furthermore not every company wants a brand new building, partly because they are generally more expensive than second-hand ones.

4.57 Experience shows today companies want well located, accessible space. Specification, parking, external loading and the quality of the immediate environment will all be factored into the decision to acquire.

4.58 However the recent combination of low interest rates and the depressed stock market has led to an unusually large number of companies looking to own their premises (although current market conditions have softened this due to the lack of available finance). One route to achieving this is by developing their own site, especially if they cannot find a suitable freehold property. Nationally most requests for such small sites to enable self-build are of less than 0.4 ha in size.

4.59 Although design and build options can be convenient, they are quite expensive because the controlling developer makes its profit not only on the land sale, but also on managing the building process. Consequently if the company is able, some prefer to buy land direct and organise building contractors themselves. This is especially the case with lower value added industries where high quality buildings are of secondary importance. However without strong planning control this scenario can lead to business areas of lower aesthetic value and layout.

4.60 Developers acquiring sites consider the nature of the market, as outlined above, as well as the potential for speculative development, i.e. riskier, supply-led, rather than demand-driven construction. They also prefer to acquire prominent, (easy to

develop) greenfield sites close to arterial roads or motorways because irrespective of sustainable transport policies, private transport still predominates. They naturally want land that is attractive to end-users. Furthermore property development is intensely entrepreneurial and extremely price sensitive. So although land may be available on the open market, if it is at too high a price, then the developer will not acquire it.

Emerging Property Trends

Industrial

4.61 Occupiers are generally looking for smaller premises as average company size continues to decrease. In line with rising aspirations and a concentration on higher value added activities, companies are looking for higher quality accommodation. In rural areas company sizes are generally already small; and the desire for high quality is less of a priority due to affordability issues. Successful industrial businesses typically require dedicated, self-contained, secure yard areas, and for units around 2,000 sqm the trend seems to be at least one dock level loading bay and a 40 metre turning circle to allow heavy goods vehicles access into and out of the unit. Eaves heights are also continuing to rise from an average of six metres to more towards ten metres to allow storage racking and more efficient use of space. For B8 high bay warehousing eaves heights can now be 15 metres to accommodate automatic racking systems.

4.62 Large requirements, above 10,000 sqm, are comparatively rare, and where they do exist are generally for distribution warehousing. Most of these are contract-led with a flurry of activity as a number of specialist distribution companies look for units, before one of them secures the contract on offer. However these companies generally cannot wait for a bespoke warehouse to be built for them and so, due to the rarity of such large, available buildings their search areas are increasingly wide.

4.63 In the manufacturing sector, increasing automation may be reducing employment but it does not follow that the land needs of this sector are reducing as automated processes frequently take up as much space as manual ones.

4.64 Prior to the recession freehold demand was relatively strong as a result of low interest rates, poor stock market pension performances and increased private sector

interest in property investment. This position is gradually returning and demand for freehold sites/premises growing. Due to the complexity and expense of the process only larger businesses are investing in new design and build developments, but even smaller firms can now aspire to own their own second-hand unit. Existing freehold supply only rarely meets demand

4.65 Outsourcing of many aspects of the production and distribution process has led to a declining need for traditional, large scale, all-encompassing manufacturing facilities. This is gradually being replaced by smaller, sub-assembly light manufacturing space, which can be accommodated on sites of up to 4 ha. Shorter leases (five years) and break clauses (three years) are now becoming much more common.

Offices

4.66 For offices the trend is for smaller suites as average business sizes fall. There are two strands to this. Micro-businesses (those with less than ten employees) often want serviced offices or similar types of easy-in, easy-out schemes that lower their risk of exposure. Small businesses (with 10-49 employees) typically are looking for offices in the region of 150-300 sqm. Often they are satellite facilities for larger companies.

4.67 Improving technology means specifications are changing, for example wireless networks may soon make raised floors superfluous and make the conversion of older buildings, such as Redwither Tower, Wrexham Industrial Estate easier. Changes in working practices also means that floorspace requirements through home working, hot-desking, and increased densities are reducing

4.68 In line with rising aspirations and a concentration on higher value added activities, successful companies are looking for higher quality accommodation. For example air conditioning is becoming almost a standard requirement in new schemes, which pushes up rentals by £5-10/sqm on average. Furthermore some occupiers (looking for more than 200 sqm) increasingly want self-contained premises, i.e. their own front door, toilets, reception, utilities, etc. This has which has implications for land needs. Access to technology (Superfast broadband) is key to the success of this element of the property market.

4.69 Car parking remains a significant demand for occupiers. There is increasing demand

for relatively short leases (one to three years), which helps account for the increasing popularity of serviced offices. In many cases, new buildings are not commanding the higher rents that they once did, and are more in line with secondary space

4.70 Prior to the credit crunch, freehold demand was strong. However, as with the industrial market, the recession and lack of available finance is constraining this sub-market and has largely eradicated speculative development, outside of major city centres. Again, where there is demand, the lack of available premises is a factor in suppressing the market, and in both areas there is only five freehold-only offices on the market.

4.71 Occupiers requiring higher skills, especially those linked to key growth sectors will be concerned about access to an appropriate pool of skilled labour, which can drive demand towards city centres, research facilities and higher education institutes.

4.72 Property will need to be increasingly flexible to accommodate research-based manufacturing space as more complex processes develop, but still within an office environment.

4.73 As well as flexibility, occupiers are looking for clustering as a means of strengthening their businesses, and the need to be located close to complimentary services or suppliers has become increasingly important, both in lowering costs and creating strength in numbers. Clustering around like-minded companies will also drive demand to key business park locations, with good availability of 'white collar', knowledge-based, skilled staff. Other businesses will require central urban locations such as the professions and creative industries, where face-to-face contact is important or where public transport is important to attract staff.

Summary

4.74 The Welsh Government receives more enquiries for industrial space than for offices; and fewest for sites. Most industrial and office enquiries are for units up to 464 sqm. Industrial premises in excess of 9,291 sqm are also popular across both Counties. The greatest land demand is for sites of up to 2.02 ha.

4.75 WCBC receives more enquiries for industrial space than for office; and fewest for land and development sites. Most industrial enquiries are for units up to 93 sqm; and

for sites up to 0.5 ha. The majority of enquiries are for Wrexham as a general location, whilst Wrexham Industrial Estate also receives a large number of enquiries.

4.76 Flintshire contains 125,038 sqm of available industrial floorspace across 118 properties, approximately twice the number of available industrial floorspace and premises than Wrexham (62,876 sqm across 53 premises). This is mainly attributed to available units at Deeside Industrial Estate. In contrast, Wrexham has twice the office floorspace, 20,093 sqm compared to 9,761 sqm, with the majority of this due to vacant offices and whole office buildings within the town centre. There is a rise of 36.1 percent of marketed industrial floorspace in Wrexham and a decrease of 3.3 percent of vacant office floorspace, compared to the 2007 Employment Sites Study.

4.77 Across the study area, there is more than six times as much industrial floorspace available as there is office (187,914 sqm compared to 29,854 sqm). Again this is due to the dominance of Deeside Industrial Estate, and the fact that industrial units are generally larger than offices. Most of the vacancy is concentrated in existing industrial estates in both Counties, such as Wrexham Industrial Estate and Deeside Industrial Estate. However, overall vacancy rates for industrial property are higher at Deeside Industrial Estate, at around 19 percent, than at Wrexham Industrial Estate, at 5 percent. If 7-10 percent is considered a normal rate of vacancy then Wrexham Industrial Estate appears have an insufficient supply of available property options while Deeside Industrial Estate is somewhat oversupplied. Both Counties have a limited supply of vacant units outside of the periphery of the main town areas, such as in the more rural locations to the west.

4.78 There is a reasonable size range of marketed industrial floorspace in Wrexham, though a somewhat moderate supply at the larger end of the scale – 1,001 sqm and over. Even with twice the amount of vacant industrial stock, proportionally, Flintshire also has a limited number of units in excess of 1,000 sqm. By far the greatest availability of industrial stock within both the Counties is in the 100-200 sqm and 200-500 sqm brackets, whilst for offices it is below the 500 sqm threshold size band.

4.79 Over three-quarters of vacant industrial and office units across the study area are of moderate quality. Wrexham provides a better split across the board of vacant units, in terms of good, moderate and low quality units in comparison to Flintshire. Looking at the authorities individually, moderate industrial and office space in Wrexham

accounts for 52.8 percent and 85.7 percent, respectively. In Flintshire, the level of moderate industrial and office premises is 72.9 percent and 96.7 percent. Notably, only 8.2 percent of the available property within the study area is considered to be of good quality, with no good quality office space in Flintshire.

4.80 There is a lack of freehold options of both industrial and office accommodation across the study area (43 units are being marketed equivalent to 13.6 percent). Only eight industrial units are available for sale in Wrexham and 20 in Flintshire. An even lower number of office units are available to buy: three in Wrexham and 12 in Flintshire.

4.81 The overall occupancy rate for the study area is 94.8 percent by industrial floorspace and 94.8 percent by industrial premises numbers. For the office market, the overall occupancy rate is 89.8 percent by floorspace and 88.4 percent by premises number. It should be noted that the latest VOA data used here is from April 2008, whereas the vacancy data is current to March 2014. Individually and respectively, Wrexham and Flintshire have an occupancy rate of 96.0 percent and 93.9 percent by industrial floorspace. By industrial premises number, the occupancy rate is 96.4 percent and 93.6 percent, respectively for Wrexham and Flintshire. With regards to office floorspace and premises, Wrexham has an occupancy rate of 83.1 percent and 84.0 percent, respectively. Flintshire's occupancy rate for office floorspace and premises is 93.7 percent and 91.6 percent, respectively.

4.82 In terms of industrial premises Wrexham has a vacancy rate of 4 percent by floorspace, 3.6 percent by premises numbers. This is a rather low rate of overall availability. In comparison the vacancy rates of Flintshire, 6.1 percent and 6.4 percent, appear somewhat closer to the norm of 7-10 percent.

4.83 In terms of office premises Wrexham has a vacancy rate of 16.9 percent by floorspace, 16 percent by premises numbers. This is quite a high vacancy rate and may indicate an element of oversupply in the current stock. As mentioned the main office scheme of the County Borough, Wrexham Technology Park, appears to have a high vacancy rate at present as well.

4.84 In comparison the vacancy rates of Flintshire, 6.3 percent and 8.1 percent, again appear somewhat closer to the norm.

4.85 Modern businesses and developers want easily developable, accessible and usually prominent sites for their premises. A healthy property market should provide a mix of options including speculative developments; design and build schemes, and freehold plots for owner occupiers to self-build. However, property development is entrepreneurial and not all companies that are looking for space can realistically be satisfied all the time. The property market, by nature, is inherently imperfect. Companies will, however, generally seek to move from existing property to provide themselves with better, more efficient, cost effective accommodation of an approximate size.

4.86 Modern trends are expected to lead to a greater number of businesses that are smaller in size, which are more dynamic and technology driven and which will come and go more fluidly.

5.0 PROPERTY MARKET – ANALYSIS

Introduction

5.1 This section considers the more detailed issues related to supply and demand for industrial and office property within the study area as a prelude to assessing the future need for land. The comments of stakeholders active in Wrexham and Flintshire's industrial and office property markets are analysed. The industrial market refers to accommodation for manufacturing, storage, distribution and warehousing purposes including smaller workshop premises.

5.2 10 private sector stakeholders were contacted by telephone for an informal discussion of the property market. Responses were obtained from two national investors, three regional agents and two local agents. To protect anonymity of individuals, names of commentators are not revealed. The consultees were:

- Beresford Adams
- Bolton Birch
- Guy Woodcock
- Hurstwood
- Jones Lang LaSalle
- Knight Frank
- Legat Owen
- Lambert Smith Hampton
- Mason Owen
- Prospect Estates.

5.3 These are stakeholders who are actively engaged in the sale and/or lease of industrial and office premises 'on the ground' and so have good firsthand knowledge of the market in Wrexham and Flintshire. The views they give provide useful practical input which balances the higher level evidence provided by forecasting and policy analysis.

5.4 Stakeholders were contacted by telephone, or face-to-face, to undertake a semi-structured interview which focused on the following general questions:

- What units are you currently marketing? What are businesses looking for?

- Review property offer – office, industrial, land – is there enough property and is it good enough quality?
- Are they mainly freehold or leasehold – is there a shortage of either one of these?
- How quickly are units letting? What are popular sizes? What sizes do not find occupiers?
- Are certain areas more popular than others?
- Is there enough land? Where should further land be allocated?
- Property requirements of emerging businesses and sectors? Any noticeable trends, e.g. increasing need for quality, smaller units, etc?
- Weaknesses and shortfalls in existing offer – what can be done about it?
- Are there any key aspects that the Council needs to address? What is the private sector's perception of the place? How is Wrexham and Flintshire viewed in terms of inward investment?

5.5 However, discussions were comparatively informal and not all stakeholders could fully answer all questions. For example, few were able to give views on inward investment and this issue is therefore considered elsewhere in the study.

5.6 Their views have been summarised in a series of tables. Table 43 provides a breakdown of the general comments received with regard to conditions within the Counties as a whole. Where specific reference to Wrexham and Flintshire's market is made, this is highlighted.

Table 43 – Property Market Comments – General Comments

Contact	Comment
Regional Agent	Property market has picked up recently, with more enquiries being received and more of these being converted into occupations The quality and amount of stock in both Counties are diminishing – this will be a threat in the future if it is not addressed now. Speculative development has not been viable for the last six years There is an equal demand of both freehold and leasehold property There is no area that is more popular, with enquiries being received across the board – therefore no trends are coming through Units are letting at a varied space with some units turning over quickly. In comparison some units have been on the market for a number of years Provision for the telecoms sector can be an issue The Councils can address business rates and rate exemptions to ensure the market remains buoyant, and this would be a massive

Contact	Comment
	help. This has to be a simple process, not bureaucratic and not lengthy. Also other factors such as funding for start-up costs would help the market Deeside and Wrexham Industrial Estate are world class and ensure the private sector perception is positive. With major occupiers such as JCB, Airbus, Tata Steel, Kellogg's, Toyota etc, the area has to be viewed as successful. The pull of these occupiers for other investors is strong With regards to threats from Chester, the markets are interchangeable. Ellesmere Port does not have a high quality market, and therefore does not present a threat. Wirral International Business Park comprises good quality units, and may be a threat. Areas in Merseyside and Manchester are too far to be considered a threat to investment.
National Investor	Own circa 92 units at Wrexham Industrial Estate, 26 of these units are located at Bridgeway Centre. Units at the Industrial Estate can be merged or split Generally the market in the Counties has picked up following the proposed development of the 'super-prison' at Wrexham They argue that Deeside Industrial Estate is their most popular area, due to its good location. Units have been fully let since they owned them, in 2006. Occupiers continue to renew leases on the Estate. *[However, it is noted that the scheme here comprises only 12 units compared to the 92 noted above, thus the two are not necessarily comparable]* With regards to Wrexham, accessibility in the area has improved which has increased the flow of traffic at Wrexham Industrial Estate. Enquiries here have picked up as a result of infrastructural investment
National Investor	Own all the units at Bersham Enterprise Centre in Wrexham which only has one vacant unit out of the 17 The market has remained the same for the owners – same level of enquiries and conversions The market is performing averagely – mix of units all over the country that are performing better and worse than the units owned by them at Wrexham.
Local Agent	With regards to Wrexham, around half of the enquiries are for units at Wrexham Industrial Estate, whilst 20 percent are for Llay Industrial Estate and the rest are for other locations in the County Borough

Source BE Group, 2014

5.7 Table 44 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

Table 44 – Property Market Comments – Industrial

Contact	Comment
Regional Agent	Industrial size enquiries vary, but generally popular sizes are sub-929 sqm Quality and amount of units are diminishing at a quick pace, and this

Contact	Comment
	needs to be addressed Offer short term licence agreements on some industrial schemes, to ensure attractiveness
National Investor	***Wrexham Industrial Estate*** Own circa 92 units at Wrexham Industrial Estate. Achieving rents of £43/sqm There is interest in seven of the vacant units under their ownership. Overall vacancy at Wrexham Industrial Estate is felt to be around 5 percent *[which conforms with the vacancy rate shown in Section 4.0 of this study]* Units range from 139-465 sqm Offer flexible lease terms but generally lease terms are set at 5 years There is a good enough quality as it stands (which includes second hand refurbished units), but a shortage of units for the enquiries that are being received There is some demand for industrial units at the smaller end, circa 500 sqm and mid-ranged units at 139-372 sqm. But the majority of the demand is for 929-1,858 sqm.
National Investor	Offering industrial units at £54/sqm Lease terms from 12 months to 3 years Industrial market in Wrexham and Flintshire has remained the same over the last couple of years
Local Agent	***Wrexham Industrial Estate*** Wrexham Industrial Estate has a shortage of readily available land on which to create an 'offer' for the future marketing of the estate. Many smaller sites on the Estate are constrained by ecology, while big sites have been lost to the Prison and, in the east, the power station proposal. Land to the north of this has permission, won at appeal, for a Norbert Dentressangle facility. Demand for land at the Estate is strong, and includes requirements from a number of existing businesses with expansion needs. Such companies are looking for sites of 2.0-4.0 ha. They also receive regular enquiries for 0.4 ha from small businesses (30-40 employees) looking for design and build opportunities for owner occupation. This demand is partly driven by a lack of freehold property in the area but also reflects the desire of business owners to make personal property investments. Premises demand is high compared to supply. For the above reasons, there is a need to allocate further land around Wrexham Industrial estate to allow future growth of the estate and provide sites which can meet both the needs of existing firms and be marketed to future inward investors.

Source BE Group, 2014

5.8 To understand agent and developer comments in more detail, the performance of multi-let industrial schemes in Wrexham and Flintshire are compared. Details are shown in Tables 45 and 46. The multi-let schemes are not a totally comprehensive list; it is a selected sample as it is not always possible to identify all existing schemes.

Nor is it always possible to obtain the required information on all schemes, e.g. some landowners will not co-operate. However, this remains a good sample of the schemes within the study area.

Table 45 – Wrexham Selected Industrial Schemes Performance

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
Bersham Enterprise Centre	1,826 17 units	74-186	94	One unit available Modern studio, business and starter units self contained single storey terraced units around a central courtyard Lease terms of 12 months to 3 years
Bridgeway Centre, Wrexham Industrial Estate	TBC 30 units	19-511	87	Rents of £22/sqm Interest in two of the four units that are vacant Flexible lease terms on offer
Alyn Industrial Estate	2,132 7 units	145-762	86	Units comprise workshops and warehouses Rents circa £40-50/sqm One unit available to lease
Bryn Business Centre	TBC 19	44-287	68	Offers starter units Design and build opportunities available Short term licence agreements 100 percent rates relief on some units Rent varies from circa £22-43/sqm

Source BE Group, 2014

Table 46 – Flintshire Selected Industrial Schemes Performance

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
Ashmount Enterprise Park	TBC 43 units	93-557	TBC	Units are available on all inclusive licences from £845 per month

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
				Traditional leases are also available Units available
Engineer Park, Deeside	9,290 38 units	46-929	87	Units available Located within the Deeside Enterprise Zone Park was constructed by Welsh Development Agency Rent levels range from £43-86/sqm
Evans Business Centre	TBC 41 units	47-186	78	Scheme comprises 17 workshops and 24 offices units across four terraced blocks Nine units are available. Of these three are workshops Easy-in, easy-out terms, 2 month notice periods
Flint Trade Park	2,051 14 units	102-408	64	Trade counter units to let or for sale Two terraces of self contained units Units available
Ketlan Court, Saltney	2,833 14 units	139-424	64	Modern industrial development arranged in a series of three terraces Some units have been modified to include offices Rents at circa £50/sqm Units available
Central Trading Estate, Saltney	TBC 18 units	359-456	39	Factory outlet/trade counter units arranged in a terrace Single storey open plan units Units available for sale or to let

Source BE Group, 2014

5.9 Table 47 provides a summary of the comments received on the local property market.

Table 47 – Property Market Comments – Office

Contact	Comment
Regional Agent	The take-up has improved in the previous 6 months There is some good quality office space on offer In terms of the demand – freehold and leasehold property enquiries are relatively equal Wrexham – The office market is divided into two areas – the town centre and the industrial estate. The town centre office market is of limited supply, and is receiving limited demand. The industrial estate is seeing a limited office supply, and is generally restricted to occupiers already located at the industrial estates Wrexham – In terms of location, the Technology Park is the most popular area There are no identifiable trends emerging though enquiries are generally no more than 465 sqm. The bulk of enquiries are for 93-186 sqm The pull of Chester is strong, with large companies such as Tetra Pak relocating from Wrexham All enquiries are from local companies – no regional, national or international enquiries being received Moneypenny dominate the office market, having recently taken up another office of 372 sqm at Edison Court In terms of constraints, cannot identify any as such – there is good infrastructure and road connections.
Regional Agent	Popular size ranges from 93-465 sqm, though enquiries have ranged from small to large requirements Achieving rents in the region of £160/sqm

Source BE Group, 2014

5.10 To understand demand in more detail, the performance of selected multi-let office schemes is shown in Table 48 and Table 49. Again the multi-let schemes shown are a selected sample.

Table 48 – Wrexham Selected Office Schemes Performance

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
Wilkinson Business Park, Wrexham Industrial Estate	5571 22 units	18-567	59	9 units are available Unit 2 of the scheme is not yet built Mix of companies occupy the Business Park – house builder, IT company, automotive company

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
				Rents at £108/sqm Lease terms from 12 months upwards
Edison Court, Wrexham Technology Park	2,787 14 units	31-372	50	Lease terms from 12 months and upwards Achieving £129-151/sqm Units can be let individually or adjacent units can be interconnected at ground or first floor levels
Rossett Business Village	146 4 units	10-78	50	Properties have been on the market for a number of years, receiving a lack of interest and is difficult to let Property being offered at both tenures Rents approximately £220/sqm
Pembroke House, Wrexham Technology Park	929 5 units	116-232	40	697 sqm of available space remaining Achieving rents of £135/sqm There is interest in 465 sqm of floorspace, equivalent to two of the larger units
Rosehill, Erbistock	476 10 units	19-57	0	Property is a recently converted barn scheme, set in a rural location and has just come to the market High speed broadband connection available Rents of £162/sqm

Source BE Group, 2014

Table 49 – Flintshire Selected Office Schemes Performance

Property Scheme	Total Floorspace, sqm and Number of Units	Unit Size Range, sqm	Occupancy Rate, percent	Comments
Evans Business Centre	TBC 41 units	32-304	78	Scheme comprises 17 workshops and 24 offices units across four terraced blocks Nine units are available. Of these six are offices Easy-in, easy-out terms, 2 month notice periods
Viscount House, Saltney	TBC 28 units	10s-48	75	Rent levels £161/sqm all inclusive Flexible lease terms from 6 months upwards
Saltney House, Chesterbank Business Park	372 14 units	12– 138	14	Scheme offers easy in, easy out lease terms, offering monthly licenses Rents from £54/sqm Scheme is dilapidated and has been on the market for some time

Source BE Group, 2014

Summary

5.11 Understanding of the local market was informed by a number of consultees including five local property agents. Discussions focused on the level of sales and rental activity, the broad locational distribution of demand and the anticipated future trends and requirements.

5.12 All of the agents stated that the current economic conditions are having, or have had, a considerable impact upon the market conditions in general due to a lack of finance to enable growth. Though the level of enquiries have picked up since 2013, the level of conversions remain the same for the majority of agencies. One agency described the upturn in Wrexham's property market, a result of key investments such as the

super-prison. All consultees were in conformity with the success and popularity of Deeside Industrial Estate, with only one agent stating that Wirral could be a threat to the area.

5.13 The general consensus is that demand is predominately for mid-sized units in the region of 929 sqm, and small office units of circa 93-186 sqm. The industrial market is also faring better than the office market within the study area.

5.14 Flexible lease terms are the norm across the board, not only for the Counties, but nationally to ensure units stay attractive to prospective tenants and owners. In terms of tenure of leases, there is an equal demand for freehold and leasehold property.

5.15 In terms of location, areas within the main urban areas of Wrexham town including Wrexham Industrial Estate and Deeside including Deeside Industrial Estate are the most popular, with popularity decreasing the further you travel from the main centres. In the case of both the Counties, a 10 mile journey from the main town centre will ensure the office and industrial availability is non-existent.

5.16 Table 45 and Table 46 shows that the study area's industrial schemes are performing moderately – with half of the schemes in Wrexham and Flintshire reporting over 75 percent of space occupied. The office schemes in Table 37 and Table 38 are not performing as well as the industrial portfolio – only two schemes report occupancy levels of 75 percent or more.

6.0 EMPLOYMENT LAND

6.1 This section looks at the existing portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Wrexham and Flintshire need a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. Having initially established how much land there is, the second task is to consider how much is needed in the future (to 2030), which is examined in the forecasting section later in the report.

6.2 In calculating the existing land supply and future needs from now until 2030 it is important to set a base date for the analysis. The base date for the employment land supply analysis (which differs from the base dates used for forecasting) is 31st March 2014. This means that any employment planning permissions approved after 1st April 2014 do not affect the identified land supply, neither do any site completions which occurred after that date.

Wrexham Land Supply Baseline

6.3 The starting point for the supply side assessment is the Wrexham UDP, which allocated 39 sites for future employment development under Policy E1. Table 50 details these employment land allocations.

Table 50 – Wrexham Employment Allocations

Ref Number	Location	Original Area (ha)	Residual Area at March 2014 (ha)
Wrexham Industrial Estate			
1	Abbey Road	1.40	Developed/unavailable
2	Abenbury Way	1.70	1.70
3	Ash Road South (i)	2.60	Developed/unavailable
4	Ash Road South (ii)	7.30	7.30
5	Ash Road South (iii)	0.80	Developed/unavailable
6	Bryn Cottages	3.60	3.60
7	Bryn Road	9.50	3.65
8	Clywedog Road North	1.90	1.90
9	Clywedog Road East	2.20	2.20
10	Clywedog Road South (i)	3.30	1.21
11	Clywedog Road South (ii)	5.00	1.96

Ref Number	Location	Original Area (ha)	Residual Area at March 2014 (ha)
12	Clywedog Road South (iii)	6.50	6.50
13	Coed Aben Road	2.60	0.17
14	Dunster Road	1.50	0.80
15	Maelor, Bedwell Road	2.90	2.90
16	Redwither (i)	2.10	Developed/unavailable
17	Redwither (ii)	0.90	0.90
18	Redwither (iii)	2.10	Developed/unavailable
19	Redwither (iv)	0.90	0.90
20	Redwither (v)	3.30	2.85
21	Ridley Wood Road	3.30	3.30
Wrexham Industrial Estate Sub Total		***65.4***	***41.84***
Elsewhere in Wrexham			
22	Acrefair: Wynnstay Industrial Estate	1.40	1.40
23	Gresford: Industrial Estate	1.10	1.10
24	Johnstown: Vauxhall Industrial Estate	2.50	0.71
25	Llay: Industrial Estate (i)	3.30	3.30
26	Llay: Industrial Estate (ii)	2.90	2.90
27	Llay: Industrial Estate (iii)	0.40	Developed/unavailable
28	Llay: Industrial Estate (iv)	1.40	1.40
29	Llay: Industrial Estate (v)	1.20	1.20
30	Llay: Industrial Estate (vi)	0.80	0.47
31	Llay: Industrial Estate (vii)	7.50	6.40
32	Rhosllannerchrugog: Coppi Industrial Estate, Hall Lane	0.40	0.40
33	Rhostyllen: Croesfoel Industrial Estate	1.30	Developed/unavailable
34	Rhosymedre: Plas Kynaston	0.60	Developed/unavailable
35	Wrexham: Pandy Industrial Estate	1.10	0.70
36	Wrexham: Queensway Industrial Estate	0.50	Developed/unavailable
37	Wrexham: Rhosddu Industrial Estate	1.70	0.90
38	Wrexham: Technology Park	5.30	Developed/unavailable
39	Wrexham: Ruthin Road Development Area	15.20	8.80
Elsewhere in Wrexham Sub Total		***48.60***	***29.68***

Ref Number	Location	Original Area (ha)	Residual Area at March 2014 (ha)
Overall Total		**114.0**	***71.52***

Source: Wrexham County Borough Council, 2006

6.4 The thirty sites originally totalled 114.00 ha. Development between 2005 and 2014, together with land set aside for ecological mitigation in association with these developments has reduced the amount of allocations to 71.52 ha.

6.5 32.2 ha of land is also allocated at Wrexham Industrial Estate for a major single user employment project (Single User Site) that requires a site of over 30 ha for an employment that cannot be accommodated on allocated land with planning permission (UDP Policy E3). The present circumstances of that site are discussed in more detail below.

6.6 There are two other identified sources of employment land, which are recognised by the Council (and are acceptable as land sources under relevant Welsh planning guidance and Employment Land Review guidance), in Wrexham. All have the potential to deliver new employment uses on sites of greater than 0.25 ha (the minimum size of interest to this study, as defined by Employment Land Review Guidance). These sites are discussed individually in Table 53, but include:

- 67.03 ha (in seven sites) of land within Wrexham Industrial Estate, not allocated in the UDP, but within the employment area boundary and considered suitable for B1/B2/B8 development. Such land is identified either by the presence of planning consents for B-Class employment uses on the land or the site's obvious availability as a development opportunity within the Wrexham Industrial Estate. This includes some 26.00 ha of land at the Former Firestone Site, now identified for a new prison
- 34.16 ha (in seven sites) of land within the other Employment Areas of Wrexham, not allocated in the UDP, but within established employment areas and considered suitable for B1/B2/B8 development. Again such land is identified either by the presence of planning consents for B-Class employment uses on the land or the site's obvious availability as a development opportunity within a recognised local industrial estate or business park.

6.7 Combining these sources gives a total baseline supply for Wrexham of **204.91 ha** as of 31st March 2014.

Flintshire Land Supply Baseline

6.8 The starting point for the supply side assessment is the Flintshire UDP, which allocates 26 sites for future employment development under Policy EM1 and a further four 'High Quality Site Allocations' under Policy EM2. Tables 51 and 52 detail these employment land allocations.

Table 51 – Policy EM1 General Employment Land Allocations

Site Ref.	Site	Settlement	Original Area (ha)	Residual Area at March 2014 (ha)
EM1.1	Chester Aerospace Park	Broughton	15.5	9.0
EM1.2	Manor Lane/Hawarden Park Extension	Broughton	18.2	18.2
EM1.3	Mount Pleasant Road (north)	Buckley	2.0	2.0
EM1.4	Land North of Buckley Station	Buckley	0.6	0.6
EM1.5	Drury New Road	Buckley	1.4	1.4
EM1.6	Chester West Employment Park	Chester	1.3	Developed/ unavailable
EM1.7	Former Power Station	Connah's Quay	12.8	12.8
EM1.8	Crumps Yard, Dock Road	Connah's Quay	4.0	3.45
EM1.9	Deeside Industrial Park, Phase II	Deeside	11.6	Developed/ unavailable
EM1.10	Land to North of Shotton Paper	Deeside	24.0	24.0
EM1.11	Land to East of Shotton Paper	Deeside	32.0	32.0
EM1.12	Land to North West of Garden City	Deeside	98.0	98.0
EM1.13	Greenfield Business Park, Phase I	Greenfield	1.3	1.3
EM1.14	Greenfield Business Park, Phase II	Greenfield	6.1	1.2
EM1.15	Greenfield Business Park, Phase III	Greenfield	6.4	4.4
EM1.16	Greenfield Business Park (III) Extension	Greenfield	6.6	6.6
EM1.17	Broncoed Ind. Est.	Mold	1.1	0.7
EM1.18	Mold Business Park	Mold	5.3	5.3

Site Ref.	Site	Settlement	Original Area (ha)	Residual Area at March 2014 (ha)
EM1.19	Adjacent Mostyn Docks	Mostyn	4.5	3.0
EM1.20	Expressway Business Park	Queensferry	0.7	Developed/ unavailable
EM1.21	Chester Road East	Queensferry	3.8	3.5
EM1.22	Antelope Ind. Est.	Rhydymwyn	1.1	1.1
EM1.23	River Lane	Saltney	2.2	1.1
EM1.24	Land East of Saltney Ferry Road	Saltney	14.6	14.6
EM1.25	Prince William Avenue	Sandycroft	1.8	1.8
EM1.26	Rowley's Drive	Shotton	1.8	0.7
	Total		**278.7**	**246.75**

Source: Flintshire County Council, 2011

Table 52 – High Quality Employment Land Allocations

Site Ref.	Site	Settlement	Original Area (ha)	Residual Area at March 2014 (ha)
EM1.1	Warren Hall	Broughton	36.5	36.5
EM1.2	DARA site	Sealand	18.5	18.5
EM1.3	St David's Park	Ewloe	2.2	0.8
EM1.4	Mold Business Park Extension	Mold	5.0	5.0
	Total		**62.2**	**60.8**

Source: Flintshire County Council, 2011

6.9 The thirty sites originally totalled 340.90 ha. However, development over the 2011-2014 period (which included the complete take-up of three allocated sites – EM1.6: Chester West Employment Park; EM1.9: Deeside Industrial Park, Phase II; and EM1.20: Expressway Business Park) has reduced that supply to 307.55 ha.

6.10 The Council also provided a list of 22 unimplemented planning consents for B1/B2/B8 employment (on sites greater than 0.25 ha), identified through monitoring. However an assessment of the sites included in this schedule indicates that 14 of the permissions have been completed, are under construction, are duplications or relate to land within the allocated employment sites above. The eight remaining relevant consents, which total some 18.58 ha, are discussed further below.

6.11 Combining these two land supply sources (UDP applications and relevant unimplemented planning consents) gives Flintshire a total baseline land supply of **326.13 ha** as of 31st March 2014. The total baseline land supply across the Wrexham and Flintshire study area is **531.04 ha.**

Employment Land Supply Summary

6.12 Tables 53 and 54 set out Wrexham and Flintshire's 2014 supply, outlining the size and location of each site, providing comments on its current status (e.g. owner intentions) and assessing when it might come forward for development or use. The assessment of timescale is based upon a number of factors – ownership situation, planning status, known or likely constraints, infrastructure and services required, market demand.

6.13 As noted above the land supply for each local authority area comprises remaining allocated employment sites, some of which have permission, sites with permission not allocated and others, which either have expired permissions for employment use (where they are still considered suitable) or other land considered suitable within existing industrial estates. Site Proformas, discussing each site in more detail are provided at Appendix 4 (Wrexham) and Appendix 5 (Flintshire).

Table 53 – Employment Land Supply – Wrexham

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
Wrexham Industrial Estate – Sites Allocated under UDP Policy E1				
E1.2	Abenbury Way	1.70	Welsh Government own Owner currently seeking outline planning permission (App. Ref. P/2014/0195) for a 4,650 sqm B2 industrial unit, service yard, access and car park on 1.20 ha of land. Land to the north and west will be retained for ecological mitigation including ponds, grassland, trees, stream and Great Crested Newt Underpass. Likely that unit will be used for the expansion of a local business (Cytec) However, continues to be marketed through Legat Owen, for sale, as a development site. Quoting price is £120,000/ha *Constraints:* • Various ecological issues including ponds (with Great Crested Newt Habitats), grassland habitats, bats, reptiles, birds and badgers • Trees onsite • Watercourses cross the edge of the site. B2	1-3 Serviced
E1.4	Ash Road South (ii)	7.30	Village Bakery Group own Recently acquired by The Village Bakery Group for further expansion within Wrexham Industrial Estate. The site could accommodate a building of some 18,600 sqm. *Constraints:* • Ponds on site (with Great Crested Newt Habitats) • Woodland in the south (forms part of a wider Ancient Woodland area) • Wildlife site to the west (Erlas Black Wood) which overlaps around Ash Road South • Badgers reported onsite • Habitat Directive constraints may make development here difficult. Up to half of the site may be required as ecological mitigation for the Newts, reducing the net developable area to 3.65 ha. Survey work underway here (and on other relevant sites in Wrexham Industrial Estate) with NRW funding to establish the full extent of the ecological constraints here	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			B1/B2/B8	
E1.6	Bryn Cottages	3.60	Multiple Owners (primarily Prysmian Cables and Systems) Previous planning application for a petrol station but no recent proposals put forward. No enquiries recorded by the Council for this site *Constraints:* • Trees onsite • Irregular 'L-shaped' site • Housing adjacent. • Grizzled Skipper Butterfly recorded on site Suggested by Council ecologists as a possible ecological refuge/mitigation site B1/B2/B8	5+ Not serviced
E1.7	Bryn Road	3.65 (Originally 9.5, 3.25 developed and 2.6 set aside for ecological mitigation)	Wrexham County Borough Council own Full planning permission (App. Ref. P/2007/0694) for a biological treatment facility for Waste Recycling Group on 2.55 ha of land in the southern part of the site (7(b)), with 1.10 ha of land within this area set aside for ecological mitigation, including ponds Within the northern site(a) 2.60 ha is set aside for ecological mitigation area as part of the waste recycling development which lies immediately adjacent in the south. Development not complete at April 2014 base date. B8	0-1 Serviced
E1.8	Clywedog Road North	1.90	First Investments own Owner has aspirations to develop this land for services along with the neighbouring site (Site 9) *Constraints:* • Part broadleaved ancient woodland. Is in key ecological network location. Not possible to develop woodland area, which would make remainder of site difficult to develop • In flood risk area • Watercourses cross the site • Trees onsite. B1/B2/B8	5+ Not Serviced
E1.9	Clywedog	2.20	Hydro Aluminium	1-3

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Road East, Wrexham Industrial Estate		First Investments have approached Hydro Aluminium about the purchase of this site First Investments has aspirations to develop this land for services along with the neighbouring site (Site 8) *Constraints:* • Frontage screened by trees • Bridge Road frontage in use for HGV parking by Hydro Aluminium • Identified by Council Ecologists as an ideal site to form part of the Wrexham Industrial Estate wildlife network. If this option was realised, around 40 percent of the site could be retained for ecological mitigation, reducing the net developable area to 1.32 ha B1/B2/B8	Not Serviced
E1.10	Clywedog Road South (i)	1.21 (Originally 3.3 ha of which 2.09 ha is developed)	Tension Control Bolts/Penina 251 own Planning permission for 2 industrial units (App. Ref. P2008/0329) by Penina 251 on the northern part of the site (1.21 ha) has now lapsed. Southern section has permission for two industrial units of 1,952 sqm and 3,800 sqm (P/2011/0131 and P/2012/0771) by Tension Control Bolts on 1.43 ha. Land in the west to be retained for ecological mitigation, including provision of a pond. Southern section now developed and occupied, at least in part, by Tension Control Bolts. Ecological issues mitigated through Tension Control Bolts scheme. B2	1-3 Serviced (in part)
E1.11	Clywedog Road South (ii)	a) 0.48 b) 0.48 c) 1 1.96 total (5 ha originally, 3.04ha developed).	*Ownership:* • Northern site (Site (a)):Lock Stock Self Storage • Central site (Site (b)): Lloyd and Jones Engineering Ltd • Southern site (Site (c)): First Investments a) Full planning permission for storage containers (App. Ref. P/2008/0999) by Lock Stock Self Storage has lapsed b) Outline planning permission for five units (App. Ref. P/2009/0120) by Lloyd and Jones Engineering Ltd. Extension of time to submit reserved matters (App. Ref. P/2014/0138) granted in May 2014 c) Originally formed part of the link road application. Link road now built and this section is no	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			longer required. *Constraints:* • Trees on sites • Watercourse passes along eastern edge of all three sites (to be retained as ecological mitigation). B1/B2/B8	
E1.12	Clywedog Road South (iii)	6.50	First Investments own Owner has aspirations for a development of light industrial units here, reflecting current demand patterns Any proposal would include an ecological management plan *Constraints:* • Irregular, linear shape • Residential buffer zone would also provide ecological mitigation. Size reflects the minimum developable area when a buffer to the adjoining residential area (Pentre Maelor) is applied. Actual developable area likely to be larger B1/B2	1-3 Not Serviced
E1.13	Coed Aben Road	0.17 (2.6ha originally, 2.43ha developed)	First Investments own Marketed as a design and build opportunity, capable of providing a unit of 929 sqm or more. Previous application (App. Ref. P/2013/0810) for the erection of 627 sqm industrial unit, by First Investments, was withdrawn. *Constraints:* • Trees onsite. B1/B2/B8	1-3 Not Serviced
E1.14	Dunster Road,	0.80 (1.5ha originally, 0.6 ha developed)	Lloyds Animal Foods Western Own Full planning permission (App. Ref. P/2012/0204) for a biomass gasification CHP plant on 0.22 ha of land in the south of the site. CHP plant not started yet Land in the north also partly in use as parking for Lloyds Animal Foods and will generally be held to meet the expansion needs of this company only.	3-5 Not serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			Constraints: • Land in the north of the site may be undevelopable due to ecological constraints. B8	
E1.15	Former Tetra Pak	2.90	Mainetti own Mainetti seeking to dispose of this site Mainetti and the Council have so far received four (confidential) enquiries for this land *Constraints:* • Trees onsite • Various footpaths cross the site • Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this land retained as an ecological mitigation site B1/B2/B8	5+ Not Serviced
E1.17	Redwither (ii)	0.90	Isringhausen own Could be linked to Site 19 via a strip of undeveloped land along the Bridge Road North frontage Isringhausen seeking to dispose of this site and Site 19 Interest from Proserve Industrial Limited *Constraints:* • Trees onsite • Footpaths cross the site. B1/B2/B8	1-3 Not Serviced
E1.19	Redwither (iv)	0.90	Isringhausen own Could be linked to Site 17 via a strip of undeveloped land along the Bridge Road North frontage Isringhausen seeking to dispose of this site and Site 17 Interest from R. C. Motors for land here. Negotiations underway for the sale of 0.8 ha. *Constraints:* • Trees onsite • Includes semi improved grassland.	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			Potentially up to half the land (0.45 ha) could be set aside as a wildlife corridor. B1/B2/B8	
E1. 20	Redwither (v),	a) 2.03 b) 0.82 Total 2.85 ha (3.3ha originally, 0.45ha developed)	*Ownership:* • Northern Site (Site (a)): European Sheeting • Southern Site (Site (b)): Erlas Developments. b) Full planning permission for 12 B1 office units (P/2007/0433 & P/2008/1034) totalling 430 sqm (30-50 sqm each), plus pond and wet grassland to the east by Erlas Developments. Development underway – area to south west has been developed, with remainder not yet started. *Constraints:* a) Bounded by Great Crested Newt exclusion fencing, ecological mitigation area on the northern boundary, trees onsite b) Constraints addressed by the development. B1/B2/B8	1-3 Serviced
E1. 21	Ridley Wood Road,	3.30	Welsh Government own Welsh Government holding the land for the expansion of Cytec and has (or will shortly be) taking it off the market Previously marketed, for sale, as a strategic employment site. Quoting price was £180,000/ha The Council has also received a (confidential) enquiry for this land *Constraints:* • Trees onsite • Watercourses cross the edges of the site. B2	3-5 Not Serviced
Sub Total		***41.84***		
Wrexham Industrial Estate – UDP Policy E3 Single User Site				
E3	UDP Single User Site	32.20	Kingmoor Park Properties own Northern Section (Site (a)): Has outline permission for a 46,950 sqm B8 storage and distribution unit on 20.61 ha, to be used by Norbert Dentressangle Logistics, (App. Ref. P/2011/0891) secured at appeal (Appeal Ref. APP/H6955/A/09/2188910) in August 2013	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			Southern Section (Site (a)): Has outline permission for a 37,160 sqm B2/B8 development (comprising 22,159 sqm of B2/B8 space and 2,144 sqm of B1 offices) (App. Ref. P/2008/0993), with the time to submit reserved matters extended by application P/2013/0270, secured at appeal (Appeal Ref. APP/H6955/A/09/2113258) in May 2010. Site is also being considered as a National Strategic Infrastructure Project - submitted by Wrexham Power Limited (Glenfinnan and St. Modwen) as a site for the Wrexham Energy Centre, a new combined cycle gas turbine (CCGT) power station and its integral gas connection. *Constraints:* • Trees onsite, with a dense block of woodland located east-west through the site • Ponds and other watercourses • Great Crested Newt Breeding Ponds • Habitats for a range of protected species • Close to various houses and farms. These various ecological issues, to be dealt with through the agreed mitigation strategy B2/B8	
Sub Total		***32.20***		
Wrexham Industrial Estate – Other Development Land within the Employment Area Boundary				
Site A	Abenbury Way (ii), JCB Expansion Land	6.00	JCB own Expansion land for JCB who presently occupy 55 percent of their total site Located to the rear of JCB and could only be accessed through land under their ownership, thus not readily available to meet the needs of other businesses JCB has announced plans to invest £150 million to expand its operations in Staffordshire and create an additional 2,500 jobs by 2018. The projected growth in machine production from Staffordshire factories will be supported by an increase in manufacture of components from factories elsewhere in the UK, including axles and gearboxes from the Wrexham plant. In time, this may necessitate an expansion of JCB facilities at Wrexham Industrial Estate. B2	5+ Not Serviced
Site B	Cefn Park, Redwither	11.50	Cefn Park Estates own Previous outline permission for industrial uses (App. Ref. P/2000/0019) has now expired.	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Road		*Constraints:* • Part of a wider wildlife site, extending south to the River Clywedog, and is now considered undevelopable due to multiple ecological constraints • Pylons cross the site • Trees onsite • Various footpaths cross the site • Remains of multiple small buildings on the site. Assumed to be undevelopable. B1/B2/B8	
Site C	Coed Aben Road (ii & iii)	1.70	First Investments and Guy Tyrell own On the market, for sale, as development or storage plots of 0.40 ha or more. Includes an area of hardstanding *Constraints:* • Trees onsite • Small pond and wet area to the rear • Grizzled Skipper Butterflies and Great Crested Newt recorded on site Council Ecologist view is that the central area of the site (some 0.55 ha) should be retained, for ecology, leaving the north and south of the site (1.15 ha) available for development. B1/B2/B8	1-3 Not Serviced
Site F	Redwither Road(ii)	0.74	I C Properties own Forms part of a wider ownership which extends to include the unit to the north, which is occupied by Nutrafeed (as their headquarters) Likely to be held for the future expansion of that business *Constraints:* • Watercourse crosses the site (forms part of a wildlife corridor) • Flood risk area • Trees onsite. B1/B2/B8	5+ Not Serviced
Site G	Site G	0.99	Private individual owns	5+

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Redwither Road(i)		Expansion land for the adjacent multi-let industrial complex (Redwither Works). However, land could not be developed without the loss of much of the established woodland and the likely interference with the wildlife corridor. *Constraints:* • Forms part of a wildlife corridor • Significant tree coverage on site. B1/B2/B8	Not Serviced
Site Hi	Bridge Road (Firestone Site)	26.00	Welsh Government own 26.1 ha has outline planning permission for a 76,370 sqm prison (App. Ref. P/2013/0671), with a secure perimeter fence, access, parking, visitor/support building, energy centre and associated landscaping. Initial site preparation and ecological mitigation activities (including the erection of Great Crested Newt fencing) are underway, overseen by Natural Resources Wales Construction works are expected to begin in Summer 2014 The Prison will be fully operational be September 2017 Site will be developed for a 2,100 place prison, holding Category C adult male prisoners Ecological issues including a number of protected species (ecological mitigation to be focused on Site Hii). Prison (C2A)	0-1 Not Serviced
Site Hii	Bridge Road (Firestone Site)	20.10	Welsh Government own 26.1 ha (primarily in Site Hi) has outline planning permission for a 76,370 sqm prison (App. Ref. P/2013/0671), with a secure perimeter fence, access, parking, visitor/support building, energy centre and associated landscaping. The bulk of Site Hii will be protected for ecological mitigation. Initial site preparation and ecological mitigation activities (including the erection of Great Crested Newt fencing) are underway for the prison, overseen by Natural Resources Wales Adjacent owner F Lloyd Penley has a requirement for some 2.4 ha of expansion land in the west of the site to accommodate a new 14,864 sqm logistics unit. This would be integrated into their existing site, with access coming from within that site. It is understood that the company would either acquire 2.4 ha and pay a commuted sum for an 'off site' mitigated area, or the company will purchase 4.8 ha, taking responsibility for a mitigated area within its own	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			site boundaries. *Constraints:* • A number of protected species recorded onsite • Ponds onsite (including Great Crested Newt Habitats) • Gas main crosses south of site • Watercourses cross the site • Environmental corridor associated with the Clywedog River to the south. Prison (C2A)	
Sub Total		***67.03***		
***Land Elsewhere in Wrexham* — Sites Allocated under UDP Policy E1**				
E1. 22	Wynnstay Industrial Estate, Acrefair	1.40	NS Holdings own Previously proposed for housing, but a planning application was refused and dismissed at appeal. Remaining development plot at Wynnstay Technology Park (Plot 1) No known developer/occupier interest at this time *Constraints:* • Trees onsite. B1/B2/B8	5+ Not Serviced
E1. 23	Gresford Industrial Estate, Pandy	1.10	IMW and M Jones own Outline application (P/2009/0732) for three B1 business units on 0.92 ha has now expired. Not clear if owners have any intention to develop this site following lapsing of previous permission. *Constraints:* • Site surrounds an electricity substation • Much of site is wooded • Housing adjacent. B1/B2/B8	5+ Not Serviced
E1. 24	Vauxhall	0.71 (2.5	*Ownerships:*	5+

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Industrial Estate, Johnstown	originally, 1,79 ha developed or constrained)	• Northern Site (Site (a)): Vale of Llangollen Travel • Central Site (Site (b)): Flint Group • Southern Site (Site (c)): Multiple private individuals a) In active use for coach parking by Vale of Llangollen Travel b) Unused c) Most of site is in use for open storage by Flint Group. Full planning permission (App. No. P/2012/0428) for the erection of a 119 sqm steel framed storage shed on 0.10 ha, for the use of the adjacent occupier (Flint Group). Remains undeveloped. *Constraints:* b) Trees onsite c) Site of ecological value (Monks Pool) to the south Stryt Las A'r Hafod Site of Special Scientific Interest to the east, further ecological surveys would be required prior to any development Sites a and c are backland sites which cannot be independently accessed from the industrial estate roads. B1/B2/B8	Not Serviced
E1. 25	Llay Industrial Estate	3.30	North Wales Police own This site (and Site 26) was purchased from Sharp in late 2013 North Wales Police intend to build a new custody suite and offices here, relocating most of their facilities from the current building in Wrexham Town Centre Subject to planning, this new facility will form a new divisional HQ serving Wrexham and Flintshire Detailed timetable for the development has not been established. *Constraints:* • Sloping • Trees onsite • Ponds in this area (will need surveying for Great Crested Newts) • An (as yet undetermined) portion of land will need to be retained for ecological mitigation. Custody centre (C2A)	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
E1.26	Llay Industrial Estate	2.90	North Wales Police own This site (and Site 25) was purchased from Sharp in late 2013 North Wales Police intend to build a new custody suite and offices here, relocating most of their facilities from the current building in Wrexham Town Centre Subject to planning, this new facility will form a new divisional HQ serving Wrexham and Flintshire Detailed timetable for the development has not been established *Constraints:* • Sloping • Trees onsite • Ponds in this area (will need surveying for Great Crested Newts) • An (as yet undetermined) portion of land will need to be retained for ecological mitigation. Custody centre (C2A)	1-3 Not Serviced
E1. 28	Llay Industrial Estate	1.40	Owner not known (Land Registry records not available) *Constraints:* • Landlocked site with unclear ownership, may not be developable • Trees onsite • Ponds in this area (will need surveying for Great Crested Newts) • An (as yet undetermined) portion of land will need to be retained for ecological mitigation • Land is bounded by existing businesses in the south and Sharp's landholdings in the north, providing a separate access would be difficult. B1/B2/B8	5+ Not Serviced
E1. 29	Llay Industrial Estate	1.20	Poole Bay Construction Company own Held as a long term asset by a national construction firm *Constraints:* • No plans for development here at present • Trees onsite	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			• Various footpaths cross the site. B1/B2/B8	
E1. 30	Llay Industrial Estate	0.47 (Originally 0.8, 0.33 has been partially developed)	D & D James own Full planning permission (App. Ref. P/2007/1150) for a steel framed industrial unit Most of site is in active use by D & D James Steel Buildings (who have a developed unit on the site) for premises and car parking. I&S Car Centre also operates from an adjoining unit. The unfinished steel frame unit is used for open storage and as a 'demonstration facility' to illustrate D & D James' building techniques Not clear if it will ever be fully completed B1/B2/B8	5+ Not Serviced
E1.31	Llay Industrial Estate	6.40 (7.50 originally – 1.10 ha developed)	Multiple owners including Wrexham County Borough Council, Marlin Industries and several private individuals (Primarily) greenfield expansion land for Llay Industrial Estate North eastern portion of site is in use for open storage by Marlin Industries Remainder is in active agricultural use No identified plans for development on this site *Constraints:* • Trees onsite • Multiple ownerships • Backland site, any access to Llay Industrial Estate would have to pass through the ownerships of existing businesses • Great Crested Newts possibly present on edge of site Access constraints and multiple ownerships would make it difficult to deliver a single coherent development here. B1/B2/B8	5+ Not Serviced
E1.32	Coppi Industrial Estate, Rhos	0.40 (0.81 originally, 0.41 seems to be in use)	*Ownerships:* • Northern Site (Site (a)): Not known, Land Registry Data not available • Southern Site (Site (b)): Private individual a) Full planning permission for the parking of private hire vehicles. This does not appear to	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			have been taken up. North west portion of the site has been developed for two terraced industrial units. No evidence of activity on the rest of the site b) In use for open storage by an unidentified business *Constraints:* b) Trees onsite B1/B2/B8	
E1. 35	Pandy Industrial Estate, Pandy	0.70 (Originally 1.10, 0.40 developed)	Lloyd Morris Holdings own Full Planning Permission for 2 industrial units totalling 855 sqm (App Ref. P/2010/0908) on 0.085 ha Growth land for Pandy Industrial Estate *Constraints:* • Trees onsite. B1/B2/B8	3-5 Not Serviced
E1.37	Rhosddu Industrial Estate, Wrexham town	0.90 (1.70 originally, 0.80 developed)	Toolpak own Expansion land for Toolpak Some land in the south is in use for open storage by that company Is presently within the secure curtilage of Toolpak but could be developed separately with a distinct access provided from the main industrial estate road *Constraints:* • Trees onsite • Railway line adjacent. B1/B2/B8	5+ Not Serviced
E1. 39	Ruthin Road Development Area (Western Gateway), Wrexham town	8.80 (originally 15.20, but reduced to 8.80 as a result of planning permission)	Wrexham County Borough Council own Received outline planning consent for a mixed use development (App. Ref. P/2003/1285) comprising - a high quality employment park, housing, primary school, open space and infrastructure. Various subsequent applications of which the latest (App. Ref. P/2012/0059) extends the period stipulated for submission of a reserved matters application for a further five years (to 2017) Application P/2012/0059 clarifies the total site area to be 23.62 ha, of which 8.83 ha is	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			designated as employment development land and 6.42 ha is proposed for housing. A further 8.13 ha will be set aside for ecological mitigation, providing a new wildlife and recreation corridor with links to Wrexham Town Centre Various infrastructure changes are proposed including realignments and a new roundabout for the A525 (towards its junction with the A483) and associated access and spine roads Additional footpaths/cycleways to be provided, linking Wrexham Technology Park and the Hospital Wrexham Gateway will form a third phase of Wrexham Technology Park Croesnewydd Road Highway Improvement Scheme completed in spring 2013 A proposed development of 4.05 ha has effectively now been secured on the employment land and is the subject of submitted planning applications for both the required access road and the development which will provide 8,166 sqm of new Grade A accommodation for a single end user. This will be completed and occupied by Spring 2016. Following the development identified above only 4.75 ha of developable employment land will remain. However, this cannot currently be developed until major improvements are made to the adjoining A483 junction. Demand exists for the remaining employment land and WCBC Economic Development officers have recorded three strong enquiries for land here over 2014. Each was seeking to carry out their own developments respectively for 600, 1,000 and 1,500 sqm of accommodation. The Council will proceed with development of the spine road through the site and other associated infrastructure works. *Constraints:* • Trees onsite • Various public footpaths pass through the site • River Gwenfro pass through the site • Various ecological issues, to be addressed through the provision of ecological mitigation land. B1	
Sub Total		***29.68***		

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
Land Elsewhere in Wrexham – Other Development Land				
Site K	Llay Industrial Estate (H)	0.80	P. R. Pugh Haulage own Site in active use for lorry parking by P. R. Pugh Haulage Contractors No plans for development here B1/B2/B8	5+ Not Serviced
Site L	Former Brymbo Steelworks	8.00	Emror (formerly Brymbo Developments) Developments own Historic outline consent (App. Ref. CB00016 granted in November 1997) for a mixed use scheme, for retail, B Class employment and leisure uses. Further consents for B1 light industrial units (App. Ref. P/2005/1484) and commercial development (P/2005/1489). Four extensions to the period within which reserved matters applications can be submitted (2000, 2003, 2006 and 2009) where then sought. The most recent consent, granted in March 2014 (App. Ref. P/2014/0166) was reserved matters approval for a spine road to access the site and to further extend the time in which reserved matters consent can be sought to March 2017. Housing development in the south now complete. Outstanding development includes 8 ha of B-Class employment and a 1.5 ha primary school. Access in place Although the owner has retained a long term commitment to this site, they have also continued to defer the B1/B2/B8 development in favour of residential options. Not clear if this aspect of the development will ever be delivered by the current owners. Reclaimed site *Constraints:* • Plateau site, with steeply sloping sites. B1/B2/B8	5+ Not Serviced
Site M	Ruabon Business Park, Adjacent A483	23.00	Wynnstay Farming Company Ltd own Reserved matters planning permission (App. Ref. P/2003/1484) for a 49,749 sqm B1 Business Park – High Technology, Manufacturing, Research and Development of Prestige Offices Also has a Certificate of Lawful Development (App. Ref. P/2010/0847) for the provision of a site access road, associated with the above reserved matters consent, secured at appeal (Appeal Ref. APP/H6955/X/11/2160288) in June 2012 Owner now seeking outline consent (App. Ref. P/2014/0021) for a mixed-use development	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			comprising: • 300 houses – including 16 social rented and 14 intermediate homes • 1,858 sqm of A1food retail and a Petrol Filling Station • 12, 960 sqm of B1(c) light industrial • 4,646 sqm of B8 storage and distribution • A 2,787 sqm 2/3 storey hotel and pub/restaurant • 6.08 ha of public open space, retaining an existing pond Also 0.73 ha land reserved for a primary school and access off the A539 and B5605. Further potential for a 0.61 ha Extra Care facility. Total B-Class employment delivered by this application would be 17,606 sqm on 3.42 ha. Current proposal will only provide a third as much B-Class employment as the previous consented outline proposal *Constraints:* • Various ecology issues – including breeding birds • Footpaths cross the site • Woodland onsite • Pond in centre of site (to be retained in current proposal). B1/B2/B8	
Site N	Buildings 5&6, Plas Power Colliery, Southsea	0.31	Read Construction Holdings own Planning permission (App. Ref. P/2007/0931) for the change of use of buildings and land to office use including link building extension and associated works has now lapsed *Constraints:* • Any future development will need to retain the existing listed buildings on site • Vacant buildings on site benefit from listed building status and curtilage listed status • Potential of contamination requiring ground investigation • Trees on site. B1/B2/B8	5+ Not Serviced
Site O	Westminster Industrial	0.82	Whitley Brothers own Planning permission for ready mixed concrete plant (App. Ref. P/2008/0103) by D P Williams	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Estate, Gwersyllt		Holdings has now lapsed. Hardstanding area with previous permissions for concrete batching plants and the manufacture of concrete products by D P Williams Holdings. Land likely to be held to meet the needs of this company only Being considered as a potential UCS housing site for inclusion in the LDP. B1/B2/B8	
Site P	Land at Minera Building Supplies, Five Crosses Industrial Estate, Minera	0.28	Minera Building Supplies Ltd own Full planning permission (App. Ref. P/2011/0339) for three multi-let buildings of B1/B2/B8 employment use Proposed for three buildings containing 11 two-storey Class B1/B2/B8 office and workshop units with associated access, parking and landscaping B1/B2/B8	1-3 Not Serviced
Site Q	North of Tomlinson's Dairies, Pen y Palamant Farm, Minera	0.95	Tomlinson's Dairies own Full planning permission (App. Ref. P/2012/0112) for the construction of a building for bottling and storage of milk. Proposed for a 643 sqm bottle store for the use of the dairy with an area of hardstanding and earthworks on the remainder of the 0.9 ha site. Greenfield land to the north is also owned by Tomlinson's Dairies and will generally be held to meet the expansion needs of this company only. Ecological issues mitigated through consented application B8	1-3 Not Serviced
Sub Total		**34.16**		
Total		**204.91**		

Source: BE Group and Wrexham County Borough Council; 2014

Table 54 – Employment Land Supply – Flintshire

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
EM1.1	Chester Aerospace Park, Broughton	9.00	Welsh Government/Pochin own Planning consent for up to 42,000 sqm of B1/B2/B8 accommodation. A portion of the site is now being developed for a 2,500 sqm industrial facility for SIRA Test and Certification. Land is being developed through a partnership between UK Land and Property, Pochin in conjunction with Welsh Government. Development should be complete by late 2014. Identified by Airbus as a preferred site for provision of a supplier park. The masterplan development can accommodate individual buildings of up to 23,223 sqm. Site divided into six development plots of which three remain available. These range from 1,858 sqm up to 13,935 sqm. Pochin report that they have a number of parties potentially interested in these plots. *Constraints:* • Airbus runway and related facilities adjacent. Development will require consultation with Airbus. B1/B2/B8	1-3 Serviced
EM1.2	Manor Lane/Hawarden Park Extension, Broughton	18.20	Welsh Government/Gladstone Estates own Outline consent for extension to existing business park for employment purposes (App. Ref. 050673) providing a 7,800 sqm office park (Class B1) on the western site and 22,100 sqm of B2/B8 development on the eastern site served by two separate access points. Identified by Airbus as a preferred site for provision of a supplier park. Marketed as expansion site for Hawarden Business Park. *Constraints:* • Site is bisected by Broughton Brook creating a natural division between the eastern and western parts. • Flight path limitations for Hawarden Airport serve to render the easternmost parts of the site undevelopable. • Possible habitat issues on Chester Road frontage.	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			• Potential constraints on electricity supply. B1/B2/B8	
EM1.3	Mount Pleasant Road (north), Buckley	2.00	Blackrock Development Ltd own Full planning consent for warehouse and manufacturing units (App. Ref. 48990 and 049270) North western part of site developed as premises for Lester Fabrication & Cladding Co. (App. Ref. 049138) North eastern part of the site developed as premises for William Taylor Stonemasons (App. Ref. 048989) Southern part of site under construction (may now be complete) for two industrial units totalling 916 sqm (App. Ref. 48990 and 049270). Southern units are on the market for sale at £710/sqm. B1/B2/B8	0-1 Serviced
EM1.4	Land North of Buckley Station, Buckley	0.60	Buckley Foods own Held as expansion land for Buckley Foods *Constraints:* • Adjacent to railway line • Bounded by trees B1/B2/B8	5+ Not Serviced
EM1.5	Drury New Road, Buckley	1.40	F.G. Whitley & Sons Co own Expansion land associated with the 4,236 sqm manufacturing unit to the south (former Optec/Airbus facility). Both the unit and the land have now been let to Glen Dimplex Professional Appliances, for the supply of refrigeration units for hospitals, pharmacies and laboratories amongst others. It is possible that Glen Dimplex will wish to develop the additional land for further facilities. Both sites share common access arrangements at present, but could be divided to provide separate development opportunities *Constraints:*	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			• Trees onsite B2	
EM1.7	Former Power Station, Connah's Quay	12.80	E.ON UK, FCC & Network Rail own Proposed as a waste transfer station however, planning permission for this was refused. Land is to the rear of the existing power station facilities bounded by the River Dee to the north and railway line to the south. Cannot be developed separately from the power station and is assumed will be retained for associated uses. *Constraints:* • In flood risk area • Remains of various cleared buildings and roadways on the site. • Electricity pylons cross edge of site • Railway line adjacent B1/B2/B8	5+ Not Serviced
EM1.8	Crumps Yard, Dock Road, Connah's Quay	3.45	Flintshire County Council own Confidential proposal on site Former rail marshalling yard Land has been reclaimed Previous interest from Connah's Quay Watermen for heritage facility *Constraints:* • Access via low bridge • Remains of buildings on site • Trees onsite B1/B2/B8	1-3 Not Serviced
EM1.10	Land to North of Shotton Paper, Deeside	24.00	UPM Shotton own Previously proposed for laboratory facilities Held as expansion land for UPM Shotton Within Deeside Enterprise Zone *Constraints:*	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			• Pond on site B1/B2/B8	
EM1.11	Land East of Shotton Paper, Deeside	32.00	Flintshire County Council own Northern site identified for a Deeside Energy Recovery Facility (energy from waste) and has permission for an Energy Recovery Facility (App. Ref. 50340) Southern site developed for convertor station comprising valve halls, a control building and a spares building together with outdoor electrical equipment and associated access improvements, infrastructure, earthworks, security fencing, landscaped areas and habitat creation (App. Ref.: 050340) B2	1-3 South – Serviced North – Not Serviced
EM1.12	Land to North West of Garden City, Deeside	98.00	Pochin/Praxis own Outline permission for a mixed use development (App. Ref. 050125) Proposed for : • Industrial and Logistics Park (B2, B8) – approximately 120,000 sqm • Residential - 600 dwellings (or more) • Offices (B1a) – approximately 3,300 sqm • Light Industrial (B1c) – approximately 7,400 sqm • Hotel (C1) – approximately 3,000 sqm • Skills and Training Centre (C2, D1) – approximately 4,000 sqm • Local Retail Centre (A1) – approximately 2,500 sqm • Green infrastructure, including approximately 21.9 ha parkland and landscaping/buffer and drainage areas • Main vehicular access from Welsh Road and a secondary access for the residential area from Farm Road. Site divided by Pochin development land in the south and west and Praxis development land in the north and east. ***Pochin development*** Phase 1 – to begin over 2014/15 (development of 50 dwellings plus estate roads, landscaping and flood prevention works). Phase 1A-1D – to be completed over the next ten years (50 dwellings/year and 25,000 sqm of employment).	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			Phase 2 – completion of employment and local centre development over five years from the end of Phase 1. ***Praxis development*** Phase 1 - to begin over 2014/15 (development of 50 dwellings, completion of link road, provision of employment site D, flood prevention works). Phase 1A-F – 50 dwellings/year over 12 years from the end of Phase 1. Phase 2 – completion of road link, commercial/retail development and employment development over four years of the end of Phase 1. Flood alleviation and river strengthening work to begin in summer 2014. Masterplan produced Within Deeside Enterprise Zone *Constraints:* • Flood risk area Mixed Use (B1/B2/B8)	
EM1.13	Greenfield Business Park, Phase I, Greenfield	1.30	Flintshire County Council own To the rear of Westbridge Furniture, and likely to be expansion land for this business Greenfield Business Park is a Tier 2 Assisted Area *Constraints:* • Backland with constrained access • Trees onsite • Railway adjacent B1/B2/B8	3-5 Serviced
EM1.14	Greenfield Business Park, Phase II, Greenfield	1.20	Flintshire County Council (and others) Comprises three sites: • The north-easterly site comprises contaminated brownfield land which is available. Limited interest in this site • The central site in use for lorry parking and open storage • The southern site is developed as 'Energi Centre' (training, education, research and development centre) for Kingspan and associated facilities (and is	5+ Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			excluded from the land supply total) Greenfield Business Park is a Tier 2 Assisted Area *Constraints:* • Northern site is contaminated • Some access roads are unadopted • Potential flood risk • Remains of buildings on northern site B1/B2/B8	
EM1.15	Greenfield Business Park, Phase III, Greenfield	4.40	*Ownerships:* • Eastern site – Flintshire County Council • Western site – multiple private individuals Greenfield Business Park is a Tier 2 Assisted Area *Constraints:* • Trees onsite • Eastern site includes remains of buildings • Two sites are divided by a railway line • Amenity site adjacent to eastern area • Flood risk potential to eastern site. B1/B2/B8	3-5 Not Serviced
EM1.16	Greenfield Business Park (III) Extension, Greenfield	6.60	Landcare (Puriton) own Greenfield Business Park is a Tier 2 Assisted Area *Constraints:* • Limited interest in this site • Flood risk area • Marshy/uneven ground • Railway adjacent • Amenity site adjacent. B1/B2/B8	5+ Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
EM1.17	Broncoed Industrial Estate, Mold	0.70	F.G. Whitley & Sons Co own Planning permission for light industrial units (App. Ref.: 042134) Block A, comprising 1,448 sqm of space in four units of 180 sqm and two units of 364 sqm, has been developed on the south of the site. Premises are now being marketed here. Block B, comprising six units of 180 sqm each, was uncompleted but is now under construction B1/B2/B8	0-1 Serviced
EM1.18	Mold Business Park, Mold	5.30	*Ownerships:* • Eastern site – Hansteen • Western site – Part West Coast Energy/Part Flintshire County Council Eastern site has outline permission for a mixed use development (App. Ref: 046878) comprising: • 4,920 sqm of B1/B2/B8 employment use (in 12 units of 200-1,295 sqm in size) • A 2,090 sqm hotel and restaurant • Two further development plots held for B1/B2/B8 employment use Eastern site on the market with outline planning permission 1.40 ha in western site developed as premises for Atmos Consulting (reduces site size to 3.90 ha) *Constraints:* • Trees onsite • Stream passes through eastern site • Various other watercourses pass through both sites. B1/B2/B8	1-3 Not Serviced
EM1.19	Adjacent Mostyn Docks, Mostyn	3.00	Warwick International own Warwick International is currently seeking full planning permission (Minerals Application Ref. 051924) for a 3,830 sqm combined heat and power plant on 1.32 ha of land in the north of the site. The plant would provide steam and electricity for use by the adjacent Warwick International chemicals plant and for export to the National Grid. The plant would be fuelled by waste wood delivered to the site by HGV. If planning consent is obtained, it is anticipated that construction will commence in	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			August/September 2014 and be complete by the end of 2015. *Constraints:* • In a floodrisk area • Existing buildings and car park onsite • Trees onsite • Ecological issues along River Dee shore. B2	
EM1.21	Chester Road East, Queensferry	3.50	Stretton Estates own On the market for motor trade, leisure, office and industrial uses Plots available from 0.40 ha Quoted price is £371,000/ha Also offered for design and build options of 465-14,000 sqm *Constraints:* • Adjacent to railway line B1/B2/B8	1-3 Not Serviced
EM1. 22	Antelope Industrial Estate, Rhydymwyn	1.10	F.G. Whitley & Sons Co own Held to meet the expansion needs of existing businesses within Antelope Industrial Estate However, F.G. Whitley & Sons would also be willing to make the site available to an incoming business as a design and build option *Constraints:* • Ecological issues B1/B2/B8	5+ Serviced
EM1. 23	River Lane, Saltney	1.10	Brymau Estates own the western site Eastern site developed as Riverside Trade Park comprising six units (and excluded from the land supply total) Western site remains undeveloped, partly in use for open storage *Constraints:* • Constrained access to River Lane	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			• Flood risk B1/B2/B8	
EM1. 24	Land East of Saltney Ferry Road, Saltney	14.60	Hawarden Estate own Has outline planning permission for B1/B2/B8 uses (various consents) For sale as a freehold development site with consent for B Class employment Marketed as Ferry Point Various proposals to provide improved access to Saltney Ferry Road including extension to River Lane and additional bridge across the River Dee *Constraints:* • Flood risk • Poor access to the south • Trees onsite. B1/B2/B8	3-5 Not Serviced
EM1. 25	Prince William Avenue, Sandycroft	1.80	Hollingsworth Bros UK own Full application for six industrial/business buildings with a total floor space of 5,460 sqm under consideration by Flintshire County Council *Constraints:* • Trees onsite. B1/B2/B8	1-3 Not Serviced
EM1. 26	Rowley's Drive, Shotton	0.70	Flintshire County Council own Remaining land for sale for B1/B2/B8 employment uses Most of northern site developed for light industrial units (and excluded from the land supply total) 0.70 ha available in the south and west of Evans Way Quoted price is £375,000/ha Also previously considered as Travelling Showpeople's accommodation *Constraints:* • Trees onsite • Adjacent to railway.	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			B1/B2/B8	
EM2.1	Warren Hall, Broughton	36.50	Welsh Government own Outline consent for B1 Business Park Various reserved matters consent for landscaping and access Welsh Government not actively marketing this site Was originally identified as second Chester Business Park however, is no longer a priority site Seen as secondary priority to development of EM1.12 It is assumed that a degree of public sector input will be required to help bring this site forward. Options for this are considered further below and in Sections 10.0 and 11.0. *Constraints:* • Trees onsite B1	3-5 Not Serviced
EM2.2	DARA Site, Sealand	18.50	Ministry of Defence own Former RAF complex Range of former military buildings on the site; some still occupied by private companies Appears to function (at least in part) as active industrial estate Development land in the north and other development plots/unused premises spread throughout the complex *Constraints:* • Coherent redevelopment here would be difficult • Existing buildings on site; some still in use • Possible contamination from historic uses • Trees onsite B1/B2/B8	5+ Serviced
EM2.3	St David's Park, Ewloe	0.80	Ownership unclear Most of the western and northern area has been developed for large self-contained office units (and excluded from the land supply total) One large plot remains in the east suitable for another large self-contained office	3-5 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			property or scheme of multi-let office suites B1	
EM2.4	Mold Business Park Extension, Mold	5.00	Flintshire County Council own Long term allocation Since 1996 only 1 ha has been developed here Development costs are expected to be high and development for B Class employment uses may not be financially viable Site is now being progressed through the Strategic Housing and Regeneration Programme (SHARP) for social, affordable and rent to buy homes over the next five years. *Constraints:* • Trees onsite • Various watercourses cross the site • Flood risk • Uneven site. B1/B2/B8	5+ Not Serviced
Planning Application 1	Airbus 1, Chester Road, Broughton	1.03	Airbus own Full planning consent for B8 employment use (App. Ref. 050157) Proposed single aisle despatch facility with a total floorspace of 954 sqm, relocation of the car park serving Site 5 (wing assembly and painting facilities) and realigned internal access roads within the Airbus site. B8	1-3 Serviced
Planning Application 2	Airbus 2, Chester Road, Broughton	6.36	Airbus own Full planning consent (App. Ref. 050597) for the construction and operation of the Beluga Line Station (modified proposals from planning permission Ref 051119) equating to 4,781 sqm of B2 Use Class floorspace comprising: • A single building with an attached three-storey office/welfare block • A separate GSE shelter (for the storage of support and equipment used in the Beluga transportation process). Ancillary development includes the provision of a car park, utility infrastructure (including	1-3 Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
			foul and surface water drainage), a HGV turning area, footways and access roads. B2	
Planning Application 3	Corus Colours, Weighbridge Road, Deeside Industrial Park, Deeside	6.23	Tata own Full planning consent for the construction of a Sustainable Building Envelope Centre (App. Ref. 047347), a 1,032 sqm office and research facility for Tata Within Deeside Enterprise Zone B1	1-3 Serviced
Planning Application 4	Site off Aber Road, Flint	0.68	Hollins Murray Group and Huws Gray own Full planning consent for the construction of new builders merchant building with associated yard (App. Ref. 048078) with a gross external floorspace of 1,290 sqm and an associated area of external storage/hardstanding of 3,250 sqm for the occupation of Huws Gray *Constraints:* • Brownfield site is cleared and is currently in a semi-derelict condition • Trees onsite • Swinchiard Brook bounds the site to the east, south east and to the north. Potential risks from the watercourse dealt with as part of the Flood Consequence Assessment of the associated planning consent. B8	0-1 Not Serviced
Planning Application 5	Pany Y Buarth Depot, Pant Y Buarth, Gwernaffield, Mold	0.34	A E Rowlands Plant Hire own Full planning consent (App. Ref. 46847) for the erection of a 106 sqm two storey office extension and workshop alterations/extension of 43 sqm. B1/B2/B8	0-1 Serviced
Planning Application 6	Babbage Road, Engineer	1.70	Class Free own Outline planning consent for seven light industrial units (App. Ref. 46940) each of 1,000 sqm together with associated access, layout and parking for 156 cars.	1-3 Not Serviced

Site Ref.	Name	Size, ha	Comment / Update	Estimated Availability, years
	Park, Sandycroft		Subsequent application to extend period for the submission of reserved matters approved (App. Ref. 050517) *Constraints:* • Trees onsite B1/B2/B8	
Planning Application 7	Bradford Soap Works, Minerva Avenue, Chester West Employment Park, Sealand	0.34	Bell Developments own Full planning consent for the development of three light industrial units with associated parking and (App. Ref. 048296) comprising one workshop unit of 372 sqm and two workshops units of 204 sqm, together with 20 car parking spaces. B1/B2/B8	1-3 Not Serviced
Planning Application 8	Deeside Industrial Park – Zone 1, Deeside	1.90	Brightsea SARL (c/o Reit Asset Management) own Full planning consent (App. Ref. 050123) for the change of use of four plots of vacant land for open storage for miscellaneous use including caravans Site is split across four area extending to 1.9 ha of vacant land Three of the four yards with planning consent for open storage are being marketed. The north-eastern site benefits from planning permission only, but is not being marketed Quoted price for marketed plots is £24,710/ha B1/B2/B8	5+ Not Serviced
Total		**326.13**		

Source: BE Group and Flintshire County Council; 2014

6.14 As noted above, Wrexham has a gross baseline supply of 204.91 ha, of which over two thirds (141.07 ha) is at Wrexham Industrial Estate. However, as Table 55 shows, some 11.92 ha is actually developed or has significant physical constraints. Another 89.30 ha is likely to be held to meet the expansion needs of specific businesses and cannot be considered part of the readily available employment land supply or is proposed for alternative uses. Finally, 23.64 ha comprises land on sites which have identified ecological issues. Those issues may mean that some, or all, of that site is rendered undevelopable and has to be retained for ecological mitigation. Removing all these sites gives a realistic employment land supply of **80.05 ha.**

Table 55 – Wrexham Land Supply Scenarios

Site	Cumulative Total Land Supply, ha	Justification for Site Exclusion from Supply
Baseline	204.91	-
Sites Already Developed or With Constraints		
E1.7: Bryn Road, Wrexham Industrial Estate	-3.65	At April 2014 the site was under development for a Biological Treatment Facility for Waste Recycling Group. Other land set aside for ecological mitigation.
E1.28: Llay Industrial Estate	-1.40	Site is bounded by other ownerships and may be inaccessible.
E1.30: Llay Industrial Estate	-0.47	Site is (effectively) developed to the level required by the owner.
E1.31 Llay Industrial Estate	-6.40	Access constraints and multiple ownerships would make it difficult to deliver a single coherent development here
Reduced Supply Total	***192.99***	**-**
Sites Likely to be Held for the Expansion of Individual Firms or Proposed for Alternative (Non B-Class) Uses		
E1.8: Clywedog Road North, Wrexham Industrial Estate	-1.90	Owner has aspirations to develop this land for services along with the neighbouring site (Site 9). Ecological issues may also make development difficult.
E1.9: Clywedog Road East, Wrexham Industrial Estate	-2.20	Owner has aspirations to develop this land for services along with the neighbouring site (Site 8). Ecological issues may also make development difficult.
E1.14: Dunster Road, Wrexham Industrial Estate	-0.80	Land will largely be held for the exclusive use of Lloyds Animal Foods Western.

Site	Cumulative Total Land Supply, ha	Justification for Site Exclusion from Supply
Site A: Abenbury Way (ii), JCB Expansion Land, Wrexham Industrial Estate	-6.00	Land is to the rear of JCB and held for the exclusive use of that company. The lack of independent access options would make it difficult to develop the site to accommodate other occupiers.
Site F: Redwither Road (II) Additional Site A, Wrexham Industrial Estate	-0.74	Held for the expansion of Nutrafeed.
Site Hi: Bridge Road (Firestone Site), Wrexham Industrial Estate	-26.00	Has consent for, and is under development for, a prison.
Site Hii: Bridge Road (Firestone Site), Wrexham Industrial Estate	-20.10	The bulk of this site will be retained to provide ecological mitigation associated with the adjacent prison scheme. However, adjacent owner F Lloyd Penley also has a requirement for some 2.4 ha of land here which also needs to be accounted for.
E1. 24: Vauxhall Industrial Estate, Johnstown	-0.71	Three sites, all of which appear to be being held by, or developed for the use of, adjacent occupiers.
E1.25: Llay Industrial Estate	-3.30	North Wales Police intend to build a new custody suite and offices here – Use Class C2A Secure Residential Institution
E1.26: Llay Industrial Estate	-2.90	North Wales Police intend to build a new custody suite and offices here – Use Class C2A Secure Residential Institution
E1. 29: Llay Industrial Estate	-1.20	Held as a long term asset by a national construction firm
E1.32:Coppi Industrial Estate, Rhos	-0.40	Remaining land In use for open storage
E1.37: Rhosddu Industrial Estate, Wrexham town	-0.90	Likely to be held as expansion land for Toolpak.
Site K: Llay Industrial Estate (H)	-0.80	Site in active use for lorry parking by P. R. Pugh Haulage Contractors
Site M: Ruabon Business Park, Adjacent A483	-19.58	The latest planning application for Ruabon Business Park would, if approved, see 85 percent of this site developed for non B-class uses.
Site O: Westminster Industrial Estate, Gwersyllt	-0.82	Likely to held as expansion land for D P Williams Holdings.
Site Q: North of Tomlinson's Dairies, Pen y Palamant Farm, Minera	-0.95	Likely to held as expansion land for Tomlinson's Dairies.
Reduced Supply Total	***103.69***	

Site	Cumulative Total Land Supply, ha	Justification for Site Exclusion from Supply
Sites Identified as having Ecological Constraints which May Render Some or all of the Land Undevelopable		
E1.4: Ash Road South (ii), Wrexham Industrial Estate	-3.65	Up to half of the site may be required as ecological mitigation for Great Crested Newts, reducing the net developable area to 3.65 ha.
E1.6: Bryn Cottages, Wrexham Industrial Estate	-3.60	Suggested by Council ecologists as a possible ecological refuge/mitigation site
E1.15: Former Tetra Pak, Wrexham Industrial Estate	-2.90	Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this land retained as an ecological mitigation site. However, it should be noted that the owners are seeking to dispose of this site as a development opportunity.
E1.19:Redwither (iv) , Wrexham Industrial Estate	-0.45	Includes semi improved grassland. Potentially up to half the land (0.45 ha) could be set aside as a wildlife corridor.
Site B: Cefn Park, Redwither Road, Wrexham Industrial Estate	-11.50	Part of a larger wildlife site with a wide range of ecological constraints which render the site undevelopable for B1/B2/B8 uses.
Site C Coed Aben Road (ii & iii), Wrexham Industrial Estate	-0.55	Small pond and wet area to the rear. Grizzled Skipper Butterflies and Great Crested Newt recorded on site. Council Ecologist view is that the central area of the site (some 0.55 ha) should be retained, for ecology, leaving the north and south of the site (1.15 ha) available for development.
Site G Redwither Road(i), Wrexham Industrial Estate	-0.99	Land could not be developed without the loss of much of the established woodland and the likely interference with the wildlife corridor. The Council Ecologist view is that this site would make an ideal ecological reserve area.
Final Reduced Supply Total (Realistic Supply)	**80.05**	**-**

Source: BE Group; 2014

6.15 Flintshire has a gross baseline supply of 326.13 ha. However, as Table 56 shows, some 44.53 ha is actually developed or has significant physical constraints. Another 57.66 ha is likely to be held to meet the expansion needs of specific businesses and cannot be considered part of the readily available employment land supply or is

proposed for alternative uses. Removing all these sites gives a realistic employment land supply of **223.94 ha.**

Table 56 – Flintshire Land Supply Scenarios

Site	Cumulative Total Land Supply, ha	Justification for Site Exclusion from Supply
Baseline	326.13	-
Sites Already Developed or With Constraints		
EM1.3: Mount Pleasant Road (north), Buckley	-2.00	Site (largely) developed for industrial premises.
EM1.11: Land to the East of Shotton Paper, Deeside	-22.63	22.63 ha in the south of this 32 ha site has now been developed for a convertor station.
EM1.18: Mold Business Park, Mold	-1.40	1.40 ha in western site developed as premises for Atmos Consulting, reducing site size to 3.90 ha.
EM2.2: DARA Site, Sealand	-18.50	Site comprises a complex of buildings, much of which appears to be in use. Further assessment needed to identify the real developable area here. The viability/deliverability of land here should also be explored
Reduced Supply Total	***281.6***	***-***
Sites Likely to be Held for the Expansion of Individual Firms or Proposed for Alternative (Non B-Class) Uses		
EM1.4: Land North of Buckley Station, Buckley	-0.60	Held as expansion land for Buckley Foods
EM1.7: Former Power Station, Connah's Quay	-12.80	Land to the rear of the existing power station and could not be developed separately from this facility
EM1.10: Land to the North of Shotton Paper, Deeside	-24.00	Will be held as expansion land for UPM Shotton
EM1.13: Greenfield Business Park, Phase I, Geenfield	-1.30	Land is to the rear of Westbridge Furniture and held for the exclusive use of that company. The lack of independent access options would make it difficult to develop the site to accommodate other occupiers.
EM2.4: Mold Business Park Extension, Mold	-5.00	Site is now being progressed for social housing through the SHARP Programme
Planning Application 1: Airbus 1, Chester Road, Broughton	-1.03	Expansion land for Airbus
Planning Application 2: Airbus 1, Chester Road, Broughton	-6.36	Expansion land for Airbus
Planning Application 3: Corus	-6.23	Expansion land for Tata

Site	Cumulative Total Land Supply, ha	Justification for Site Exclusion from Supply
Colours, Weighbridge Road, Deeside Industrial Park, Deeside		
Planning Application 5: Pany Y Buarth Depot, Pant Y Buarth, Gwernaffield, Mold	-0.34	Expansion land for A E Rowlands Plant Hire
Final Reduced Supply Total (Realistic Supply)	**223.94**	**-**

Source: BE Group; 2014

Wrexham Land Supply Analysis

6.16 Table 57 shows how the land is distributed through Wrexham County Borough. Unsurprisingly, the largest supply, accounting for more than two thirds of the total, is at Wrexham Industrial Estate. This comprises some 141.07 ha, although when land considered unlikely to come forward or proposed for alternative uses is excluded, that total reduces to 56.04 ha.

6.17 There is baseline supply of 16.47 ha at Llay Industrial Estate, of which 10.27 ha is already developed or probably undevelopable. The North Wales Police HQ scheme (Use Class C2A custody centre) is proposed on the remaining 6.20 ha, meaning that there is no readily available development land at Llay.

6.18 There is a modest supply of 9.70 ha within the settlement boundary of Wrexham town. Almost all of this (8.80 ha) comprises the Western Gateway site in the west, with the remainder at Rhosddu Industrial Estate.

6.19 There are employment land options in most of the main settlements in the north west and south west of the County Borough. The only large settlements which completely lack land are Gresford in the north east and Cefn-Mawr and Chirk in the south. There is also no land in the rural south east of the County Borough.

6.20 Out of the total land supply of 204.91 ha, just 2.8 percent (5.76 ha) is serviced. This comprises land at Wrexham Industrial Estate, including partially developed sites around Abenbury Way, Clywedog Road South and Redwither.

Table 57 – Distribution of Sites

Area	All Employment Land, ha	Serviced Land, ha	Realistic Supply
Wrexham Industrial Estate	141.07	5.76	56.04
Llay Industrial Estate	16.47	-	0
Wrexham town	9.70	-	8.8
North West Settlements – Brymbo, Gwersyllt, Minera, Pandy, Southsea	12.16	-	10.39
South West Settlements – Acrefair, Johnstown, Rhos, Ruabon	25.51	-	4.82
Total	**204.91**	**5.76**	**80.05**

Source: BE Group 2014

6.21 A site is assumed to be serviced if utilities and road access are readily available. This would apply to infill sites in existing employment areas or where major sites have been opened up. Large allocations, where although services run to the edge of the site they have not been provided into the site itself, are not considered to be serviced. For this reason, the bulk of the land supply at Wrexham Industrial Estate or on strategic sites such as Western Gateway cannot be considered serviced until the relevant infrastructure is delivered and development plots prepared.

6.22 Land is divided between three types of uses – B1 Business (primarily office, but can include research and development and light industrial uses), B2 General Industry and B8 Warehousing. Table 58 shows that 40 percent of the Wrexham's land could be suitable for any of these uses. The main exceptions include some 8.80 ha of land at Western Gateway, which will be taken up by an office-based business. In Wrexham Industrial Estate the 32.20 ha, E3 UDP Single User Site also has consent (won at appeal) for a B2/B8 scheme, while land at Bridge Road (former Firestone Site) will (primarily) be developed as a prison, with some land retained for associated ecological mitigation activities. 6.20 ha of land at Llay Industrial Estate will be developed by North Wales Police for a new custody centre and offices (Use Class C2A).

Table 58 – Anticipated Land Use

Site Type	Total, ha
B1	8.80
B1, B2	6.50

Site Type	Total, ha
B2	12.21
B2, B8	32.20
B8	5.40
B1, B2, B8	87.50
Prison/custody centre (C2A)	52.30
Total	**204.91**

Source: BE Group 2014

6.23 Each site has been assessed for its expected availability, the point at which it may come to market or be developed. This is derived from consultations with owners, agents, the Council and other evidence gathered in this study.

6.24 As Table 59 shows, 29.65 ha is immediately available for development at Wrexham Industrial Estate. This primarily comprises land at Bridge Road (former Firestone Site) which will be developed as a prison over the next 12 months, along with several smaller plots which have already been developed. Other sites have constraints of some nature that need to be addressed, have no proposals associated with them at present or are the subject of proposals that are unlikely to be brought forward in less than a year.

Table 59 – Land Availability

Area	Availability, years				Totals
	0-1	1-3	3-5	5+	
Wrexham Industrial Estate	29.65	57.33	6.80	47.29	141.07
Llay Industrial Estate	-	6.20	-	10.27	16.47
Wrexham town	-	8.80	-	0.90	9.7
North West Settlements – Brymbo, Gwersyllt, Minera, Pandy, Southsea	-	1.23	0.82	10.11	12.16
South West Settlements – Acrefair, Johnstown, Rhos, Ruabon	-	-	23.00	2.51	25.51
Total	**29.65**	**73.56**	**30.62**	**71.08**	**204.91**

Source: BE Group 2014

6.25 There is strong interest in the Western Gateway site from a defined occupier. However, Reserved Matters consents still have to be obtained for this site and further infrastructure is required. Therefore development will not commence immediately here, but is expected to occur in a 1-3 year timeframe. On the E3 UDP Single User Site, Wrexham Industrial Estate, outline consent has now been secured for a B2/B8 scheme but, reserved matters applications have still to be submitted, so again development is unlikely to commence in less than a year. Proposals for a Police HQ at Llay Industrial Estate will also need planning permission which may take a year or more to achieve.

6.26 At Ruabon Business Park, Adjacent to the A483, a new outline application, distinct from the earlier consents, for a mixed use proposal is still to be decided by the Council. Thus development proposals remain relatively tenuous here and a 3-5 year period is considered a realistic timeframe for site development of any scheme ultimately consented.

6.27 Some 71.08 ha comprises a long term (5+ year) supply. Apart from the sites highlighted in Table 55 above, this does not mean that the land will necessarily never come forward for development, rather that there are no development plans for the site at this time. This, of course, could change at any time during the next five years. Overall, just under half of the land supply is unlikely to be available in less than three years.

Site Grading

6.28 All sites have been graded using a standard scoring system (see Appendix 6). Each site is scored out of 100, made up of ten individual measures, each scored out of ten. These are: strategic highway proximity, A483/A5 proximity, prominence, public transport, planning status, services availability, constraints, environmental setting, flexibility and availability. The detailed scores are provided in Appendix 7.

6.29 Two scores are provided in Table 60, a total score and a market-led score, which reflect the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, A483/A5 proximity, prominence, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects, which combine to make up the total

score, are much easier to improve and hence provide the ability to raise the quality of a site.

Table 60 – Wrexham Sites Scoring

Site Ref.	Site Name	Land Available, ha	Total Score, max 100	Market-led Sub-total, max 50	Site Excluded from the Realistic Supply*
E1.39	Ruthin Road Development Area (Western Gateway)	8.80	83	50	No
M	Ruabon Business Park, Adjacent A483	23.00	77	47	Yes (part)
Hi	Bridge Road (Firestone site)	26.00	66	28	Yes
E1.7	Bryn Road	3.65	62	20	Yes
E1.22	Wynnstay Industrial Estate	1.40	62	33	No
E1.23	Gresford Industrial Estate	1.10	62	42	No
E1.10	Clywedog Road South (i)	1.21	61	20	No
Q	North of Tomlinson's Dairies, Pen y Palamant Farm	0.95	60	22	Yes
E1.20	Redwither (v)	2.85	60	28	No
P	Land at Minera Building Supplies, Five Crosses Industrial Estate	0.28	57	19	No
E1.35	Pandy Industrial Estate	0.70	57	27	No
E3	UDP Single User Site	32.20	55	29	No
O	Westminster Industrial Estate	0.82	55	24	Yes
E1.2	Abenbury Way	1.70	53	24	No
E1.12	Clywedog Road South (iii)	6.50	52	22	No
E1.14	Dunster Road	0.80	52	19	Yes
E1.30	Llay Industrial Estate	0.47	52	20	Yes
K	Llay Industrial Estate (H)	0.80	52	20	Yes
E1.25	Llay Industrial Estate	3.30	51	27	Yes
E1.26	Llay Industrial Estate	2.90	51	27	Yes
E1.11	Clywedog Road South (ii)	1.96	51	20	No
E1.37	Rhosduu Industrial Estate	0.90	51	24	Yes
E1.4	Ash Road South (ii)	7.30	50	28	Yes (part)
L	Former Brymbo Steelworks	8.00	49	28	No
E1.32	Coppi Industrial Estate	0.40	49	19	Yes
Hii	Bridge Road (Firestone site)	20.10	48	28	Yes
E1.17	Redwither (ii)	0.90	47	19	No

Site Ref.	Site Name	Land Available, ha	Total Score, max 100	Market-led Sub-total, max 50	Site Excluded from the Realistic Supply*
E1.19	Redwither (iv)	0.90	47	19	Yes (part)
E1.21	Ridley Wood Road	3.30	47	22	No
A	Abendbury Way (ii), JCB Expansion Land	6.00	47	24	Yes
E1.13	Coed Aben Road	0.17	46	16	No
E1.8	Clywedog Road North	1.90	45	21	Yes
E1.29	Llay Industrial Estate	1.20	43	21	Yes
E1.15	Former Tetra Pak	2.90	43	23	Yes
G	Redwither Road (i)	0.99	42	25	Yes
E1.28	Llay Industrial Estate	1.40	41	25	Yes
E1.9	Clywedog Road East	2.20	41	21	Yes
E1.31	Llay Industrial Estate	6.40	40	24	Yes
F	Redwither Road (ii)	0.74	39	19	Yes
C	Coed Aben Road (ii & iii)	1.70	38	20	Yes (part)
N	Buildings 5&6, Plas Power Colliery	0.31	37	20	No
E1.24	Vauxhall Industrial Estate	0.71	36	18	Yes
E1.6	Bryn Cottages	3.60	33	15	Yes
B	Cefn Park, Redwither Road	11.50	28	19	Yes

Source: BE Group 2014

**Sites already developed, with constraints, held for the expansion of individual firms, proposed for alternative (non B-Class) uses or sites identified as having ecological constraints which may render some or all of the land undevelopable, as defined in Table 55.*

6.30 The best scoring site in market terms and overall is Ruthin Road Development Area (Western Gateway), Wrexham town. This reflects the fact that Western Gateway is on a large, flexible and largely unconstrained site in an area of reasonable environmental quality, with direct access to the A483 and the services and infrastructure of Wrexham town. Ruabon Business Park, Adjacent A483 also scores well by virtue of its prominent location, flexible nature and high environmental quality, even if development here is unlikely in the short term.

6.31 Land at Wrexham Industrial Estate (with the exception of the Former Firestone Site where the prison development is underway) scores more modestly reflecting the fact that land here is (notwithstanding recent highways investment) slightly more distant

from strategic highways routes and that many sites are constrained by ecological issues. Most sites at Llay Industrial Estate, with the exception of those associated with the Police HQ proposal, have no development proposals associated with them. This reduces the site scorings at this location.

6.32 The worst performing site overall is Cefn Park, Redwither Road which is inaccessible, located in the backlands and (as is discussed above) may no longer be developable due to ecological constraints.

Flintshire Land Supply Analysis

6.33 Table 61 shows how the land is distributed through Flintshire County. The largest supply, accounting for almost exactly half of the total, is at Deeside. This includes the 98 ha, Land to North West of Garden City site and some 56 ha around UPM Shotton.

Table 61 – Distribution of Sites

Area	All Employment Land, ha	Serviced Land, ha
Broughton	71.09	16.39
Buckley	4.00	2.00
Connahs Quay	16.25	-
Deeside/Shotton	162.83	32.23
Ewloe	0.80	-
Flint	0.68	-
Greenfield	13.50	2.50
Mold	11.34	1.04
Mostyn	3.00	-
Queensferry	3.50	-
Rhydymwyn	1.10	1.10
Saltney	15.70	-
Sandycroft	3.50	-
Sealand	18.84	18.50

Source: BE Group 2014

6.34 There is baseline supply of 71.09 ha at Broughton. More than half of this (36.50 ha) comprises the Warren Hall site which may need a degree of public support to bring forward. This issue is considered further in Sections 10.0 and 11.0, however, it is likely that deliverability would be enhanced through a review of the appropriate mix of development here, potentially including higher value uses, appropriate to this

location, such as housing, retail, hot food and leisure. The public sector ownership of the site also provides opportunities for a Joint Venture agreement with a developer in which the public sector owner can tailor its input, and the level of financial return it takes out, to ensure development is both viable and attractive to a developer.

6.35 Another 7.39 ha comprises planning consents within the secure Airbus site, which are only available to meet the needs of that firm.

6.36 The remaining land is distributed (relatively) evenly across the main settlements of the County. Land on the Flint Coast is focused around Greenfield Business Park, where some 13.50 ha is potentially available, albeit with significant constraints in places.

6.37 Of the towns in the south, some 11.34 ha is potentially available at Mold, most around Maes Gwern and the A494 in the south of the town. However, this includes the 5 ha EM2.4: Mold Business Park Extension, Mold site which is now proposed for housing. Thus the real supply is a more modest 6.34 ha.

6.38 There is also a reasonable supply of some 34.54 ha around the periphery of Chester, at Saltney and Sealand. However, over half of this (18.50 ha) comprises the complex EM2.2: DARA Site, Sealand whose real development prospects, and net developable area remain unclear. A stronger development prospect is EM1. 24: Land East of Saltney Ferry Road, Saltney (14.60 ha) which is on the market for B-Class uses and available subject to some constraints, particularly local transport issues, being overcome.

6.39 Out of the total land supply of 326.13 ha, 22.6 percent (73.76 ha) is serviced. This comprises several partially/fully developed sites around Broughton, Deeside and Mold. It also includes brownfield sites which sit within developed industrial complexes such as Airbus. A larger proportion of Flintshire's land supply falls within this latter category than was the case in Wrexham.

6.40 Land is divided between three types of uses – B1 Business (primarily office, but can include research and development and light industrial uses), B2 General Industry and B8 Warehousing. Table 62 shows, as in Wrexham, almost three quarters of the Flintshire's land could be suitable for any of these uses. B1 land includes Warren Hall

(proposed as a B1 business park, although some flexibility can be assumed to ensure delivery), the remaining office plot at St David's Park, Ewloe and land at Tata, Deeside which has consent for and office and R&D facility. A further 43.53 ha, primarily around Deeside is proposed for heavy industrial facilities which should be classed as B2 uses.

6.41 Site EM1.12: Land to North West of Garden City, Deeside is proposed for a diverse mix of uses including some housing, local retail, leisure and education uses. The full range of B1, B2, B8 uses although reflecting current development proposals and likely market demand in Deeside, the emphasis is likely to be on larger B2 and B8 uses.

6.42 One key difference between Flintshire and Wrexham is that there are no proposals for major logistics developments, comparable to that on the 32.20 ha, E3 UDP Single User Site at Wrexham Industrial Estate. Thus only 1.76 ha in Flintshire is considered as being (primarily) suitable for B8 Storage or Distribution.

Table 62 – Anticipated Land Use

Site Type	Total, ha
B1	43.53
B2	41.36
B8	1.76
B1, B2, B8	238.78
Residential	0.70

Source: BE Group 2014

6.43 Each site has been assessed for its expected availability, the point at which it may come to market or be developed. This is derived from consultations with owners, agents, the Council and other evidence gathered in this study.

6.44 As Table 63 shows, only 3.72 ha is likely to be brought forward in less than a year, only 16 percent of the supply in Flintshire. This comprises a small number of sites where consented development is complete, or nearing completion. Elsewhere, sites have constraints of some nature that need to be addressed, have no proposals associated with them at present, or are the subject of proposals, that are likely to be brought forward in less than a year.

Table 63 – Land Availability

Area	Availability, years				Totals
	0-1	1-3	3-5	5+	
Broughton	-	16.39	54.70	-	71.09
Buckley	2.00	1.40	-	0.60	4
Connahs Quay	-	3.45	-	12.80	16.25
Deeside/Shotton	-	38.23	24.00	99.90	162.13
Ewloe	-	-	0.80	-	0.8
Flint	0.68	-	-	-	0.68
Greenfield	-	-	5.70	7.80	13.5
Mold	1.04	5.30	-	5.00	11.34
Mostyn	-	3.00	-	-	3.0
Queensferry	-	3.50	-	-	3.5
Rhydymwyn	-	-	-	1.10	1.1
Saltney	-	1.10	14.60	-	15.7
Sandycroft	-	3.50	-	-	3.5
Sealand	-	1.04	-	18.50	19.54
Total	**3.72**	**76.91**	**99.8**	**145.7**	**326.13**

Source: BE Group 2014

6.45 In Broughton, there is good interest in the land Hawarden Park which is largely unconstrained and likely to come forward over 1-3 years. As has been noted elsewhere, Warren Hall is deliverable, subject to the appropriate mix of uses, and is there is assumed to be a medium term (3-5 years) prospect for development here. There are also good medium term prospects for at least on the 56 ha around UPM Shotton. On Land to North West of Garden City, the developers are presently working to a 12-year timeframe to complete all phases, commencing in summer 2014.

6.46 Elsewhere, there is, at least tentative, developer/occupier interest in most sites. Plans are being developed which, subject to planning in some cases, see much of the land in Mold, Mostyn, Queensferry and Sandycroft taken up over the next three years.

Site Grading

6.47 As for Wrexham, all sites have been graded using a standard scoring system (see Appendix 6). Each site is scored out of 100, made up of ten individual measures, each scored out of ten. These are: strategic highway proximity, A55 proximity, prominence, public transport, planning status, services availability, constraints, environmental setting, flexibility and availability. The detailed scores are provided in Appendix 8.

6.48 Two scores are provided in Table 64, a total score and a market-led score, which reflect the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, A55 proximity, prominence, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects, which combine to make up the total score, are much easier to improve and hence provide the ability to raise the quality of a site.

Table 64 – Flintshire Sites Scoring

Site Ref.	Site Name	Land Available, ha	Total Score, max 100	Market-led Sub-total, max 50	Site Excluded from the Realistic Supply*
EM2.1	Warren Hall	36.50	79	48	No
EM1.12	Land to North West of Garden City	98.00	74	39	No
Plan App. 4	Site off Aber Road	0.68	74	33	No
Plan App. 2	Airbus II, Chester Road	6.36	71	30	No
EM1.1	Chester Aerospace Park	9.00	70	31	No
EM1.3	Mount Pleasant Road (north)	2.00	70	25	Yes
EM1.5	Drury New Road	1.40	69	34	No
EM2.3	St David's Park	0.80	69	35	No
Plan App. 1	Airbus I, Chester Road	1.03	67	26	No
EM1.21	Chester Road East	3.50	65	30	No
EM2.2	DARA Site	18.50	63	42	No
EM1.17	Broncoed Industrial Estate	0.70	63	23	No
Plan	Pany Y Buarth Depot,	0.34	63	18	No

Site Ref.	Site Name	Land Available, ha	Total Score, max 100	Market-led Sub-total, max 50	Site Excluded from the Realistic Supply*
App. 5	Pant Y Buarth, Gwernaffield				
EM1.4	Land North of Buckley Station	0.60	62	35	Yes
EM1.10	Land to North of Shotton Paper	24.00	62	35	Yes
EM1.2	Manor Lane/Hawarden Park Extension	18.20	59	36	No
EM1.11	Land East of Shotton Paper	32.00	59	28	Yes (part)
EM1.26	Rowley's Drive	0.70	59	26	No
EM1.22	Antelope Industrial Estate	1.10	58	31	No
EM1.24	Land East of Saltney Ferry Road	14.60	58	31	No
Plan App. 8	Deeside Industrial Park – Zone 1	1.90	57	25	No
Plan App. 7	Bradford Soap Works, Minerva Avenue, Chester West Employment Park	0.34	55	17	No
EM1.7	Former Power Station	12.80	54	36	Yes
EM1.19	Adjacent Mostyn Docks	3.00	52	28	No
EM1.23	River Lane	1.10	52	24	No
Plan App. 3	Corus Colours, Weighbridge Road, Deeside Industrial Park	6.23	50	14	No
EM1.18	Mold Business Park	5.30	49	24	Yes (part)
EM1.15	Greenfield Business Park, Phase III	4.40	46	27	No
Plan App. 6	Babbage Road, Engineer Park	1.70	46	15	No
EM1.25	Prince William Avenue	1.80	43	18	No
EM1.13	Greenfield Business Park, Phase I	1.30	42	19	Yes
EM1.14	Greenfield Business Park, Phase II	1.20	42	15	No
EM1.8	Crumps Yard, Dock Road	3.45	38	17	No
EM1.16	Greenfield Business Park (III) Extension	6.60	38	20	No
EM2.4	Mold Business Park Extension	5.00	37	24	Yes

Source: BE Group 2014

**Sites already developed, with constraints, held for the expansion of individual firms or proposed for alternative (non B-Class) uses, as defined in Table 56.*

6.49 The best scoring site, both overall and in market terms is Warren Hall, Broughton. This reflects the fact that Warren Hall is a large, flexible and largely unconstrained greenfield site in an area of reasonable environmental quality, on an A road. Size, flexibility and proximity to the strategic road network also helps Land to North West of Garden City, Deeside to score well as do the major development plans which are already being enacted here.

6.50 Land elsewhere in Deeside scored more modestly reflecting the fact that other sites are more distant from strategic highways routes, partially constrained and include plans for development which, in places, are still some years from being realised.

6.51 The worst performing site (by overall score) is the Mold Business Park Extension which is a very long term allocation, which has seen only 1 ha of land take-up since 1996. Constrained by ecological and flood risk issues, development costs are expected to be high and development for B Class employment uses. The site is now proposed for social housing. Land at Greenfield Business Park generally scores worst in market terms, reflecting the fact that these are backland sites, constrained by ecological issues and some distance from the strategic road network.

Employment Areas Assessments

6.52 BE Group has reviewed a total of 61 Employment Areas across the study area, 31 in Wrexham, 30 in Flintshire. In the case of Wrexham, this includes areas that are principally industrial estates, areas allocated in the UDP for employment purposes, areas with extant permissions together with land in use by large B1/B2/B8 employers. Apart from those which are allocated or have permission, none of the areas are currently protected in the adopted Unitary Development Plan. In the case of Flintshire, all are allocated for employment purposes in Policy EM3 – 'Development Zones and Principal Employment Areas' of the Unitary Development Plan.

6.53 Each area has been appraised and assessed through a combination of site visits, local intelligence, consultations with some owners and the views of those involved in the local property market. Proformas have been completed for each area and are

accompanied by site plans. These are included at Appendices 9 and 10. Some key points to note about the proformas are:

- Area boundaries are based on Geographic Information Systems (GIS) plans provided by the two Councils. Area sizes are also calculated from GIS
- In 'Area Reference' the local authority's planning policy descriptor is provided;
- The 'Name' contains the local authority's designated title for the area
- A brief 'Description' is provided in the form of the consultancy team's comment on the area
- In a multi-occupier scheme, 'Occupier(s)' lists the major occupiers only
- 'Prominence' assesses the visibility of each area from adjacent main roads. Areas can have Good, Average or Poor prominence
- 'Current Use (Use Classes)' identifies whether buildings in the area are in office/light industrial (B1, Classes II/III); general industrial (B2) and/or warehouse (B8) uses In some cases areas may also contain an element of retail (A1), food retail (A3-A5) or motor retail (Sui Generis)
- An indication is provided of the age of properties in each of four categories assessed in 'Buildings Age'. These are established (pre-1945; 1945-90; 1990-2000) and modern (2000+)
- 'Buildings Quality' is also broken down into three category assessments. 'Poor' represents low quality design, externals, and condition. 'Good' equates to modern design, building condition, parking and external area provision. The remaining category is 'Average', covering properties that do not fit the other two headings
- Constraints' can be physical, environmental or planning based and will lower the quality of the area and/or limit existing or proposed business operation
- 'Critical Mass' indicates whether the area has sufficient supply of existing premises, and occupiers, to encourage further businesses to locate within the area and (potentially) encourage further expansion
- Vacant land is identified, as is the scope for remodelling of particular properties or sites. Expansion possibilities are also included. All of these are identified, for simplicity, as 'Opportunities for redevelopment/expansion'
- Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a number of factors – critical mass of the area, companies like to cluster; accessibility, the closer to motorways and arterial roads the better; prominence, to main roads, and environment – setting of the location, servicing, parking and landscape

treatment. For each element assessments are made as Poor, Average or Good. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table 65

- Finally, recommendations for the future role of the area are set out.

Table 65 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the LDP
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments.	Promote alternative uses if possible
E		

Source: BE Group 2014

6.54 The template for the employment areas' proforma is included at Table 66.

Table 66 – Employment Area Proforma Template

Map	
LDP Area Reference	
Name	
Description	
Key Occupier(s)	
Prominence	
Current Use (Use Classes)	
Size, ha	
Building Age	

Building Quality	
Constraints	
Critical Mass	
Opportunities for redevelopment/ expansion	
Other Information	
Grading and Recommendations	

Source: BE Group, 2014

6.55 Table 67 provides a summary of the assessment of the 31 identified employment areas in Wrexham County Borough. Appendix 10 contains the full assessment.

Table 67 –Summary of Wrexham's Existing Employment Areas

Area	Size, ha	Grading	Recommendations
1: Wrexham Industrial Estate	513.45	Critical mass: Good Accessibility: Good Prominence: Average Environment: Good **Total Grade: A**	**Retain** as a flagship regional/national employment area for B1/B2/B8 uses. Include the E3 Single User Site in the settlement limit of the estate. Exclude the local wildlife area (W337) from the settlement area. The Estate is also likely to be a focus for future employment land provision in Wrexham, particularly if much of the existing (viable) employment land is taken up by inward investment, the prison development and existing company expansion in the short and medium term. Several candidate sites have been submitted for consideration for employment uses in the LDP (WIE05, 06 and 07). These include land at the junction of Cefn Road, Bedwell Road and Bridge Road in Wrexham Industrial Estate, which could be considered as a location for further growth. Consider options for the growth and expansion of the estate (see Section 10.0).
2: Llay Industrial Estate, Llay	82.7	Critical mass: Good Accessibility: Good Prominence: Average Environment: Average	**Retain** as major local/sub-regional employment area for B1/B2/B8 uses. **Protect** existing expansion sites to ensure the future growth of this key employment area.

Area	Size, ha	Grading	Recommendations
		Total Grade: A	
3: Former Steelworks Site, Brymbo	8.00	Critical mass: N/A Accessibility: Average Prominence: Average Environment: Average **Total Grade: N/A**	**Protect** as local employment area for B1/B2/B8 uses, but only if evidence of the likely development of employment premises is provided by the owner/developers.
4: Canal Wood Industrial Estate, Chirk	Included as part of Chirk Industrial Estate (Site 25)	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
5: Vauxhall Industrial Estate, Johnstown	23.70	Critical mass: Good Accessibility: Average Prominence: Average Environment: Poor **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses. Sites with prominent Ruabon Road frontage may be appropriate for a more diverse range of uses including trade and (limited) retail options, reflecting the foodstore consent.
6: Croesfoel Industrial Estate and Bersham Enterprise Centre, Rhostyllen/ Bersham	17.00	Critical mass: Good Accessibility: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) Prominence: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) Environment: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) **Total Grade: B/C**	Consider separating these three distinct parts of Croesfoel Industrial Estate (roadside services, motor retail and industrial/warehousing) in the emerging LDP, with the goal of protecting the larger industrial/warehouse premises in the north from loss to alternative uses. **Retain** Bersham Enterprise Centre as local employment area for B1/B2/B8 (and appropriate ancillary) uses. .
7: Gresford Industrial Estate, Wrexham Town	18.15	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good	**Retain** as site for key local employers (B1/B2/B8 uses).

Area	Size, ha	Grading	Recommendations
		Total Grade: B	
8: Wynnstay Technology Park, Cefn/Acrefair	8.42	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Good **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
9: Wrexham Western Gateway, Wrexham Town	14.78	Critical mass: N/A Accessibility: Good Prominence: Good Environment: Good **Total Grade: A**	**Protect** as a third phase of Wrexham Technology Park. Actual employment area likely to be 8.80 ha.
10: Wrexham Technology Park, Wrexham Town	23.30	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: A**	**Retain** as mixed-use employment area for B1/B2/B8 and a range of complimentary uses, most in the medical sector.
11: Five Crosses Industrial Estate, Coedpoeth	7.91	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
12: Rhosddu Industrial Estate, Wrexham Town	12.91	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
13: Advance Park Industrial Estate, Rhosymedre, Cefn/Acrefair	6.11	Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor **Total Grade: C/D**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses. However, it could also be usefully identified as a future site for regeneration investment, if

Area	Size, ha	Grading	Recommendations
			appropriate given other policy priorities.
14: Whitegate Industrial Estate, Queensway, Wrexham Town	10.10	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
15: Cambrian Price Industrial Estate, Rivulet Road, Wrexham Town	1.40	Critical mass: Poor Accessibility: Average Prominence: Poor Environment: Poor **Total Grade: D**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses in the short term. Consider future **release** to meet longer term needs.
16: Two Mile Industrial Estate, Brynteg	0.94	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
17: Penley Industrial Estate, Penley	4.40	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Poor **Total Grade: D**	Redevelopment opportunity site, however, any redevelopment should include a strong element of B1/B2/B8 uses.
18: Pandy Industrial Estate, Gresford, Wrexham Town	4.45	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
19: Southsea Industrial Estate, Southsea	1.82	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C/D**	**Retain** regenerated units as a local employment area for B1/B2/B8 (and appropriate ancillary) uses. Other derelict premises are potentially available to meet a range of commercial uses.

Area	Size, ha	Grading	Recommendations
20: Westminster Industrial Estate, Gwersyllt	3.81	Critical mass: Average Accessibility: Good Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
21: Coppi Industrial Estate, Rhos	3.94	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
22: Gardden Industrial Estate, Ruabon	6.42	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
23: Lightwood Green Industrial Estate, Overton	5.22	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: C**	**Protect** as rural employment area for B1/B2/B8 (and appropriate ancillary) uses. If one of the employers vacates, then land may be available for infill development. However, the current low density nature of the area is more appropriate for its rural location.
24: Llay Hall Industrial Estate and Riverside Business Park, Cefn y Bedd, Sydallt	7.88	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C**	**Protect** as rural employment area for B1/B2/B8 (and appropriate ancillary) uses.
25: Chirk Industrial Estate, Chirk	66.87 (This figure also includes adjacent Canal Wood Industrial Estate,	Critical mass: Poor Accessibility: Average Prominence: Good Environment: Average **Total Grade: B**	**Retain** as site for key employers (B1/B2/B8 uses). WCBC to consider if options for growth in the north (to accommodate Kronospan's stated expansion needs) can be accommodated in compliance with other policy objectives.

Area	Size, ha	Grading	Recommendations
	Ref. 4)		
26: Ruabon Business Park, Ruabon	23.00	Critical mass: N/A Accessibility: Good Prominence: Good Environment: Good **Total Grade: B**	**Protect** initially as employment area for (primarily) B1 uses. However, should it not prove possible to deliver a viable business park scheme here, given the detailed issues referred to in Appendix 10, then the site should be considered for alternate uses or, if no development options are appropriate and viable, retained as greenfield agricultural land.
27: Rossett Business Village, Rossett/Lavister	0.91	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C**	**Protect** as rural employment area for B1/B2/B8 (and appropriate ancillary) uses.
28: Pickhill, Cross Lanes, Cross Lanes	8.52	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: D**	Large rural dairy which appears to be partially/fully vacant at present. Assuming the area is not soon occupied by another business then it represents a large brownfield redevelopment opportunity. The rural nature of the facility means that development for alternative uses would be difficult. It is not therefore recommended that this site be protected for employment uses. Any future applications should be decided on their own individual merits.
29: Maelor Abattoir, Cross Lanes	0.88	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: N/A**	A small site, occupied by a solus operator that, it can be argued, forms part of the County Borough's agricultural sector rather than providing B-Class employment. Protection of this site for B Class employment would therefore appear unnecessary.

Area	Size, ha	Grading	Recommendations
30: Clutton Agricultural, Cross Lanes	1.76	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: N/A**	As with Maelor Abattoir, this site is seen to form part of the County Borough's agricultural sector rather than providing B-Class employment. Protection of this site for B Class employment would therefore appear unnecessary
31: Pulestone Industrial Estate, Wrexham Town	2.98	Critical mass: Average Accessibility: Good Prominence: Good Environment: Average **Total Grade: C**	Protection as a primarily B Class employment area is not appropriate and the area should perhaps remain as a relatively informal mixed use employment location in Wrexham.
Total	**891.73**		

Source: BE Group 2014

6.56 Inevitably the largest individual Employment Area is Wrexham Industrial Estate, which comprises 513.45ha. This represents about 60 percent of the employment areas total for the County Borough.

6.57 Table 68 provides the assessment of the 30 Employment Areas in Flintshire. Together they indicate that some 1,676.06 ha of land is in employment use across the Flintshire County. Of this, more than three quarters comprises (1,285.00 ha) the Deeside and Broughton Development Zones while the remaining 23.4 percent (391.06 ha) is within the Principal Employment Areas.

6.58 The largest of the EM3, Principal Employment Areas is Greenfield Business Park, Greenfield, which extends to some 70.24 ha if all the surrounding employment sites are included. This is 18.0 percent of the Principal Employment Areas total.

Table 68 –Summary of Flintshire's Existing Employment Areas

Area	Size, ha	Grading	Recommendations
Development Zones			
EM3 (Development Zone): Deeside Development	930.00	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average	**Retain** as a flagship regional/national employment area for B1/B2/B8 uses.

Area	Size, ha	Grading	Recommendations
Zone		**Total Grade: A**	
EM3 (Development Zone): Hawarden Industrial Park, Chester Aerospace Park and Airport Development Zone (Airbus), Broughton	355.00	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: A**	**Retain** as a flagship regional/national employment area for B1/B2/B8 uses.
Sub Total	***1,285.00***		
Principal Employment Areas			
EM3, Principal Employment Area 1 and 10: Greenfield Business Park, Greenfield	70.24	Critical mass: Good Accessibility: Average Prominence: Good Environment: Average **Total Grade: B**	**Retain** as site for key employers (B1/B2/B8 uses).
EM3, Principal Employment Area 2: Antelope Industrial Park, Rhydymwyn	4.95	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 3: Spencer Industrial Estate, Buckley	7.03	Critical mass: Good Accessibility: Average Prominence: Poor Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 4: Little Mountain Industrial Estate, Buckley	6.81	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C**	**Retain** as site for key employers (B1/B2/B8 uses).
EM3, Principal	5.02	Critical mass: Average	**Retain** as local employment area

Area	Size, ha	Grading	Recommendations
Employment Area 5: Rowley's Drive, Shotton		Accessibility: Good Prominence: Poor Environment: Average **Total Grade: C**	for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 6: Expressway Business Park, Queensferry	1.99	Critical mass: Average Accessibility: Average Prominence: Good Environment: Good **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 7: Evans Business Centre, Chester West	7.86	Critical mass: Good Accessibility: Average Prominence: Poor Environment: Good **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 8: St Davids Park, Ewloe	14.82	Critical mass: Average Accessibility: Good Prominence: Good Environment: Good **Total Grade: B**	**Retain** as site for key employers (B1 uses).
EM3, Principal Employment Area 9: Sandycroft Industrial Estate, Sandycroft	33.04	Critical mass: Average Accessibility: Average Prominence: Poor Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 11: Ashmount Industrial Estate, Flint	23.96	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: B**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses. The area boundary should also be extended to include the Kimberley Clark facility to the north.
EM3, Principal Employment Area 12: Castle	13.59	Critical mass: Good Accessibility: Poor Prominence: Poor	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.

Area	Size, ha	Grading	Recommendations
Park/Ashmount Industrial Centre, Flint		Environment: Poor **Total Grade: C**	The area boundary should also be extended to include developed elements of Castle Park to the north.
EM3, Principal Employment Area 13: Glen Industrial Estate, Saltney	5.22	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C**	**Retain** as site for key employers (B1/B2/B8 uses).
EM3, Principal Employment Area 14: Glendale Business Park, Sandycroft	13.85	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 15: Manor Industrial Estate, Bagillt	10.67	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 16: Pentre Industrial Estate, Pentre	33.75	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 17: Ewloe Barns (Industrial Estate), Alltami	4.76	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 18: Alltami Depot, Alltami	8.47	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.

Area	Size, ha	Grading	Recommendations
		Total Grade: C	
EM3, Principal Employment Area 19: Manor Park (Broughton Industrial Estate), Broughton	7.64	Critical mass: Average Accessibility: Good Prominence: Good Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 20: Queensferry Industrial Estate, Pentre	16.09	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 21: Engineer Park and St Ives Park, Sandycroft	26.53	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 22: Broncoed Industrial Estate, Mold	3.71	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 23: Drury Lane Industrial Estate, Buckley	1.19	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 24: Mold Business Park, Mold	2.96	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.

Area	Size, ha	Grading	Recommendations
EM3, Principal Employment Area 25: Catheralls Industrial Estate and Pinfold Industrial Estate, Buckley	6.99	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 26: Brynmau One, Two, Three and Four Estates, Saltney	12.46	Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 27: Mold Industrial Estate, Mold	8.18	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 28: The Borders Industrial Park and Chesterbank Industrial Park, Saltney	30.73	Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
EM3, Principal Employment Area 29: Dock Road, Connah's Quay	8.55	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C**	**Retain** as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
Sub Total	***391.06***		
Total	**1,676.06**		

Source: BE Group 2014

Summary

6.59 As of 31 March 2014, the baseline land supply of the study area was **531.04 ha,** including:

- 204.91 ha on 44 sites in Wrexham
- 326.13 ha on 35 sites in Flintshire.

6.60 However, this supply includes areas of land that are already developed, undevelopable due to site constraints, likely to be retained for specific occupiers, developed for non-employment uses or land which has identified ecological issues. Removing such land reduces the net land supply to 303.99 ha – 80.05 ha in Wrexham, 223.94 ha in Flintshire.

6.61 In Wrexham, the land supply is strongly focused in Wrexham Industrial Estate, which also includes all of Wrexham's serviced land. There is also 16.47 ha at Llay Industrial Estate while options in Wrexham town are largely limited to the Western Gateway site, which may be taken up over the next few years. There are at least some employment options in most of the smaller settlements in the north west and south west of the County Borough. Only Chirk in the far south and the rural east have no undeveloped employment sites in close proximity.

6.62 In Flintshire, half of the land supply is at Deeside although much of this is accounted for by just three sites – Land to North West of Garden City, Land to North of Shotton Paper and Land East of Shotton Paper. A further 71.09 ha is located at Broughton with more than half of this comprising the Warren Hall site. Away from these key industrial locations, employment land is more evenly distributed around the main settlements of the County. Settlements around the periphery of the Chester Conurbation, at Saltney and Sealand are particularly well supplied with industrial development land, capable of serving both Flintshire and Chester.

6.63 In principle, the availability of the existing supply is not a major issue in Wrexham. Almost two thirds could be brought forward in the medium term (1-5 years). There is also a modest supply of immediately available land, 29.65 ha, where development is underway or likely to commence shortly. However, it should also be noted that some 11.92 ha is actually developed or has significant physical constraints. Another 89.30 ha is likely to be held to meet the expansion needs of specific businesses and cannot be considered part of the readily available employment land supply or is proposed for alternative uses. Finally, 23.64 ha comprises land on sites which have identified

ecological issues. Those issues may mean that some, or all, of that site is rendered undevelopable and has to be retained for ecological mitigation. 85.03 ha of this land is at Wrexham Industrial Estate, reducing the supply there from 141.07 ha to 56.04 ha.

6.64 In Flintshire, the strongest development prospects are in the mid-range of 1-3 and 3-5 years. In Broughton, there is good interest in the land Hawarden Park which is largely unconstrained and likely to come forward over 1-3 years. Warren Hall is deliverable, subject to the appropriate mix of uses, and is there is assumed to be a medium term (3-5 years) prospect for development here. There are also plans or aspirations to develop many of the smaller sites which could see much of the allocated land in Mold, Mostyn, Queensferry, Rhydymyn and Sandycroft taken up within three years.

6.65 A review of Wrexham's 31 employment areas indicates that most are established office and industrial areas, of moderate quality, which are aimed at meeting local needs and should be protected for that purpose. These are generally graded C to B/C in this study's scoring. Wrexham's flagship (A Grade) locations are Wrexham Industrial Estate, Llay Industrial Estate, Llay and Wrexham Technology Park, Wrexham Town

6.66 Poor quality industrial sites include Advance Park Industrial Estate, Rhosymedre, Cefn/Acrefair, Cambrian Price Industrial Estate, Rivulet Road, Wrexham Town, Penley Industrial Estate, Penley and Southsea Industrial Estate, Southsea. Cambrian Price and Penley could ultimately be released for other appropriate uses

6.67 A review of Flintshire's 30 allocated employment areas indicates again that most are established office and industrial areas, of moderate quality, which are aimed at meeting local needs and should be protected for that purpose. These are generally graded C to B/C in this study's scoring. Flintshire's flagship (A Grade) locations are Deeside Development Zone, Hawarden Industrial Park, Chester Aerospace Park and Airport Development Zone (Airbus), Broughton. Lower quality space is at Pentre Industrial Estate, Pentre

6.68 There are a number of potential redevelopment/regeneration opportunities, in both Wrexham and Flintshire, which might deliver additional land supply, should it be

required (see Appendix 10). However these are caveated in that owner/developer aspirations for B1/B2/B8 development on these sites has not been tested.

7.0 STAKEHOLDER CONSULTATIONS

Introduction

7.1 This section provides commentary about Wrexham and Flintshire, drawn from consultations with the public sector and other stakeholders – primarily the major businesses and landowners. The larger businesses were identified in consultation with economic development officers from the two local authorities as being representative examples of the stock of mid-sized and larger businesses in Wrexham and Flintshire. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture.

7.2 This section also considers the property market in the four other local authority areas of North Wales (Anglesey, Gwynedd, Conwy and Denbighshire) as well as locations in England which are identified as having strong economic linkages to Wrexham and Flintshire – Cheshire West and Chester, Shropshire and Wirral. Understanding the supply and demand of employment land and premises in these linked areas is important in assessing their impact on the study area's land and property market.

Public Sector Bodies

Mersey Dee Alliance

7.3 The Mersey Dee Alliance (MDA) is a partnership that supports strategic economic activity spanning the North Wales/North West England border. It covers North East Wales, West Cheshire and Wirral and comprises a partnership of nine organisations:

- Cheshire West and Chester Council
- Denbighshire County Council
- FCC
- Glyndwr University
- Merseytravel
- University of Chester
- Welsh Government
- Wirral Metropolitan Borough Council
- WCBC.

7.4 Cheshire West and Chester Council is the Accountable Body for the Partnership

which has an annual budget of £63,000.

7.5 The MDA was created to manage the fractured economic geography of this Mersey-Dee sub region. It seeks to promote business development, particularly in the manufacturing sector, by helping businesses meet their skills needs, enhance sub regional transport infrastructure and develop viable supply chains.

7.6 Key project activities include:

- Development of the Innovation Network: The aim of the network to assist with growth of 'knowledge based' businesses in the sub-region encouraging joint working, proving links to business support sources and bringing business start-ups and micro firms together with larger companies to help foster supplier networks
- Development of a Green Infrastructure Framework for the Sub Region
- Commissioning Research Work: Most recently this has included a report into sub-regional Growth and Investment Prospects (May 2014). MDA is also looking to develop a Communication Strategy
- Working with Schools, Colleges and Universities to Link Local Students with Careers Opportunities.

Wrexham County Borough Council

Wrexham Industrial Estate

7.7 As shown in Table 53 of Section 6.0, there is a land supply on Wrexham Industrial Estate of 141.07 ha. However, this could also be reduced to a realistic supply of 56.04 ha as a result of the comments made in relation to Table 55. Council economic development officers argue that there is a shortage of readily available land on which to create an 'offer' for the future marketing of the estate.

7.8 Many of the smaller sites in Wrexham Industrial Estate are constrained by ecology while several large sites have been lost to strategic development proposals such as the North Wales Prison, power station proposal and (following a recent planning appeal) logistics facilities for Norbert Dentressangle.

7.9 Demand for land is strong here and includes large (2-4.5 ha) requirements from some five large local businesses with expansion needs extending up to 18,850 sqm

each. The Council also receives regular inward investment enquiries from numerous locations both nationally and internationally.

7.10 At the smaller end of the scale, Council officers also report strong demand from small businesses (30-40 employees) looking for 0.4 ha plots which could provide design and build options, for owner occupation. This demand is partly driven by a lack of freehold property in the area but also reflects the desire of business owners to make personal property investments.

7.11 In terms of premises, demand and supply analysis for the past three years indicates that there remains demand for smaller industrial units, up to 465 sqm. Demand is particularly strong for 46-185 sqm industrial buildings and is likely to remain so. Demand is starting to increase for offices, especially up to 46 sqm. However, it is less strong than industrial

7.12 Premises demand is also high relative to supply. First Investments have some 51,096 sqm of existing space in Wrexham Industrial Estate which is currently 98 percent occupied. Its property is relatively modern, well maintained and configured to market needs and offered at realistic rental levels. It is expected that First will proceed with further developments of small business space in the short and medium term. Generally, around half the property enquiries Wrexham County Borough Council receives are for Wrexham Industrial Estate, while 20 percent are for Llay Industrial Estate and the rest are for other locations in the County Borough.

7.13 There is a shortage of larger industrial and warehouse premises in the County Borough. This could be provided across the broader region, where the Deeside Enterprise Zone could compliment Wrexham by providing larger premises. However, the market shows that many of the businesses currently established on Wrexham Industrial Estate want to remain in Wrexham and expand.

7.14 Studies show that the demand for office space is lower than that for workshop and warehouse. The interest in smaller offices (under 46 sqm) remains fairly strong. However, the larger offices are more difficult to let/sell as demonstrated by the Gladman office development at Wilkinson Court on Wrexham Industrial Estate, which still remains 30 percent vacant four years after completion. The space is modern and portrays an excellent image. These will be offices for the future. However, there is

still a gap in the market for smaller modern office accommodation. Gladman has recently divided offices into smaller space, which is now working, and allowing the introduction of the second phase of the development into the market.

7.15 Given this strength of demand it is argued that there is a case for allocating further land around Wrexham Industrial Estate, both to allow the future growth of the estate and provide sites which can meet both the needs of existing firms and be marketed to future inward investors.

7.16 Suggested areas of search for new employment land allocations at Wrexham Industrial Estate (put forward by economic development officers, without prejudice to planning policy constrains) could include greenfield agricultural land in the north of the estate, east and west of the northern entrance road (Industrial Estate Road). Land in the south west, at the junction of Cefn Road, Bedwell Road and Bridge Road South (the subject of recent highway improvements) could also provide employment land options which could possibly be combined with some (ancillary) services such as a Petrol Filling station.

Western Gateway Project (Wrexham Technology Park Phase 3)

7.17 WCBC has been actively pursuing development of Phase 3 of the Wrexham Technology Park since 2003, and is now the major landowner. The project commenced in 2005 with the development of private/public sector housing units and approximately 300 units have now been completed by Redrow and Miller Homes. A Morrisons foodstore was opened on nearby land in 2011.

7.18 To improve communication links the Council completed a major road improvement project in 2013 which widened Croesnewydd Road, and created a new junction serving future development to the west and east of the site. Land to the east of this new junction was sold in 2012 to the Welsh Ambulance Services NHS Trust, and proposals for a new Joint Emergency Services Centre (Ambulance and Fire Service) have now been granted planning permission.

7.19 In terms of employment uses, negotiations are at an advanced stage with a potential occupier for much of the 8.83 ha of employment land which remains here. If this proposal proceeds it will comprise an initial development of some 4,000 sqm of B1 premises, accommodating 500 staff (potentially increasing to 1,000 staff in time).

Future transport improvements will include a new spine road and roundabout junction on Ruthin Road adjoining the A483 junction. The Ruabon Business Park proposal, if developed, will involve further highway changes around Ruabon Road.

Flintshire County Council

7.20 In discussions, FCC regeneration officers highlighted the importance of the manufacturing sector to Flintshire's (and Wrexham's) economy. Over a third of all local businesses are in manufacturing sectors, including a range of high value and specialist manufacturing firms such as Airbus and Toyota.

7.21 Demand for manufacturing space remains high in eastern Flintshire, in 2013 some 70,000 sqm of industrial floorspace was taken up around Deeside, and the level of industrial property enquiries remains strong in 2014. Currently, some 45 percent of enquiries received by the Council are successfully 'converted' into the take-up of land and premises by the enquiring business.

Deeside

7.22 Originally intended to be a 'Growth Zone', Deeside will now operate as an Enterprise Zone to March 2016. Development here is projected to generate some 1,200 net new jobs, more than the other six Welsh Enterprise Zones combined. Development will initially focus on the 98 ha Land to North West of Garden City Site (UDP Site EM1.12), referred to as the Northern Gateway. Flood prevention works will start here in summer 2014, followed by the development of highways infrastructure starting in 2015. This will be the largest private sector-led development in North Wales and the North West of England. The area also has access to £70 million in Enhanced Capital Allowances to support appropriate investment and bridge any development funding gaps.

7.23 There is already interest from one large, Chester based business for land and premises here and the rapid take-up of other land is expected. The Deeside Enterprise Zone previously attracted three other large enquiries, all from firms looking for sites of more than 40 ha, although the lack of available infrastructure and services at that point in time ultimately prevented those from being taken forward. As noted above, this will begin to be addressed in 2015.

7.24 Development will also focus on the Deeside Technology and Skills Park centred on

an Advanced Manufacturing Centre (AMC). Recently approved by the Welsh Government, the AMC will provide facilities for the commercialisation of new technologies, and developing the engineers and technicians needed to apply them. The Centre will help to establish a cluster of supply chain businesses supporting major companies within the Zone. It will also provide a location for an Engineering Faculty (a Deeside College outreach facility), an Advanced Composites Centre and potentially, a Deeside High Performance Computing Centre. Later phases of the Deeside Technology and Skills Park will provide a student village and hotel as well as a business incubation centre, including conference facilities.

Broughton

7.25 Hawarden Business Park is growing as a 'supplier village' for Airbus and has been selected by a number of aerospace companies including Gardner, Aerotech and Tarvin Precision as a strategic location on which to grow and expand. The Business Park is also home to an Advanced Composites Research Training and Development Centre providing hands on experience in composites manufacturing, development and research.

Mold

7.26 Mold has proved an attractive location for businesses such as West Coast Energy (now part of EDF Energy). It functions as a centre for service sector businesses in the County, including a range of micro and small businesses in the town's large rural hinterland. Mold is also a retail centre for Flintshire and there is demand for further retail units within the main business parks and industrial estates of the town.

7.27 Regeneration officers expressed concerns that some of the larger manufacturing businesses in Mold, including Jeyes Fluid and Tiger Tim, may be looking to reduce their local operations and relocate at least some facilities.

7.28 Future demand in Mold is therefore likely to be for office (and retail) premises. There will continue to be need for industrial premises for higher value manufacturing operations but it will be at a small scale compared to Deeside.

Flint/Flint Coast

7.29 Flint town has a smaller scale and more locally based economy than Deeside or Mold. However, a number of larger businesses are based in the town, which has a

historic focus on the production of pharmaceuticals, food and paper products, including Kimberley Clark and SCA. Flint has seen little major investment in recent years but local demand remains healthy and vacant units usually let quickly.

7.30 Further north Greenfield Business Park is dominated by three large businesses – Kingspan, Westbridge Furniture and Safill Automotive. Both Kingspan and Westbridge Furniture have seen significant growth in recent years. The Port of Mostyn is discussed separately below.

Community/Town Councils

7.31 All the community and town councils in the study area have been contacted. Many have not responded with any issues with respect to the economy or the employment land and property market. Those that have commented are based within Wrexham and provide commentary for their respective boundaries only.

7.32 Cefn Mawr Community Council suggest that small units for new businesses could be accommodated at the former Flexsys site whilst the existing Ebenezer Glass House, Crane Street could provide office and business uses.

7.33 Gresford Community Council recommend two locations within the community to be included in the ELR, namely:

- The site of the former Antique Shop at 7 Chester Road, Gresford, Wrexham
- Allington Hall, Vicarage Lane, Gresford, Wrexham.

7.34 Llay Community Council expressed concerns regarding the Sharps' buildings, a large proportion of which will become vacant following the dramatic reduction in the workforce. The Community Council are particularly concerned about the loss of jobs and would wish to see employers attracted to the area to try and replace/increase work opportunities to Llay.

Education and Health Providers

Glyndwr University

7.35 Glyndwr University accommodates 8,000 students in Wrexham/Flintshire (and a further 2,000 in a London college aimed at international students). It operates from six sites within the study area:

- *Plas Coch Campus, Wrexham:* Glyndwr's main facility, the University is looking to consolidate its Wrexham teaching activities here. However, much of the campus comprises older, single storey stone buildings which no longer meet modern requirements. Glyndwr is currently drafting an Estate Strategy, with proposals likely to include the redevelopment of the north and south stands of the Racecourse Stadium (which the University owns) for academic facilities and possibly a business incubation centre, modelled on the St Asaph OpTIC centre (see below). The incubation centre would offer space both to student start-ups and other new businesses. The Stadium would still accommodate Wrexham FC football games 26 days a year. However, any scheme would be dependent on funding from the land and property sales discussed below
- *Regent Street (College of Art), Wrexham:* Identified as a possible future disposal, with art courses consolidated into Plas Coch. Art and Design is a key course for the University which has previously generated business spin offs and start ups. Principals House, 29 Regent Street previously provided studio space for art graduates but is now being refurbished as a 'Confucius Centre' for Chinese-English co-operation in education, trade and culture
- *Bath Road/Clwyd House, Wrexham:* Two student residential properties, identified as possible future disposals
- *Land at Dean Road, Wrexham:* Undeveloped land which Glyndwr would like to sell to a housing developer. The land was put forward as a housing candidate site for the previous LDP and is now being put forward in the LDP currently being prepared
- *Gatewen Site, Gatewen (Wrexham County Borough):* Also put forward as a housing candidate site for the previous LDP, and now being put forward in the LDP currently being prepared. Although it is in an edge of settlement location, Glyndwr argue that recent development has brought it within the urban area and makes it suitable for residential development
- *Northop Campus, Flintshire:* This site is split between Glyndwr University and Coleg Cambria (formerly Deeside College). Glyndwr owned land houses a centre for horticultural and land based courses. The University also owns a large parcel of greenfield land here, extending across the A55. It would like to develop some of this land for additional lab space, residences and car parking. However, this would be subject to achieving capital receipts from land sales elsewhere.

7.36 In Denbighshire, Glyndwr own the OpTIC Centre at St Asaph Business Park. This is a research and development centre for precision polishing, micro-structured patterned drums, precision engineering design services and photovoltaics. It operates as an incubation centre for businesses looking to develop technology for commercial purposes and also provides conference facilities. The Incubation Centre comprises 25 units, each around 200 sqm in size. It is presently 95 percent occupied with space for a Phase II development.

7.37 Glyndwr maintains strong links with major businesses in North East Wales, including JCB and Airbus. In addition to supporting apprenticeships and placements with these businesses, the University has a growing role in facilitating joint research projects ('Knowledge Transfer Partnerships') to meet specific research and development requirements.

Coleg Cambria

7.38 With 27,000 full and part time students on seven sites across Wrexham, Flintshire and Denbighshire, Coleg Cambria is one of the UK's largest further education colleges and the biggest vocational training partner in North East Wales. A large proportion of the students are on day-release vocational courses, linked to local employers. Others work in the on-campus commercial outlets including a newsagents, hairdressers and travel agents.

7.39 Facilities include a dedicated training centre for Airbus, Broughton (located at Unit 5, Hawarden Industrial Park). Operated in partnership with Glyndwr University, the training centre has an annual throughput of 200 students accommodating both HNC/degree level trainees and research students with specialisms in new technologies and composite materials.

7.40 The college currently has three facilities in Wrexham town – Grove Park, Bersham Road and the Wrexham Training Centre, Ruabon Road (both former Yale College sites). Coleg Cambria is also in negotiations with WCBC (now completed) to buy the former Groves High School site adjacent to Grove Park. Once refurbished this would accommodate (amongst other uses) the college's hairdressing courses, currently run from the Wrexham Training Centre (which could then be disposed of). Facilities in Flintshire include the Deeside Campus at Connah's Quay and the Northop

agricultural/horticultural Campus (former Deeside College sites).

7.41 Coleg Cambria has a ten year estates plan which would see some £75 million invested in refurbishing and expanding its operations. This will include some £7.5 million in new and refurbished development at Bersham Road.

Betsi Cadwaladr University Health Board (North Wales NHS)

7.42 Betsi Cadwaladr University Health Board confirmed that an updated Site Development Plan is being prepared for Wrexham Maelor Hospital. This will see some growth within the existing hospital site but does not envisage the release of any hospital land for other uses.

7.43 To the south of the Hospital, 3.17 ha of undeveloped land which is owned by the University Health Board recently received full planning consent for a 3,600 sqm joint Ambulance and Fire Service Joint Resource Centre. The building will house eight fire appliance vehicles and six ambulances along with associated maintenance facilities, offices, store rooms, crew rest rooms and training facilities. Assuming full government support, the Centre will be completed by the end of 2015. The new emergency service centre will replace the existing fire station at Bradley Road in Wrexham, and the existing ambulance stations in Chirk and Wrexham. At least some of these existing properties will be disposed of although there is no timetable for this.

7.44 There are no significant plans for change at the community hospitals in Chirk, Deeside, Holywell, Mold or Penley, beyond some consolidation and/or relocation of certain medical services. In terms of other medical facilities, the most significant new development planned for the next few years will be the £2.5 million Caia Park Primary Care Resource Centre in Wrexham. Funded by Primary Health Properties, the Resource Centre will provide a range of community health services, with delivery expected by the end of 2014.

7.45 The University Health Board has no other land or property requirements at this time.

Key Businesses/Landowners

7.46 One to one consultations have taken place with several major businesses located in Wrexham and Flintshire. Many are national or international businesses, with facilities in the study area being part of a wider network of research and development,

production, service and logistics operations.

Flintshire Businesses/Landowners

Airbus

7.47 Airbus employs 6,000 at its 300 ha wing manufacturing plant at Broughton. This is felt to be the peak employment rate at this plant and future employment is unlikely to grow beyond that level.

7.48 Over the past 15 years Airbus has invested some £2 billion (approx.) in new facilities at Broughton including the West Factory (A380 wing manufacture), North Factory (A350 wing manufacture, completed in 2011), Stringer Manufacturing Plant, A380 Skin Milling Extension and Creep Forming Extension. Airbus has also developed a new north entrance to the plant which offers improved site access for staff and HGVs.

7.49 Thus most of the major investment Airbus requires has occurred. Future growth will be on a smaller scale and is expected to include the redevelopment of older brick and prefab industrial premises adjacent to the main entrance to provide new pre production facilities which could accommodate (as yet unspecified) technological advances in production. A small expansion site also exists between the north entrance and the A380 Skin Milling Extension. This will be retained to accommodate future manufacturing requirements.

7.50 Most other undeveloped land within the facility is accounted for by the runway and associated curtilage. As Airbus Broughton will continue to export most of its manufactured products by air the runway remains a key part of the site. The present runway accommodates the Beluga transport aircraft but it may need to be lengthened when Airbus replaces this with a new type of heavy transporter aircraft. Land is available within the Airbus site for this.

7.51 A380 Wings are transported along the B5129, north to an Airbus owned launching point on the Dee, and then by barge to the Port of Mostyn where they are transferred to Ro-Ro Ferry. There are no plans to change this arrangement. However, Airbus is looking to save money by transporting more components by road.

7.52 Airbus Broughton also used to produce the wings and bodies of executive jets, for US manufacturer Hawker Beechcraft. However, Hawker filed for bankruptcy in 2012 and that production line ended. Many of the former executive jet facilities in the north east of the site are now occupied by Marshalls (a separate company) which maintains and repairs existing jets.

7.53 Airbus has a large local supply chain, extending across Cheshire, Merseyside, Wrexham and Flintshire. However, Airbus would also like to see the adjacent employment areas developed as 'Supplier Villages'. These include the St Modwen owned site, north west of Airbus (off the B5129) which accommodates a number of smaller companies including Hawarden Air Services. Further development land is available here.

7.54 To the south west is Hawarden Industrial Park, which already accommodates some suppliers including Electroimpact and Gardner Aerospace. Other suppliers, including Tresco, have requirements for land and property here.

7.55 Airbus reports no issues with recruitment. The company has a broad catchment area for staff – extending from Conwy in the west to Merseyside. It also links to both Coleg Cambria and Glyndwr University for apprenticeship and graduate schemes.

BASF Coatings

7.56 The Industrial Coatings and Refinish Division of BASF Coatings Ltd is based at Deeside Industrial Park. Here they manufacture a variety of products for protective coatings for steel and aluminium, used primarily in the construction industry. They provide specialised paint in 1 ton containers, which is then baked onto a coil of steel.

7.57 The Deeside division is the sole BASF facility in North Wales. Major sites are located at Paisley (Scotland), Bradford and Grimsby, with a smaller site in Manchester and a business centre in Cheadle. BASF has announced its intention to close the Paisley, site by the second half of 2015. There is no opportunity to consolidate the Scottish and Welsh site, due to the difference and incompatibility in their operations

7.58 The company currently employ 52 FTE rising to circa 100 FTE to incorporate employees involved within the sales department. Whilst the majority of employees are based locally, there are a number which commute from Ellesmere Port, Connah's

Quay and Flint. There are also two employees from Chester, and the furthest employee is from Blackburn.

7.59 Recruitment is undertaken by the company's HR department, as well as through specialist recruitment agencies. Since 2008, the shop floor has been operating with ten percent of its staff employed through a recruitment agent. Conversion from agency staff to a permanent employee of the company has occurred as and when positions arise. In January 2014, BASF recruited four new agency staff at their Deeside branch, which reduced from a total of 80 applicants. Although the company continue to use recruitment agencies, they feel calibre of agency staff has reduced over the years.

7.60 The company lease transferred from Easter Group to Canmoor following the administration of the former company. Prior to the lease expiry in September 2017, there will a mid-strategic review with BASF's company headquarters in Germany to ascertain the future of the Deeside branch i.e. a lease renewal or relocation. There are no issues as to why the company would not renew the current lease in some form.

7.61 BASF pay a peppercorn rent on the land adjacent to their property which grants them first refusal of proposals. They have previously considered developing a unit on this parcel of land, but this has not materialised. They have also in the past, had the opportunity to buy the freehold of the property, but this did not actuate.

7.62 In terms of the company's factory and production systems there are no capacity issues. They currently operate a two shift system, and can run a three shift system. Articulated vehicular traffic comprises between 4-10 movements a day. The company has looked at introducing a one-way system to provide separate visitor access to the front and preliminary approaches has been made with FCC.

7.63 Their largest customer is TATA at Deeside who receive 80 percent of the division's trade, with the remaining 20 percent exported. TATA has had a successful 18 months, and have made significant investments going forward. As a result BASF's business performance is strong, with next year's projected forecast set to continue this trend.

7.64 BASF has two major competitors in the market, one of which has recently retrenched from Blackburn back to Sweden, and the other based in Liverpool.

7.65 Deeside Industrial Park benefits from good broadband levels, a bus service which is utilised by staff at BASF, and there are no security concerns. A minor issue has been raised with estate management with regards to improving the visibility of the board signage of their respective estate at Tenth Avenue.

Convatec

7.66 Global medical production company, Convatec, has been based at Deeside for approximately 30 years. They distribute their medical products and technologies to nearly all countries, worldwide. In the main, their raw material comes from the UK and Europe.

7.67 At Deeside, the company operate from four buildings which are a hybrid of industrial and office uses. Three of these building are owned, with the lease of the remaining property expiring in 2019.

7.68 There are approximately 450 FTE and 10 PTE staff employed on-site. 80 percent of employees are locally based. Approximately, half of the employees commute by private vehicle and the majority of these operate a shared car system. The premises have substantial car parking for the staff numbers. There are no issues with staff recruitment. Convatec has previously undertaken apprenticeship schemes, but are currently not part of any.

7.69 The company are very satisfied with the current accommodation and would not relocate from their existing site. Although there is no expansion land or premises available on the existing site, company growth can still be accommodated. There are no issues with superfast broadband; logistical and distribution chains; or, supply chain links. Convatec premises and associated road network are well maintained, however concerns are raised with the wider estate. A large number of wagons are parked on the side of the roads causing problems to the wider network. The company feel the estate could be better maintained as there are problems with refuse. The bus service, which is scarcely used by Convatec employees, is a dangerous service with no designated route stops. A new unit in close proximity to the Convatec establishment has no path leading into the site, forcing staff to walk on

the local road network. There are also issues with estate lighting.

Knauf Insulation

7.70 Knauf's sole rock mineral wool plant is based off Chemistry Lane, Queensferry. The company employ circa 94 FTE staff at this site, with a further 200 FTE employees at the glass mineral wool plant in Cwmbran, South Wales. The main headquarters for the UK based sites is located at St Helens, with further operations in Hartlepool. The insulation division comprises a €1.2 billion turnover, amongst a total global turnover of €6 billion. The company supply to Homebase, B&Q and Wickes. They export half their produce to Western Europe including Scandinavia, with the remainder distributed to the UK and Ireland.

7.71 The 6.6 ha Queensferry site has been in operation since the 1950s and now operates a 24/7 service, closing only twice a year. The western half of the site comprises industrial units for the single production line, with the eastern section comprising internal and external storage units and office space.

7.72 The site is constrained in all directions by built development. The southern edge is bounded by a permitted gypsy and traveller caravan site as well Queensferry Industrial Estate which extends to the eastern boundary. Chemistry Lane bounds the western border, whilst a railway line borders the northern edge. There is no scope, therefore to expand the site beyond the existing boundary. The company foresee growth accommodated within the site boundary for at least another 3-5 years.

7.73 The company's main issue is access into and out of the site. Chemistry Lane, an otherwise poor quality residential road, is the sole access into the site. Parked alongside this road are the cars of the residential houses which line Chemistry Lane. With 15-18 lorries delivering raw materials and 35 lorries dispatching insulation on a daily basis, logistics continues to be a problem. Though there is a further access point to the north, this is solely for emergency services.

7.74 The majority of the Knauf team comprises semi-skilled workers, with 65-70 in the operative department. The remaining employees are within the technical and managerial department. In 1987 the company undertook a recruitment initiative, and the majority of the employees recruited as a result are still with the company now. Staff retention therefore is high. In the past three years however, circa 10 percent of

the staff have effectively retired. To deal with this ageing employee population, the company has embarked on an apprenticeship scheme with Coleg Cambria, and are hoping to replace staff looking to retire in the coming years. There are issues with recruiting staff within the technical department, and recruitment for managerial positions has proven difficult. For example, the company has recently recruited a quality manager and a technical manager. The recruitment agency initially recommended approximately 40 people for each position, but none of these met the company standards or their expectations.

7.75 In 2013, Knauf Insulation was notified of two planning applications in close proximity to their site. One was for a change of use of an industrial unit to a climbing centre. The other application was a residential development comprising flats and apartments. Knauf objected to the latter application on the grounds that it would compromise the existing access route to the north, due to the associated number of cars parked. Whilst the former application was approved, the latter has been refused.

Kingspan

7.76 Originally founded in Ireland, Kingspan now operates manufacturing sites and sales offices across 48 countries. The Holywell site in Flintshire is part of the Kingspan insulated panels division, the largest division of the Kingspan Group equating to 58 percent of the total turnover. Key markets include Central and Eastern Europe, as well as the Middle East. The Welsh site produces a range of insulated, composite panels for roof and wall applications.

7.77 The site at Flintshire was established in 1994 as a result of the attraction of a wide geographic market through the Manchester and Liverpool conurbation. Funding through the WDA was also readily available and accessible

7.78 Elongated buildings occupy the site at Holywell, reflecting the linear processes undertaken to manufacture the insulated panels. Kingspan occupies an area of approximately 15 ha. The company are currently at 60 percent capacity and can, if necessary, expand within the existing footprint of the buildings. However, expansion outside of the existing premises is constrained in all directions. The coastal path, adjacent to the Dee Estuary marks the eastern edge of the boundary, the railway line forms its western boundary, the access road to the Greenfield Recycling Centre to

the south and the Greenfield Docks upon the northern boundary. Localised flooding problems affect the lorry park in the north of the site and the storage for pallets at the end of the factory in the south of the site, including parts of the Kingspan premises. Discussions are being pursued with FCC to overcome the flood problems.

7.79 There are approximately 300 FTE on-site and field based staff. The majority of these are locally based from areas within Flintshire, and a small number also commute from the Cheshire and Merseyside area. Staff recruitment has been an issue for the company, especially within the technical positions. As an example, a recruitment initiative between March and May 2014 to hire two plant engineers for the Flintshire site was unsuccessful.

The Port of Mostyn

7.80 The Port of Mostyn is a privately owned and operated port located in the outer estuary of the River Dee. It is a Statutory Harbour Authority and also the Statutory Pilotage Authority for navigation in the estuary. The Port extends to some 50 ha, with a large facility for Warwick International to the south. Existing facilities include a 310 metre riverside quay (with 24 ha of adjacent land) and a 180 metre Ro-Ro berth (with 6 ha of adjacent paved land).

7.81 The bulk of the Port area comprises open land which is let out to a number of wind energy providers, notably Vestas and N Power, for the assembly and shipment of offshore wind turbines. An early centre for offshore wind energy The Port of Mostyn is now the primary shipping port for the assembly of offshore wind farms in the Irish Sea. As of April 2014 this included assembly of the world's second largest offshore wind farm, the 160 turbine Gwynt y Môr facility which will, when complete, generate 576 MW of electricity from wind energy, enough to power approximately 400,000 homes. The Port of Mostyn also provides Ro-Ro transhipment facilities for the movement of Airbus A380 wings from Dee barges (shipped from Broughton) to larger ocean-going ships.

7.82 The Port employs 450 at peak times (i.e. when an offshore wind farm is being assembled), dropping to 200 at other times. As some 85 percent of goods moving through the Port are shipped in, and out, by sea the HGV traffic generated is modest.

7.83 Offshore wind energy is a growing business sector, with both the size of offshore

schemes and the size of individual turbines increasing. Despite growing competition from other ports (notably Birkenhead) The Port of Mostyn is confident it can maintain its position as the primary Irish Sea port facility for offshore wind energy schemes and is seeking to grow the facilities it provides to this sector. The Port is currently applying to Natural Resources Wales to develop further berths along its water frontage.

7.84 The Port also has the long term aspiration to develop some 12-16 ha of land to the north for a renewable energy manufacturing (and energy generation) park. This would, amongst other things, link turbine manufacture directly to the port facilities. However, this would be subject to the identification of demand from renewable energy businesses. Also, the land in question sits within the Dee Estuary RAMSAR/SPA protected area, so a strong case would have to be made for the need for any development.

Tata Steel

7.85 The Tata Steel site manufactures pre-finished steel for the building envelope, domestic appliances and manufactured goods market. The site occupies 405 ha of land with every building at full capacity. The site comprises four main production facilities and a number of ancillary units including a laboratory. The processing element is not at full capacity and business functions could grow by utilising the existing machines fully. This would require recruitment of a further 60 people.

7.86 The steelworks site currently employs circa 950 FTE employees, comprising 500 FTE at the main steel works operations, 250 FTE in its on-site sister companies; and, 200 contractors that cross over between the two. The employee catchment extends from the Isle of Anglesey to Liverpool.

7.87 Whilst a strong foundation training scheme is established at Tata, their immediate issue is retaining staff after the skills have been developed. For example, the company are competing with the likes of neighbouring companies such as Airbus and sister company Jaguar, who pay higher salaries for similar roles. Their second recruitment issue is the ageing workforce. The average blue collar worker at the site is around 50-54 years of age and by 2024 the site will lose approximately 40 percent of its existing staff due to retirement. To bridge this gap, the company is looking to recruit 140 people. Half of these will be recruited in-house and half will be through

apprenticeship schemes that will align with a number of education bodies including Glyndwr University, TTE Training in Ellesmere Port and local schools and colleges.

7.88 The raw material for their manufacturing processes comes from a number of areas:

- Steel is transported from South Wales by rail freight
- There are two main suppliers for their paint located at Deeside Industrial Estate (BASF Coatings) and Speke
- Zinc is imported from Europe.

7.89 Half of the facility's products are supplied to the UK including a cluster in South Wales centred on Cardiff. The remainder is exported to Europe, including areas as far as Russia and Scandinavia.

7.90 Tata has gained planning permission to construct a Combined Heat and Power Plant (CHPP) on a 1.7 ha site within their landholdings. A number of parties have expressed interest into developing the CHPP. TATA will vet the interested parties to ensure delivery of the CHPP is realistic and viable, as initial costings show an investment of circa £35 million will be required.

Toyota

7.91 Toyota located to Deeside in 1989, creating an engine plant to serve the Derby Tier I car plant. Government grants were a big factor in the decision to locate here. It was the first time globally that the two linked plants were built in separate locations. Access to Derby was not considered an issue, and the communications and export potential of the Deeside location was a factor.

7.92 The area has a good workforce and a skills base as it is an established manufacturing area. 610 people are employed at present. At its peak, before 2008, Toyota employed 850, and produced 250,000 engine units per year. Over the next 2-3 years it is envisaged that production will step up again. Employees come from Mersey/Dee area, North Wales and Chester. However, Toyota is seen as a good employer and people will travel long distances to work there. The turnover of staff is low.

7.93 65 per cent of the engines produced go to Derby with the rest exported internationally to Turkey, South Africa and Brazil. The product goes by ship, via the local docks.

7.94 The company have a large area of undeveloped land adjacent, large enough to build a further two plants. The Japanese owners would not sell this, unless it was to accommodate another Japanese company. For example Hitachi Rail recently looked at the site.

7.95 The supply chain into Toyota is complex, with many of the parts coming from Europe. At present they have no Welsh parts suppliers at all, something that Toyota would like to see change.

Wrexham Businesses/Landowners

Avox

7.96 Avox are part of DTCC, a US company that undertakes credit research for global banks and corporate clients. This is an internet service, and is a growing area of business as banks face increased regulatory pressure to maintain data.

7.97 The company are located at offices in Wrexham Industrial Estate. They started off 10 years ago employing four people, now they employ 220. Announcements have been made to double the company in the next 18 months. The expansion will be accommodated at the current location. Overheads are low, and up until now, the lease has been short term and flexible, but the company want a longer more secure term as they invest in the property. WCBC is the landlord and is accommodating this requirement.

7.98 Avox is very happy with its current location. The local demographics are good for the employee pool that they want – young, computer literate staff at an average age of 25 years. 90 per cent of its staff live within a 5-10 mile radius, and many rely on the public transport links. Professional finance staff will travel further, but again this is not a problem as Chester and Warrington have a good pool of well trained individuals.

Kingmoor Park Properties

7.99 Kingmoor Park Properties own the 32.2 ha E3 UDP Single User Site at Wrexham Industrial Estate. The current planning and development status of this site is discussed in detail in Section 6.0 and Appendix 4. However, speaking through its agents HOW Planning, Kingmoor Park emphasised that it would wish to see the

entire site (both northern and southern parcels) identified as a candidate site for allocation in the new LDP and included within the boundary .of Wrexham Industrial Estate.

7.100 This reflects the fact that the site benefits from planning permission for some 94,000 sqm of warehouse development and is felt to be acceptable in technical, landscape and ecological terms.

Kronospan

7.101 Kronospan is the world's largest manufacturer of wood panel products and laminate flooring. The company operate from a fully utilised 44 ha site in Chirk – their sole facility in the UK. On this site there are ten main processing units, all part of a single network to form one industrial estate. The facility operates a 24/7 hour week.

7.102 Kronospan was initially built as a two bay factory with a potential forecast to employ 100 employees. They located to the site in Chirk as there was an existing coal mine and a willing and available workforce. At the time of establishment, the company proposed developing a northern access road. This, however, was opposed and instead the company has invested in developing a suitable road and logistics network to arrive from the residential route through Chirk.

7.103 They employ 600 FTE, 95 percent of which are locally based. An apprenticeship scheme has been operating since 2002, and currently they have 50 apprentices. Recruiting employees with key skills has been an issue for the company.

7.104 The site is limited in capacity due to surrounding Green Barrier to the west and north. The farmland to the north lies beyond the development boundary and is owned by Kronospan. This area, whilst contrary to planning, would be a logical extension to the current industrial operations. If however, the northern parcel of land was not released in the future, the company have stated their business operations would be constrained. If they were to relocate they would look to occupy a site which is four times larger than their existing site. Kronospan are not looking to relocate within the next 12 months or within the next 2-5 years.

7.105 Whilst the company operate from a major industrial site, it is located adjacent to the Western Village of Chirk to the east, and lies in close proximity to the Pontcysyllte

Aqueduct and Canal World Heritage Site.

7.106 They have a national customer base focused along the M62 and Merseyside area. A small element is also exported. The supply chain links are managed in-house and is fit-for-purpose. There are no issues with the local or wider logistics network.

7.107 Apart from potential expansion constraint, the main threat to the company comes from the biomass sector, which would deplete their raw material stock and affect supply chain links. As part of the national renewable energy development, the company would want to see other forms of energy generation to be delivered.

JCB

7.108 JCB established at Wrexham Industrial Estate over 30 years ago, as a result of concentrating factories where resources were easily available i.e. across North East Wales and England. Here, the company produces components for the end machine.

7.109 The total sites spans 21.6 ha and incorporates three premises totalling 49,109 sqm. This includes:

- The axle facility – 20,903 sqm
- The transmissions facility – 21,368 sqm
- The Drivetrain Systems facility – 6,838 sqm.

7.110 The company currently occupies 55 percent of its footprint, and also has the opportunity to expand to the west on land that they own. There is also a vacant bungalow under their ownership located to the east of their landholdings. This was previously a regional office for the now abolished Welsh Development Agency. Preliminary options for development for this building have included a training centre.

7.111 On site they employ 93 FTE employees with a further 296 FTE direct workers. There are also 71 FTE agency support workers. Three-quarters of the total staff number are within a 25 mile catchment area, with the furthest employees travelling from Manchester and Derby.

7.112 On average, there are 25 HGV movements a day. Apart from the feeder lanes which become congested during rush hour, there are no issues with the estate's logistical network. Noticeable comments raised by HGV drivers with the wider road networks

include the bottleneck experienced at the A494 at Aston Hill, near Queensferry. They have recently received requests for logistical and storage support from smaller companies within the Estate. This has included companies looking to lease space from the company.

7.113 Whilst there is an approximate split of produce supplied between the UK and overseas market, the business is less reliant on the UK market. Instead, the company is subject to global pressures. 90 percent of the components are supplied to JCB sister facilities. 10 percent are supplied to Original Equipment Manufacturers mainly based within North America.

7.114 JCB has announced plans to invest £150 million to expand its operations in Staffordshire and create an additional 2,500 jobs by 2018. The projected growth in machine production from Staffordshire factories will be supported by an increase in manufacture of components from factories elsewhere in the UK, including axles and gearboxes from the Wrexham plant.

Sharp Electronics

7.115 Sharp have been in Llay Industrial Estate, Wrexham since 1984 when the plant was set up to manufacture a range of electronic goods. Initially, this was videos and microwaves, but was later expanded to include solar panels, and DVD players. However today, they just produce microwaves at Llay. As a result plant operations have shrunk and only part of the complex is in use.

7.116 There are currently 126 people employed at the plant. This reduced by 256 full time staff in February 2014 (as well as around 400 agency staff). This is part of the cyclical nature of the electronics industry as products come and go, and as manufacturing has moved overseas. Sharp have plants in Poland, France, the US and Far East to accommodate relocated operations

7.117 If new products come along the plant will be retooled and space brought back into uses, thus no part of the property can be sold off or sub-let. Sharp do not see a problem in re-employing the staff if that happens. Warehousing and distribution is outsourced to a contracting company

7.118 The Sharp Precision site, to the south, has now been sold to North Wales Police (see

Section 6.0). Sharp did have some recycling functions here but these closed some time ago.

Neighbouring Areas

7.119 PPW, 7th Edition (2014) highlights the importance of collaborative working between local planning authorities on issues of a strategic nature. Paragraph 7.1.5 states that: *"Effective planning for the economy requires local planning authorities to work strategically and co-operatively steering development and investment to the most efficient and most sustainable locations, regardless of which local authority area they are in. In addition…it is essential that local planning authorities identify and make adequate provision for their role in the regional and sub-regional economies of Wales."* The need for joint working is echoed in the other key Welsh planning policy documents, including the TAN 23 guidance note on economic development.

7.120 Wrexham and Flintshire sit within a group of Authorities that make up the North Wales sub region. Denbighshire borders both Wrexham's and Flintshire western border. Further west are the authorities of Conwy, Gwynedd and the Isle of Anglesey. Powys also shares a short boundary to the south west of Wrexham. Cross border links are important and a number of English Authorities fall within the Mersey Dee economy including Wirral and Cheshire West and Chester. Shropshire also shares a border with the southern boundary of Wrexham.

Welsh Authorities

Conwy County Borough Council

7.121 Conwy's LDP was adopted in 2013 and covers the period 2007-2022. The Plan recognises cross-boundary issues of neighbouring authority areas, especially those locations strategically positioned along the A55 corridor. This includes St Asaph Business Park and the new employment land allocation at Bodelwyddan in Denbighshire, as well as Parc Menai and the Bryn Cegin estates in Gwynedd.

7.122 To reduce out-commuting level, meet predicted population changes and promote a holistic growth strategy, the LDP promotes 36 ha of employment land which also includes new allocations.

7.123 Policy EMP/1 of the LDP sets out the basis for Conwy's future employment land allocation. It makes provision for 20.5 ha of employment land, with a further

contingency level of up to 2.0 ha to meet the population predictions over the Plan period. The Urban Development Strategy Area comprising the strategic hub of Conwy, Llandudno Junction, Colwyn Bay and Abergele will be utilised in meeting 85 percent of this need. The remaining 15 percent is identified within the Rural Development Strategy Area settlements, including the Tier 1 Main Village of Dwgyfylchi and the Tier 2 Main Villages of Dolgarrog, Llansannan and Llangernyw.

7.124 To contribute to the objective of reducing out-commuting levels, a further 15.5 hectares of employment land, with an additional contingency of 1.5 ha has been made. 100 percent of this land is within the Urban Development Strategy Area.

7.125 A greater emphasis is placed on higher value employment opportunities and skills development which is hoped to contribute to a more balanced age structure. The LDP allocates a greater demand and shift towards B1 and B8 Uses in the short to medium terms and B2 Use in the longer term.

7.126 Located along the A55, Abergele is the key growth area in the East to meet development needs. 5.7 ha of new employment land will be delivered here to meet needs and contribute to a reduction in out-commuting levels and car usage. A Masterplan will form the delivery vehicle to provide a comprehensive development opportunity. Llandudno Junction is also emerging as an important location for office growth and business-led investment. Through the Llandudno Junction Masterplan (2009), 5.6 ha of employment land will be delivered at this strategic economic hub location.

7.127 Discussions with Council officers indicate that there is no appetite to voluntarily merge with Denbighshire, following the recommendations of the Williams Commission. The links between the two authorities, specifically between jobs, logistics and the supply chain are considered small.

Denbighshire County Council

7.128 Denbighshire County Council adopted the LDP (2006-2021) in June 2013. The LDP allocates 59.5 ha of employment land, the majority of which is to the north of the County.

7.129 Bodelwyddan has been identified as a Key Strategic Site to deliver 1,715 new

dwellings including affordable housing, 26 ha of employment land, education and health provision, infrastructure improvements, open space and community facilities. At the time of writing, the Development Brief for Bodelwyddan was out for public consultation, and will subsequently be followed by a detailed masterplan. The development is expected to provide:

- Micro office units for new start up businesses to attract and retain companies in Denbighshire
- Self contained offices to facilitate businesses growth
- Hi tech/workshop/warehouse units with high ancillary office content to attract high tech companies
- Warehousing/B8 uses.

7.130 An outline planning application submitted by landowners, Barwood Land and Estates is anticipated to be presented to the Council Planning Committee, no earlier than 30th July 2014. The Development Brief will be required to be adopted before a decision is made on the planning application.

7.131 A Strategic Employment site has also been identified on 14 ha of land at St Asaph Business Park. Sufficient provision for B8 uses on other allocated sites, including at the nearby Bodelwyddan site, results in St Asaph being generally restricted to B1 use, with B2 and waste management uses also permitted on part of the site.

7.132 Other allocations include an 8 ha extension to Colomendy Industrial Estate (Denbigh), a 6.0 ha at Ty'n Llidiart (Corwen) and a new allocation at Lon Parcwr (Ruthin) amounting to a 5.5 ha extension to the industrial estate.

7.133 Denbighshire County Council recognises cross border linkages with adjacent authorities have the potential to impact on the County. Whilst commuting occurs between Denbighshire and Flintshire, Council officers have indicated that the extensive distance between their respective employment areas weakens economic links.

Gwynedd Council and the Isle of Anglesey County Council

7.134 Gwynedd Council and the Isle of Anglesey County Council are working together to prepare a Joint LDP that covers Anglesey and Gwynedd (excluding Snowdonia National Park). The Councils are presently undertaking the first consultation on the

Joint LDP – Preferred Strategy which details strategic policies only. A second consultation draft is expected to be published by early 2015, which will consult on detailed planning policies and final adoption of the Joint LDP by April 2016.

7.135 Of particular relevance, a site near Wylfa nuclear power station in the north of Anglesey has been identified by the UK Government in the National Policy Statements as a site for a new nuclear power station. No data is available at the moment about the numbers that will be travelling to work in the new Wylfa. One assumption is that – of the 6,000 jobs, it is anticipated that 1,815 (30 percent) will be held by people who live in the 90 minutes travel-to-work catchment area. The remaining 4,185 (70 percent) of the jobs will be undertaken by people who will need temporary or permanent accommodation in 2018.

7.136 There are a further two Nationally Significant Infrastructure Projects which will affect the Plan area and includes the Rhiannon Wind Farm – an off-shore wind farm – and improvements/new National Grid Transmission Lines connecting the proposed new nuclear power station at Wylfa and the proposed Rhiannon Wind Farm with the Pentir and beyond.

7.137 Anglesey has been identified as the Anglesey Enterprise Zone, to focus on the energy sector, whilst the site of the former nuclear power station (which lies outside the Joint LDP area) in Trawsfynydd, Gwynedd, has been identified as a centre for the Snowdonia Enterprise Zone to focus on ITC and digital, enterprises, generating innovative low carbon energy and technology companies.

7.138 The 2011 Employment Land review reveals an excess of existing employment land that is unlikely to meet the requirements of modern business. The Employment Land Study for the Joint LDP area concludes that up to 6 ha of employment land should be provided per annum in Anglesey and Gwynedd up until 2026. This is equal to 84 ha each or 168 ha together, which includes a buffer which will provide an enhanced offer. New sites amounting to 5 ha are allocated for employment uses in or near to the Urban Service Centres of Pwllheli and Porthmadog in order to redress the current imbalance in the geographical spread of employment land within Gwynedd.

7.139 Links with Wrexham and Flintshire are focused on the A55/A5 Corridor which connects North East Wales to the key Port of Holyhead. Some 60 ha of employment

land is available, close to the A55 at Bangor, comprising the Bryn Cegin Estate, Llandygai and Llandygai Industrial Estate sites. This land has been available for almost 15 years but has attracted little interest.

Powys County Council

7.140 Having consulted on a Preferred Strategy LDP (2011-2026), Powys County Council is currently working on producing the Deposit Plan for public consultation in June 2014. Adoption of the LDP is planned for December 2015.

7.141 The Preferred Strategy applies to all of Powys except the Brecon Beacons National Park. It proposes that the LDP should provide 7,700 dwellings and 42 ha of employment land and that this should be distributed according to a hierarchy of settlements, with greater allocations directed to settlements in a proposed central growth corridor running north to south through the centre of Powys. At this stage the Preferred Strategy does not allocate individual sites for development.

7.142 With take-up rates between 2001 and 2011, at approximately 1 ha/year, the LDP only needs to identify 15 ha of employment land for the Plan period. Thus the currently undeveloped UDP employment land allocations (64.51 ha) represent an almost 65 year supply of employment land for the County.

7.143 The preferred allocation of 42 ha of employment land within the LDP will provide an element of flexibility to cater for any peaks and troughs. This figure is well below the available UDP employment land allocation supply figure of 64.51 ha and indicates there is little quantitative need to allocate additional new sites within the LDP. The breakdown of the employment land requirement identifies that the primary driver for new employment site allocations during the LDP Plan period is likely to be the need to replace and upgrade the existing supply of premises, rather than the provision of land to accommodate the expansion of the economy.

7.144 The high level of business start ups, self employment and micro and small businesses emphasises that employment growth within the County cannot be accommodated solely by allocated employment sites which cater primarily for larger scale employment development. Therefore, alongside the allocation of employment land to meet employment growth the LDP will also need a policy approach that facilitates home working and small scale employment development to support new

and existing businesses.

English Authorities

Cheshire West and Chester Council

7.145 Cheshire West and Chester's Local Plan (2010-2030), is divided into two parts. Part One provides strategic policies for the Borough, setting a target of 300 ha of employment land and 22,000 homes to be delivered by 2030. Part One went to Examination in Public in summer 2014. In relation to employment land the Inspector published his modifications report in September 2014, which increased the proposed land allocation to 365 ha. Part Two will provide Land Allocations and Detailed Policies and the Council is currently consulting on issues and options for this document.

7.146 In support of the Local Plan, an Employment Land Study Update (2013) has been produced to assess the supply and demand for employment land and premises in the Borough. This updates the 2009 Employment Land and Premises Study previously undertaken by BE Group.

7.147 Employment forecasts, provided through the Cheshire Halton and Warrington Econometric Model. This predicted growth of some 6,890 extra jobs between 2010 and 2025, an increase of 5.7 percent on the 2010 total of 121,360 jobs. This comparatively low rate of growth reflects a projected decline in manufacturing employment in the former Ellesmere Port and Vale Royal district areas, along with some ambiguity about the rates of employment growth in transportation and storage uses. This is low in terms of targets which include, for example, The Rural Regeneration Strategy which sees 3,800 jobs being created in the rural area over the next 20 years alone. Also the '*Altogether Better for Business: An economic growth strategy for West Cheshire'* that aspires to facilitate an additional 5,000 new jobs and £500m worth of private sector investment by 2018

7.148 The 2013 Update identified a net annual take up rate of 16ha/year over the period 1996-2012. Extended forward over the remaining Local Plan period this gives a land requirement of some 270-288 ha. Applying a 27 percent buffer to allow scope for churn and offer a range and choice of sites gives an increased total of 343-366 ha of land needed to 2030.

7.149 The Borough has been split into the five areas – Chester, Ellesmere Port, Northwich, Winsford and the rural area.

Chester

7.150 The 2013 Update Study identified a limited availability of land within Chester for future employment development. The Chester Business Quarter is identified as a broad location for a mixed use, employment led regeneration to the east of the City Centre. This will provide some 44,000 sqm of high quality office floorspace adjacent to Chester Railway Station. Most of this scheme is now consented and initial works have started on the scheme which will be delivered by developer Muse.

7.151 This scheme, along with development at Chester Business Park, will meet office needs in the City but the provision of further industrial land is constrained by Chester's tightly defined Green Belt boundaries. In particular, Green Belt policy restricts the growth of Chester West Industrial Estate, including areas of Sealand Road Industrial Estate (parts of which are within FCC's boundary).

7.152 The largest existing industrial allocation is the 25 ha Bumpers Lane site at Sealand. However, this former landfill site is contaminated and access is linked to the delivery of the Chester Western Relief Road, which is considered unlikely to come forward. This suggests that Bumpers Lane may be unviable.

7.153 It is therefore assumed that while Chester will remain a sub-regional office centre (and a net importer of workers from Flintshire) it may have to look to neighbouring Flintshire (and Ellesmere Port) to support further industrial growth.

Ellesmere Port

7.154 Sites are distributed around the Borough, but there is a particular concentration in Ellesmere Port. The focus for Ellesmere Port will be the delivery of employment opportunities in the advanced manufacturing, environmental technologies and distribution sectors.

7.155 The Eastern Employment Zone comprising the three areas of New Bridge Road (Former Cabot Carbon Site), Stanlow and Ince Park have considerable potential to achieve future economic growth. Within this area, employment land in the region of

50 ha is identified to the east of Shropshire Union Canal and west of New Bridge Road. Within Stanlow, the Essar group have recently acquired land and propose to invest in the region of £300 million. Ince Park is an extant planning commitment to the east of Ellesmere Port. It is a regionally significant proposal for the development of the UK's largest multi-modal Resource Recovery Park and Energy Waste Facility.

7.156 Land at Hooton Park, the location of the GM Vauxhall Motor works, is identified as an important sub-regional employment land and opportunities for freight transport on the rail network or via the Manchester Ship Canal is to be maximised. The Council is currently developing a Local Development Order for land adjacent to Vauxhall at Hooton Park. This will specify the type and scale of development here, supported by studies of traffic and transport needs. Nearby Port Bridgewater is consented for port related uses, but owner Peel may look to deliver a broader range of industrial and warehouse options here.

7.157 Ellesmere Port has strong links with Deeside and is a net exporter of skilled labour to manufacturing centres in eastern Flintshire and Wrexham. Major employers such as Airbus, Toyota, Essar and Vauxhall have supply chains which crisscross the England-Wales border.

Northwich/Winsford

7.158 There is a need for 30 ha of additional employment land in Northwich to support economic growth in the medium to long term for a range of B1/B2/B8 uses. This reflects high historic take-up rates here and the fact that land, notably at Lostock Triangle, has been lost to housing. Gadbrook Business Park is a key site for employment development. A further site will be identified through the Local Plan (Part Two) to meet the need for logistics/warehousing and distribution.

7.159 Winsford requires 35 ha of land for business and industrial development. The potential for expansion of Winsford Industrial Estate and Woodford Park Industrial Estate will be considered.

Rural Areas

7.160 Within the rural area, provision is made for 10 ha of employment development. This will enable small scale expansion of existing employment sites, and new sites within or on the edge of key services centres outside of Green Belt locations.

Shropshire Council

7.161 Shropshire Council formally adopted the Core Strategy (2006-2026) in February 2011. The Core Strategy sets out a County-wide need for 265–315 ha (around 290 ha) of land to 2026, of which 55–65 ha will be required in the North West Spatial Zone (centred around Oswestry) which borders Wrexham. Another 50–60 ha is proposed in the North East Spatial Zone which includes nearby Whitchurch. Development in the North West will be focused around the principal centre of Oswestry and the district centre of Ellesmere. In the North East Whitchurch and Market Drayton are the principal centres and Wem the district centre.

7.162 Core Strategy land allocations in Oswestry will include a Sustainable Urban Extension (SUE) to the south east of Oswestry, on land between Shrewsbury Road, Middleton Road and the A5/A483 Oswestry bypass. This will provide 750 plus dwellings, a local centre, a network of open space and green infrastructure and a new link Road between Shrewsbury Road and Middleton Road. This is supported by a significant employment allocation of 23 ha adjacent to the SUE to the east of the principal Mile End junction serving the town.

7.163 Shropshire Council is now in the process of completing three Site Allocations and Management of Development (SAMDev) Plan documents – the 2012 Preferred Policy Directions DPD, the 2013 Draft Development Management Policies DPD and the 2014 Pre-Submission Draft (Final Plan). The SAMDev Final Plan sets out an employment land requirement (2013–2026) of 39 ha for Oswestry, 9.20 ha for Ellesmere and 15 ha for Whitchurch. In all cases sufficient land has been identified locally to meet needs, including some 48 ha in eastern Oswestry around the A5/A483 Bypass. There is therefore no need for Shropshire to look to its neighbours in Cheshire and Wales to meet shortfalls.

7.164 It is generally argued that Wrexham has stronger links with Cheshire West and Chester and Wirral, than with Shropshire. Also Wrexham does not have the same agricultural basis to its economy that Shropshire does. However, high growth sectors in Shropshire include food and drink, environmental technology and advanced manufacturing, all of which are comparatively strong in Wrexham (and Flintshire) as well. There will therefore be cross border supply chain linkages between firms – for example with Market Drayton based Culina Logistics providing chilled food and drink

transport to Wrexham and Flintshire food producers.

7.165 The catchment area of the 100 ha Oswestry Industrial Estate also extends along the A5/A483 to include the southern settlements of Wrexham, while Wrexham Industrial Estate draws a modest proportion of its labour from Shropshire towns such as Whitchurch.

Wirral Metropolitan Borough Council

7.166 The Council consulted on a Proposed Submission Draft Core Strategy over December 2012 – February 2013. A summary of the comments received, the Council's recommended responses and a copy of the Council's initial proposed modifications were published for consultation over July – September 2013. The final Core Strategy is currently expected to be published for public comment towards the middle of 2014 before being submitted to the Secretary of State for public examination, subject to the completion of additional evidence on housing needs and economic viability.

7.167 The current Proposed Submission Draft Core Strategy identifies that some 200 ha of land will be required to accommodate new employment development for B1, B2, B8 and other similar employment uses between 2012 and 2028. The 2012 Employment Land and Premises Study Refresh (completed by BE Group) noted that Wirral had a realistic land supply 164.22 ha as of March 2011, giving a shortfall of just over 35 ha for the Plan period.

7.168 Wirral's employment land supply is focused on the eastern side of the peninsular, and future development is likely to focus on Wirral International Business Park at Bromborough and Wirral Waters. Wirral Waters will provide a large-scale, mixed-use, development within the Birkenhead Dock Estate at East Float, West Float and Bidston Dock. Development at East Float will provide some 15,193 dwellings; up to 428,794 sqm of offices and research and development facilities; up to 140,534 sqm of cultural, leisure, education, hotel and conferencing, community and amenity facilities; and up to 66,349 sqm of retail space. Development at West Float will be for industrial and port-related uses, including the delivery of a 228,300 sqm International Trade Centre and up to 116,529 sqm of B2/B8 general industrial and warehousing space. Bidston Dock will provide for further economic development.

7.169 The Borough's ports are facilities of significant to the regional economy. The Mersey Ports Growth Strategy seeks to build on the creation of Mersey Ports from the merger of Liverpool and the Manchester Ship Canal as a key driver for the City Region. The Mersey Ports Master Plan identifies 102 ha of land which is required for port expansion to 2030 and includes sites in Birkenhead and Eastham.

7.170 On the Dee Coast of the Wirral economic activity is on a much smaller scale. The Council therefore seeks to protect key assets such as Carr Lane Industrial Estate, Hoylake for small and medium scale industrial and commercial activities.

7.171 There are extensive Travel to Work linkages between Wirral and Wrexham and Flintshire. To further enhance these links, Wirral Council supports the enhancement of the Wrexham Central to Bidston railway line (also known as the Borderlands Line) to provide greater passenger and potentially freight services. Such enhancements would require greater joint working between Merseytravel and Arriva Trains Wales and possibly the electrification of the line (although the latter is generally assumed to be cost prohibitive).

Summary

7.172 13 major public sector organisations including WCBC and FCC, three education and health providers and 12 key businesses/landowners were consulted on a one to one basis as part of the study.

7.173 The MDA support economic activity spanning the North Wales/North West England border and seeks to promote business development, particularly in the manufacturing sector. Activities include helping business meet skills needs by working and linking with educational establishments, enhancing sub regional transport infrastructure and developing viable supply chains.

7.174 Whilst the North Wales Strategic Employment Land Strategy (2014) concludes there is no requirement for employment land to 2031 across the region, Economic Development officers at WCBC argue that there is a shortage of readily available land at Wrexham Industrial Estate as several large sites have been lost to strategic development proposals and a number of other sites are constrained. Whilst supply is constrained, demand for land of small and large plots, as well as for premises, is strong at the estate. Given this supply-demand gap, there may be a case for

allocating further land around the Estate. This is considered further in Section 10.0.

7.175 FCC recognises the importance of the manufacturing sector to the study area's economy. Demand for space within this sector remains high in Flintshire and is evident by the level of industrial take-up in 2013 (70,000 sqm), the high level of industrial property enquiries in 2014, and FCC's conversion rate from enquiry to take-up of land and premises (45 percent).

7.176 Deeside is FCC most prominent employment location benefitting from Enterprise Zone status creating 1,200 net new jobs and access to £70 million in Enhanced Capital Allowances. Great interest and rapid take-up of land is forecast, with sector development in the high value manufacturing industry (Deeside Technology and Skills Park). Growth is expected in Hawarden Business Park, whilst Mold may see contraction in some of the larger manufacturing business and only small scale demand for higher value manufacturing operation in comparison to Deeside. Future demand in Mold is likely to centre on office and retail premises.

7.177 The paragraphs below provide some initial conclusions on the comments made by key stakeholders in relation to employment land and premises.

7.178 Cefn Mawr Community Council put forward two sites considered suitable for B-Class uses:

- Former Flexsys site, Ruabon Works, Cefn-mawr – Premises within an existing industrial complex which is well integrated into the Cefn-mawr settlement area. Businesses are no longer trading here and consent for demolition was secured in August 2014. The owner's future plans for this site are not known but it assumed that they will seek consent for redevelopment in the short/medium term. The site is large enough to accommodate a mix of uses and the owner/developer should be encouraged to provide some B1/B2/B8 premises within any redevelopment scheme, to offset the loss of this large industrial complex and provide local employment.
- The Ebenzer/Glass House, Crane Street, Cefn Mawr – This chapel has been restored into a centre for community services and facilities, office and gallery spaces and a café bar. The range of uses appropriate for this property have therefore been established and could include B1(a) offices.

7.179 Gresford Community Council recommend two locations within the community as appropriate for B-Class uses:

- The site of the former Antique Shop at 7 Chester Road, Gresford – Mid-sized retail premises with some off street parking. If it has not already been reused, the property would be suitable to accommodate a single B1(a) office occupier or A2 retailer. Generally, its contribution to local employment will be modest and securing this premises for B-Class employment should not be considered a high priority for WCBC
- Allington Hall, Vicarage Lane, Gresford – This is the former Gresford Youth Club, which extends to 665 sqm and includes a hall, stores, toilets and offices. Formerly owned by WCBC the property was sold at auction in October 2014. The new owners plans for this property are not known but given its position on a comparatively narrow residential street, bounded by housing, it would only be suitable for accommodating a smaller B1(a) office business. Again, its contribution to local employment will be modest and securing this premises for B-Class employment should not be considered a high priority for WCBC

7.180 Glyndwr University are looking to consolidate activity at Plas Coch Campus in Wrexham, expanding its facilities and the level of employment here. Proposals may include the provision of a micro business incubation centre. However, as this is a consolidation, the University will not be seeking any additional land in Wrexham. Indeed plans call for the disposal of the College of Art, two residential properties, undeveloped land at Dean Road and the Gatewen Site, Gatewen. This will free up a number of properties and sites, in and around, Wrexham town for other uses.

7.181 The range of uses appropriate on each of these sites will need to be agreed with WCBC. However, the University has indicated that it will be seeking high value uses on all its future disposal sites, in order to fund change at Plas Coch and at the Northop Campus in Flintshire. This primarily means housing but could include retail/leisure options. B1/B2/B8 employment is unlikely to generate the capital receipts needed. It cannot therefore be assumed that any of these sites will be made available for B-Class employment. Given the relatively modest demand for office uses in Wrexham town indicated by stakeholders in Section 5.0 and the general oversupply of employment land in the County Borough, indicated in Section 9.0,

securing any of these sites for B1/B2/B8 employment should not be a high priority for WCBC. Rather the need to support Glyndwr University in its plans for change at Plas Coch Campus, which will generate employment benefits for the town, would seem to be more important.

7.182 If Glyndwr University does expand outside of its present facilities, it is likely to be at the Northop Campus in Flintshire, where the University has greenfield landholdings which extend across the A55. Subject to achieving capital receipts from land sales elsewhere, the University would wish to develop this land for lab space, residences and car parking. The issues associated with the loss of this greenfield land have not been explored in this study, but subject to policy, ecology and planning constraints it is recommended that FCC support Glyndwr University in its plans to expand in the County and provide further education related employment. This development would not involve the loss of any employment land.

7.183 Coleg Cambria has a ten year estates plan amounting to £75 million in investments. However, again most change will be within its existing campuses. With the purchase of the former Groves High School site (i.e. land already designated for education uses) the College has all the additional land it requires. Future actions are likely to include the disposal of the Wrexham Training Centre, Ruabon Road and WCBC should approach Coleg Cambria, if it has not already done so, to discuss appropriate alternative uses on this site. Again there is not an urgent need to secure this site for B1/B2/B8 employment.

7.184 Betsi Cadwaladr University Health Board confirmed that an updated Site Development Plan is being prepared for Wrexham Maelor Hospital. This will see some growth within the existing hospital site but does not envisage the release of any hospital land for other uses. There are also no significant plans for change at the community hospitals in Chirk, Deeside, Holywell, Mold or Penley, beyond some consolidation and/or relocation of certain medical service

7.185 The two large developments planned by the University Health Board – Caia Park Primary Care Resource Centre in Wrexham and the Ambulance and Fire Service Joint Resource Centre in the south of Wrexham town – are consented and/or underway.

7.186 There may be potential options to dispose of the existing fire station at Bradley Road in Wrexham, and the existing ambulance stations in Chirk and Wrexham owned by Betsi Cadwaladr University Health Board. WCBC should therefore consider what alternative uses might be appropriate on these sites. The University Health Board has no other land or property requirements.

7.187 In summary therefore, while the major education and health providers are planning to grow their facilities and levels of employment in the study area. None have any land requirements at present and there appears no need for any major land allocations in these sectors.

7.188 Only two of the company stakeholders consulted in the study area – Kronospan in Wrexham and Knauf Insulation in Flintshire – would potentially relocate as they are constrained by development in all directions. However, this would be a long term option (in excess of five years).

7.189 Kronospan have identified farmland to the north, which it owns, as an option for future growth. This area is beyond the current development boundary of Chirk, but is seen as a logical extension to the current industrial operations. As stated, the land will not be required in the short or medium term, but there is still a need to determine if this land can be viably allocated in the emerging LDP for employment purposes. The allocation would be to meet the specific needs of this major local employer and without prejudice to the general view of this study that Wrexham has an employment land oversupply (see Section 9.0). If this land is judged not viable for B1/B2/B8 employment then WCBC should engage proactively with Kronospan to identify viable alternative sites within the County Borough.

7.190 All other businesses that are expecting growth within the next five years can accommodate this within their existing curtilage or existing building footprint.

7.191 The Port of Mostyn has the long term aspiration to develop some 12-16 ha of land to the north for a renewable energy manufacturing (and energy generation) park. This would, amongst other things, link turbine manufacture directly to the port facilities. However, delivery of such a proposal would require the identification of large scale demand from renewable energy businesses. It would also require development within

a strongly protected area of environmental quality on the Dee Estuary The viability/deliverability of this proposal thus remains questionable at this time and FCC should engage with the Port to discuss if this option can be realised.

7.192 All of the Welsh local authorities which neighbour Wrexham and Flintshire have sufficient employment land to meet their own needs and do not need to look to the Counties to support any shortfalls. Of the three neighbouring English local authorities, only Cheshire West and Chester Council may need to look to neighbouring Flintshire to support further industrial growth.

8.0 COMPANY SURVEY

Introduction

8.1 A business survey has been carried out to establish the evidence of demand for land and property, and substantiate findings in other sections of this study. It also widens the consultation process and provides direct empirical data on the demand for property and land. It is another strand of evidence that will be used to inform the Study's conclusions and recommendations.

Methodology

8.2 A questionnaire (included at Appendices 9 and 10), with explanatory covering letter and pre-paid envelope, was sent out to 700 companies – 320 in Wrexham and 380 in Flintshire. In addition to this, the questionnaire was also sent to the Wrexham Industrial Estate Business Forum by email. The list of companies to be surveyed was sourced from EGi, a specialist commercial property database. In 2014 there were approximately 9,865 VAT Registered businesses across the whole study area (according to the Office of National Statistics data). Allowing for the fact that approximately 30 percent will be non-B1, B2 or B8 uses (e.g. retail), a representative sample of 700 businesses, would equate to a 10 percent sample.

Response

8.3 The postal/online response achieved, was 12.4 percent. Building on this, follow-up telephone calls were made to elicit better co-operation from businesses. The actions significantly enhanced the number of responses, up to 50.1 percent of the total originally targeted (700). It also established those companies who have either ceased trading or are no longer in the study area.

8.4 Overall, 354 questionnaires have been completed (160 in Wrexham and 194 in Flintshire). This equates to a 5.1 percent sample of the study area's relevant business population. The responses are broken down as follows:

Wrexham

- Wrexham Town – 32 companies
- Wrexham Industrial Estate – 48 companies
- Llay Industrial Estate including Llay – 17 companies
- South East, Maelor Area – 8 companies

- South West Wrexham – 23 companies
- North West Wrexham – 18 companies
- East Wrexham – 4 companies
- North East Wrexham – 10 companies

Flintshire

- Deeside includes Connah's Quay – 47 companies
- Sealand and Saltney includes Shotton – 29 companies
- Queensferry includes Sandycroft – 12 companies
- Buckley includes Hawarden – 43 companies
- Mold – 36 companies
- Flintshire Coast including Flint, Greenfield, Holywell – 27 companies.

Company Size

8.5 Of the 354 companies taking part in this survey, only one failed to provide their employee numbers. The remaining 353 companies employ 10,429 people. Of these, 6.6 percent are part-time employees, as shown in Table 69.

Table 69 – Number of Employees

Area	Full Time	Part Time
Wrexham		
Wrexham Town	706	56
Wrexham Industrial Estate	2,108	187
Llay Industrial Estate (including Llay)	927	44
South East, Maelor Area	145	19
South West Wrexham	527	56
North West Wrexham	247	15
East Wrexham	45	12
North East Wrexham	494	17
Flintshire		
Deeside	3,159	130
Sealand and Saltney	175	44
Queensferry	234	29
Buckley	424	24
Mold	268	23
Flintshire Coast	281	33

Total	**9,740**	**689**

Source: BE Group 2014

8.6 Table 70 shows that total responses generally follow the national profile of small company employment. A high proportion are micro businesses (1-10 employees), with 89.7 percent employing less than 50 people. However, looking individually at Wrexham, there is an unusually small proportion of companies with ten or less employees (just 8.8 percent) and a large proportion of small firms (77.5 percent).

8.7 There are 36 companies with over 50 employees, 12 of which are in Wrexham Industrial Estate. Four companies in the study area employ over 300 employees:

- Magellan Aerospace, Llay with 398 employees
- 2 Sister Poultry, Deeside with 1,199 employees
- Farmers Bay, Deeside with 650 employees
- UPM Shotton, Deeside with 302 employees.

Table 70 – Company Size

Area	Company Size, employees							Total
	0-2	3-5	6-10	11-20	21-50	51+	Not stated	
Wrexham								
Wrexham Town	1	1	1	23	4	2	-	32
Wrexham Industrial Estate	-	1	2	14	19	12	-	48
Llay Industrial Estate	1	-	-	5	6	5	-	17
South East, Maelor Area	-	-	-	6	2	-	-	8
South West Wrexham	1	-	1	12	8	1	-	23
North West Wrexham	-	-	2	16	-	-	-	18
East Wrexham	-	1	-	2	1	-	-	4
North East Wrexham	1	1	-	5		3	-	10
Flintshire								
Deeside	18	4	6	5	6	8	0	47
Sealand and Saltney	8	8	4	7	2	0	0	29

Area	Company Size, employees							Total
	0-2	3-5	6-10	11-20	21-50	51+	Not stated	
Queensferry	3	2	2	0	1	3	1	12
Buckley	19	8	5	4	6	1	0	43
Mold	17	13	3	2	-	1	0	36
Flintshire Coast	6	7	6	4	3	1	0	27
Total	**75**	**46**	**32**	**105**	**59**	**36**	**1**	**354**
Proportion of Companies Responding, percent	**21.2**	**13.0**	**9.0**	**29.7**	**16.7**	**10.2**	**0.0**	**100.0**

Source: BE Group 2014

Current Premises

8.8 Companies were asked to state the type of property they occupy e.g. offices, industrial, warehouse, etc with some companies occupying a mix of units. Industrial premises dominate. Table 71 shows that over half of the companies replying (54.2 percent) occupy industrial/warehouse accommodation. Just over a quarter of respondents are in offices, and a similar level work from home. Only one company occupies a barn conversion/farm location.

Table 71– Responses by Premises Type Occupied

Area	Property Type						Total
	Industrial	Office	Home	Warehouse	Serviced Office	Barn conversion / Farm Location	
Wrexham							
Wrexham Town	11	10	10	0	1	0	32
Wrexham Industrial Estate	39	2	0	7	0	0	48
Llay Industrial Estate	11	-	2	4	-	-	17
South East, Maelor Area	4	-	3	1	-	-	8
South West Wrexham	13	5	2	2	1	-	23

Area	Property Type						Total
	Industrial	Office	Home	Warehouse	Serviced Office	Barn conversion / Farm Location	
North West Wrexham	8	2	7	1	-	-	18
East Wrexham	2	-	1	1	-	-	4
North East Wrexham	7	1	2	-	-	-	10
Flintshire							
Deeside	23	16	12	10	3	0	64
Sealand and Saltney	9	18	3	7	1	0	38
Queensferry	8	2	3	2	0	0	15
Buckley	12	11	21	5	2	0	51
Mold	9	8	19	1	0	0	37
Flintshire Coast	15	6	6	3	1	1	32
Total	**171**	**81**	**91**	**44**	**9**	**1**	**397**
Proportion of Companies Responding, percent	**43.1**	**20.4**	**22.9**	**11.1**	**2.3**	**0.0**	**100.0**

Source: BE Group 2014

8.9 Companies were asked to indicate whether they own or rent their property. Table 72 shows that overall there are very similar proportions of companies that rent or own their premises. This is unsurprising since 22.9 percent of companies are home-based. Examination of each local authority area reveals a greater proportion of companies own their premises, rather than lease in Flintshire, with the reverse being the case in Wrexham.

Table 72 –Tenure of Premises Occupied

Area	Tenure of Accommodation		Total
	Leasehold	Freehold	
Wrexham			
Wrexham Town	17	15	32
Wrexham Industrial Estate	28	20	48

Area	Tenure of Accommodation		Total
	Leasehold	Freehold	
Llay Industrial Estate	8	9	17
South East, Maelor Area	3	5	8
South West Wrexham	15	8	23
North West Wrexham	8	10	18
East Wrexham	2	2	4
North East Wrexham	5	5	10
Flintshire			
Deeside	14	33	47
Sealand and Saltney	22	7	29
Queensferry	7	5	12
Buckley	12	30	42
Mold	10	26	36
Flintshire Coast	13	14	27
Total	**161**	**189**	**350**
Proportion of Companies Responding, percent	**46.0**	**54.0**	**100.0**

Source: BE Group 2014

8.10 Table 73 indicates the sizes of premises occupied by companies. Overall, emphasis is on premises of 1,000 sqm or less (46.0 percent), with the greatest proportion (15.8 percent) based in premises of between 501-1,000 sqm.

Table 73 – Size of Premises Occupied

Number of Companies Responding	Size, sqm								Total
	0 - 100	101 - 200	201 - 500	501 - 1,000	1,001 - 2,000	2,001 - 5,000	5,001+	Not stated / work from home	
Wrexham									
Wrexham Town	4	3	6	4	2	1	-	12	32
Wrexham Industrial Estate	1	1	6	12	6	15	3	4	48
Llay Industrial Estate	1	-	2	3	4	3	1	3	17
South East, Maelor Area	-	-	2	3	1	-	-	2	8
South West	5	5	4	3	3	1	-	2	23

Number of Companies Responding	Size, sqm								Total
	0 - 100	101 - 200	201 - 500	501 - 1,000	1,001 - 2,000	2,001 - 5,000	5,001+	Not stated / work from home	
Wrexham									
North West Wrexham	1	3	1	5	1	-	-	7	18
East Wrexham	-	1	2	-	-	-	-	2	4
North East Wrexham	1	-	4	1	-	1	-	3	10
Flintshire									
Deeside	1	4	5	6	4	8	6	13	47
Sealand and Saltney	2	6	8	5	1	2	0	5	29
Queensferry	0	1	1	1	3	2	1	3	12
Buckley	1	2	5	6	4	2	0	23	43
Mold	3	1	6	2	5	0	0	19	36
Flintshire Coast	2	5	1	5	2	4	1	7	27
Total	**22**	**32**	**53**	**56**	**36**	**39**	**13**	**103**	**354**
Proportion of Companies Responding, percent	**6.2**	**9.0**	**15.0**	**15.8**	**10.2**	**11.0**	**3.7**	**29.1**	**100.0**

Source: BE Group 20014

8.11 Respondents were asked to comment on whether they were satisfied with their present accommodation, and if not to explain why. Table 74 shows that 96.0 percent are content.

Table 74 – Satisfaction with Current Premises

Number of Companies Responding	Size, sqm				Total
	Very satisfied	Satisfied	Unsatisfied	Very unsatisfied	
Wrexham					
Wrexham Town	3	28	1	-	32
Wrexham Industrial Estate	10	36	2	-	48
Llay Industrial Estate	2	15	-	-	17

Number of Companies Responding	Size, sqm				Total
	Very satisfied	Satisfied	Unsatisfied	Very unsatisfied	
South East, Maelor Area	-	8	-	-	8
South West Wrexham	2	18	2	1	23
North West Wrexham	-	16	2	-	18
East Wrexham	-	4	-	-	4
North East Wrexham	1	9	-	-	10
Flintshire					
Deeside	10	35	2	0	47
Sealand and Saltney	7	22	0	0	29
Queensferry	2	9	1	0	12
Buckley	9	32	2	0	43
Mold	5	31	0	0	36
Flintshire Coast	3	23	1	0	27
Total	**54**	**286**	**13**	**1**	**354**
Proportion of Companies Responding, percent	**15.3**	**80.8**	**3.7**	**0.3**	**100.0**

Source: BE Group 2014

8.12 All eight of the companies based in Wrexham that are unsatisfied with its property provided explanation. One company currently lease its premises, and would like to purchase a building. Two companies based in the western settlements and Wrexham town require more space for current and future expansion needs. Two companies have poor access onto its premises. One of these companies is also unsatisfied with its charges and state it has limited options to move as it requires a high level of power supply for its business operations. A further company in the Rural Hinterland West state its business rates are too high for the size of its business operation. One company has issues with the general maintenance of the Council owned property it leases. The final company, based in Wrexham Industrial Estate are not able to occupy all of its premises and did not provide further explanation.

8.13 Five of the six Flintshire based companies provided further explanations for the dissatisfaction with their property. Two companies, based in Deeside and Buckley,

require larger premises, with the latter company also lacking the funds for expansion. Two further companies are unhappy with the lack of assistance from FCC. Finally, a company based within the Flintshire Coast area has no real passing trade and limited council services because of its rural setting.

Future Accommodation Requirements

8.14 Companies were asked to indicate whether they are considering moving premises in the next 12 months, or 2-5 years. 13 companies in Wrexham indicated that they are intending to relocate; with four of them proposing that this will happen in the next year, and the other nine in 2-5 years. One company requires an office, and five companies require industrial/warehousing space (with one also requiring ancillary land for storage). Five companies require a mix of office and industrial/warehouse space. A further two land requirements have been identified.

8.15 Three companies in Flintshire are expecting to relocate in the next year and a further 11 companies expect relocation in 2-5 years. Five of these Flintshire based companies require office space, and a further four require industrial/warehouse space. Five further companies require a mix of office and industrial accommodation, with one of these companies also requiring land.

8.16 The forecasted future space needs by size, tenure, quality and location type are shown in Tables 75, 76 and 77. Companies requiring both industrial and office space, are recorded within the industrial table (Table 76). This is because generally, office space is ancillary to industrial accommodation.

Table 75 – Property Requirements by Location and Type – Offices

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Wrexham – Western Villages				
Town Centre	0-100	101-200	Freehold / Moderate	The company is in the process of purchasing an adjacent property in Gwersyllt
Flintshire - Buckley				

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Industrial Estate / Rural	501-1,000	501-1,000	Leasehold / Moderate	Mold / Flint / Buckley / Chester Boundary / Wrexham / Elsewhere in North Wales / Elsewhere in Wales / Chester / Elsewhere in Cheshire
Flintshire – Mold				
Technology/Business Park	0-100	0-100	No Preference / Moderate or Budget	Mold
Town Centre	Unknown	Unknown	No Preference / Moderate	Mold / Manchester
Flintshire – Sealand/Saltney				
Town Centre	101-200	201-500	No Preference / Moderate	Elsewhere in Flintshire / Shotton
Technology/Business Park / Rural	201-500	1001-2000	Freehold / Moderate	Chester Boundary / Chester
Total	**803-1,900**	**1,804-3,800**		

Source: BE Group 2014

Table 76 – Property Requirements by Location and Type – Industrial

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Wrexham – Western Villages				
Industrial Estate	0-100	101-200	Leasehold / Moderate	Wrexham Town / Wrexham Industrial Estate / South East, Maelor Area / South West Wrexham / East Wrexham / Elsewhere in Wrexham County Borough / Flintshire / Chester
Industrial Estate	101-200	501-1,000	No Preference / Moderate	Wrexham County Borough - as near to Chirk/St Martins as possible
Industrial Estate	201-500	501-1,000	Freehold / Moderate	Wrexham Industrial Estate

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Technology/Business Park	0-100	0-100	Leasehold / Moderate	Wrexham Industrial Estate / South West Wrexham
Industrial Estate	1,001-2,000	501-1,000	No Preference / Moderate	Wrexham Industrial Estate / South West Wrexham / North West Wrexham
Industrial Estate	1,001-2,000	2,001-5,000 and >1.62 ha of land	Freehold / Moderate	Flintshire
Wrexham – Wrexham Town				
Industrial Estate	2,001-5,000	5,000+	No Preference / No Preference	Wrexham Industrial Estate
Wrexham – Wrexham Industrial Estate				
Unknown	0-100	101-200	Freehold / Moderate	Wrexham Industrial Estate / South East, Maelor Area
Industrial Estate	201-500	501-1,000	Freehold / Basic or Budget	Llay Industrial Estate
Industrial Estate	Additional	201-500	No Preference / No Preference	Elsewhere in Cheshire / Yorkshire
Flintshire - Buckley				
Industrial Estate	501-1,000	2,001-5,000 and 1.6-2.0 ha of land	Freehold / Moderate	Deeside Industrial Estate / Buckley
Unknown	Additional	501-1,000	Leasehold / Moderate	Buckley
Flintshire – Deeside				
Unknown	Additional	1,001-2,000	Leasehold / Basic or Budget	Deeside Industrial Estate / Deeside / Elsewhere in North Wales
Industrial Estate	101-200	101-200	No Preference / Basic or Budget	Chester
Industrial Estate	201-500	501-2,000	No Preference / Moderate, Basic or Budget	Elsewhere in Flintshire

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Industrial Estate / Technology/Business Park	2,001-5,000	1,001-2,000	No Preference / Prestigious or New	Elsewhere in Flintshire
Flintshire - Flintshire Coast				
Industrial Estate / Technology/Business Park	101-200	201-500	No Preference / Moderate	Deeside Industrial Estate / Flint / Chester Boundary / Chester
Flintshire - Queensferry				
Industrial Estate	9,290 and 0.8 ha of land	9,290 and 1.21 ha of land	No Preference / Moderate	Deeside Industrial Estate / Connah's Quay / Queensferry
Flintshire - Sealand/Saltney				
Industrial Estate	101-200	201-500	Leasehold / Moderate	Chester Boundary
Total	**16,802–26,390**	**24,206-37,490**		

Source: BE Group 2014

Table 77 – Property Requirements by Location and Type – Land

Location Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Wrexham – Western Villages				
Rural	0-100	501-1000	Freehold / No Preference	Elsewhere in Wrexham County Borough
Wrexham - Rural Hinterland North				
Rural	0-100	0-100	No Preference / Basic or Budget	Llay Industrial Estate / East Wrexham
Total	**0-200**	**501-1100**		

Source: BE Group 2014

Summary Tables of Office Requirements

Table 78 – Summary of Office Requirements – Sizes

Size, sqm	Number of Companies Responding	Proportion of Companies Responding, percent
0-100	1	16.7

Size, sqm	Number of Companies Responding	Proportion of Companies Responding, percent
101-200	1	16.7
201-500	1	16.7
501-1,000	1	16.7
1,001-2,000	1	16.7
2,001-5,000	-	-
5,001+	-	-
Unknown	1	16.7
Total	**6**	**100.0**

Source: BE Group 2014

Table 79 – Summary of Office Requirements – Tenure

Tenure	Number of Companies Responding	Proportion of Companies Responding, percent
Leasehold	1	16.7
Freehold	2	33.3
No Preference	3	50.0
Total	**6**	**100.0**

Source: BE Group 2014

Table 80 – Summary of Office Requirements – Quality

Quality	Number of Companies Responding	Proportion of Companies Responding, percent
Basic/Budget	1	14.3
Moderate	6	85.7
Prestigious/New	-	-
No Preference	-	-
Total	**7***	**100.0**

Source: BE Group 2014

**Multiple answers given by one or more companies*

Table 89 – Summary of Office Requirements – Location Type

Location Type	Number of Companies Responding	Proportion of Companies Responding, percent
Town Centre	3	37.5
Industrial Estate	1	12.5
Technology/Business Park	2	25.0
Rural	2	25.0
Total	**8***	**100.0**

Source: BE Group 2014
**Multiple answers given by one or more companies*

8.17 Analysis of the six office requirements across the study area suggests that each firm wants very different types of accommodation. Stated demand is for premises up to 2,000 sqm. Between them, the six companies want premises in both tenures and of basic/budget and moderate quality. The three smallest requirements are loyal to the study area, with one of these already in the process of acquiring a neighbouring property. One requirement of an unspecified size is interested in a town centre location in Mold or Manchester. One of the two larger property requirements has an interest within and outside of the study area, incorporating the whole of Wales and Cheshire and Chester. This should be associated with an industrial estate or a rural environment. The largest property requirement of 1,001-2,000 sqm is a move to the Chester Boundary or the Chester area and should be associated with a technology/business park environment or a rural location. The total floorspace requirement for office space is increased by 1,001-1,900 sqm.

Summary Tables of Industrial Requirements

Table 90 – Summary of Industrial Requirements – Sizes

Size, sqm	Number of Companies Responding	Proportion of Companies Responding, percent
0-100	1	5.0
101-200	3	15.0
201-500	3	15.0
501-1,000	6	30.0
1,001-2,000	3	15.0
2,001-5,000	2	10.0
5,001+	2	10.0
Total	**20***	**100.0**

Source: BE Group 2014

**Multiple answers given by one or more companies*

Table 91 – Summary of Industrial Requirements – Tenure

Tenure	Number of Companies Responding	Proportion of Companies Responding, percent
Freehold	5	26.3
Leasehold	5	26.3
No Preference	9	47.4

Tenure	Number of Companies Responding	Proportion of Companies Responding, percent
Total	**19**	**100.0**

Source: BE Group 2014

Table 92 – Summary of Industrial Requirements – Quality

Quality	Number of Companies Responding	Proportion of Companies Responding, percent
Prestigious/New	1	5.0
Moderate	13	65.0
Basic/Budget	4	20.0
No Preference	2	10.0
Total	**20***	**100.0**

Source: BE Group 2014

**Multiple answers given by one or more companies*

Table 93 – Summary of Industrial Requirements – Location Type

Location Type	Number of Companies Responding	Proportion of Companies Responding, percent
Town Centre	-	-
Industrial Estate	15	71.4
Technology/Business Park	3	14.3
Rural	-	-
Unknown	3	14.3
Total	**21***	**100.0**

Source: BE Group 2014

** Multiple answers given by one or more companies*

8.18 Tables 75 and 76 show how much greater industrial demand is compared to the office sector, both in terms of floorspace and number of requirements. Industrial requirements outnumber offices by a ratio of 3:1. The additional industrial floorspace required to meet the industrial requirements is between 7,102 sqm and 10,400 sqm (excluding requirements solely for outside of the study area).

8.19 There are 19 industrial requirements with one requirement spanning two size bands. Demand is spread across all unit sizes, with 30 percent of respondents wanting units of 501-1,000 sqm. The companies appear to be committed to Wrexham and Flintshire. An almost equal share of requirements is for property within Wrexham and Flintshire (43.6 percent and 41.0 percent, respectively). Four companies have

interest within and outside of the study area. Two companies suggest expansion or relocation may occur outside of the study area (in Chester and Cheshire/Yorkshire).

8.20 Where companies have stated a preference for tenure type, this is for a mix of freehold and leasehold property. However, it should be noted that 47.4 percent of the companies indicate they have no preference regarding purchasing or leasing property. The majority of companies want industrial property of moderate quality with a fifth looking for basic/budget accommodation. There is only one company requiring prestigious/new quality units and two have not stated a preference. Locations in industrial estates are preferred.

Summary Tables of Land Requirements

Table 94 – Summary of Land Requirements – Sizes

Size, sqm	Number of Companies Responding	Proportion of Companies Responding, percent
0-100	1	50.0
101-200	-	-
201-500	-	-
501-1,000	1	50.0
1,001-2,000	-	-
2,001-5,000	-	-
5,001+	-	-
Total	**2**	**100.0**

Source: BE Group 2014

Table 95 – Summary of Land Requirements – Tenure

Tenure	Number of Companies Responding	Proportion of Companies Responding, percent
Freehold	1	50.0
Leasehold	-	-
No Preference	1	50.0
Total	**2**	**100.0**

Source: BE Group 2014

Table 96 – Summary of Land Requirements – Quality

Quality	Number of Companies Responding	Proportion of Companies Responding, percent
Prestigious/New	-	-
Moderate	-	-
Basic/Budget	1	50.0
No Preference	1	50.0
Total	**2**	**100.0**

Source: BE Group 2014

Table 97 – Summary of Industrial Requirements – Location Type

Location Type	Number of Companies Responding	Proportion of Companies Responding, percent
Town Centre	-	-
Industrial Estate	-	-
Technology/Business Park	-	-
Rural	2	100.0
Total	**2**	**100.0**

Source: BE Group 2014

8.21 There are only two land requirements for an additional 501-900 sqm. Both are for relocation to a rural environment within Wrexham. One respondent requires freehold land for industrial storage purposes, with no preference on the quality. The other company is looking at purpose build opportunities on land of basic or budget quality either to lease or purchase.

Property Factors

8.22 20 of the 27 companies expecting to move in the next five years identified the most important factor(s) when looking for alternative accommodation. These are shown in Table 98. Several companies gave more than one reason.

8.23 The most important factor identified is accessibility and the size of the premises. The specification and cost of property are also seen as important.

Table 98 – Most Important Factor(s) When Seeking Alternative Accommodation

Quality	Number of Companies Responding
Accessibility	7

Quality	Number of Companies Responding
Size	7
Specification of property (e.g. appropriate storage space, lorry loading access, product demonstration facilities, etc.)	6
Cost (including business rates)	3
Local authority support(including funding availability)	1
Location	1
Quality of premises	1
No restrictions on business operation/property/land	1
Maintenance	-
Superfast Broadband	-

Source: BE Group 2014

Perceptions/Comments

8.24 Respondents also made additional comments relating to the wider business environment, with some making several comments (see Table 99). The most common complaint is about lack of business support.

Table 99 – Other Issues

Comments	Number of Times Commented On
Poor business support	2
Strict regulations/restrictions	1
Public transport is important	1
Skills shortage	1
Staff recruitment is difficult	1
Secure premises	1
Serviced site	1

Source: BE Group 2014

Summary

8.25 The company survey secured a 50.1 percent response rate.

8.26 The survey results reflect the study area's local economy structure. Despite the general economic shift from industrial to service sector activity, the former remains a strong focus for the area. This applies both in terms of the number of requirements and the total floorspace requirement.

8.27 In terms of industrial need, the greatest demand is for mid-sized units of 501-1,000 sqm, although there is a level of demand across all sizes – to over 5,000 sqm. Where companies have indicated a preference, this is for both leasehold and freehold premises. Industrial estates are the most popular locations. Most companies want moderate quality accommodation, and a smaller number require basic/budget premises. Only one company has need for a new or modern property, and a couple of companies have no preference. Geographically, demand is strongest for Wrexham Industrial Estate followed by Deeside Industrial Estate.

8.28 The findings in Section 4.0 – Property Market General, assess the supply of available premises. In Table 100 the available properties are aligned to the identified company requirements as one test of the supply and demand situation.

8.29 Table 100 illustrates, that overall the study area has a reasonable range of industrial premises, in that there is some availability in most size bands. However this supply is weighted towards premises of less than 500 sqm. Based against even a relatively small sample (approximately five percent) of the study area's stock of businesses there appears to be an shortage of mid-sized and large buildings (501 sqm and above), which could constrain expansion plans, or see relocations to available properties outside the study area. This is particularly noticeable in Wrexham.

8.30 Table 100 also shows that the supply of office accommodation is spread across all size bands. Based against the company requirements from the sample, it appears that office supply can meet demand. The only exception appears to be for larger floorplate offices, greater than 1,001 sqm in size in Flintshire.

Table 100 –Study Area Premises Supply and Demand Analysis

Wrexham				
Requirement Property Size, sqm	**Industrial**		**Office**	
	Available Units	**Number of Requirements Identified by Company Survey**	**Available Units**	**Number of Requirements Identified by Company Survey**
0-100	8	2	34	-
101-200	16	2	21	1
201-500	17	1	20	-

Wrexham				
Requirement Property Size, sqm	Industrial		Office	
	Available Units	Number of Requirements Identified by Company Survey	Available Units	Number of Requirements Identified by Company Survey
501-1,000	4	4	5	-
1,001-2,000	2	-	4	-
2,001-5,000	3	1	-	-
5,001+	3	1	-	-
Flintshire				
Requirement Property Size, sqm	Industrial		Office	
	Available Units	Number of Requirements Identified by Company Survey	Available Units	Number of Requirements Identified by Company Survey
0-100	7	-	32	1
101-200	22	2	11	-
201-500	48	1	11	1
501-1,000	20	2	5	1
1,001-2,000	9	2	-	1
2,001-5,000	7	1	-	-
5,001+	5	1	-	-

Source: BE Group 2014

8.31 As Table 101 illustrates, in terms of quality the available accommodation meets the identified requirements for office and industrial space. Based against this sample of the study area's stock of businesses there appears to be sufficient tenures and quality types to meet requirements. As this is only a sample, if the demand was increased by a factor of 20 in line with the total number of businesses there is a shortage of all property types and a shortage of freehold property within the industrial and office sector.

Table 101 –Study Area Premises Supply – Overall Qualitative Analysis

Requirement Property Size, sqm	Industrial		Office	
	Available Units	Number of Requirements Identified by Company Survey	Available Units	Number of Requirements Identified by Company Survey
Leasehold	143	5	130	1
Freehold (or Either)	28	14	15	5

Good Quality/New (includes business without a preference)	21	3	5	-
Moderate	114	13	131	6
Basic/Budget	36	4	9	1

Source: BE Group 2014

8.32 It should be remembered that the company survey is just one strand of evidence, providing an illustration of pent-up demand. It is not the sole answer. It is probable that not all the company requirements identified by the survey returns will come to fruition. Equally there will be other companies who were surveyed that stated that they do not intend to relocate or expand at the moment, but which may well do so over the next five years. It should also be noted that this survey has been undertaken during a period of continuing challenging national and global economic conditions. This is likely to impact on companies' future plans and the timing of these plans.

9.0 GROWTH FORECASTS

Introduction

9.1 This section explains the models we have applied to the assessment of employment land allocations for the LDP periods for Wrexham and Flintshire – 2013 to 2030 for Wrexham, 2015 to 2030 for Flintshire.

9.2 The employment forecasts are based on the 2014 Local Economy Forecasting Model (LEFM), produced by Cambridge Econometrics and the Institute of Employment Research for the North East Wales local authorities of Denbighshire, Wrexham and Flintshire. This provided employment and GVA growth modelling for the period 2000-2025. To better reflect LDP periods for Wrexham and Flintshire, Cambridge Econometrics was subsequently commissioned, as part of this study, to provide updated projections of employment and GVA by industry sector to 2030.

9.3 The standard job related densities used equate to those identified in the Homes and Communities Agency and OFFPAT (Office of Project and Programme Advice and Training) Employment Densities Guide 2nd Edition, published in 2010.

Scenario Testing for Market Recovery

9.4 The study brief seeks scenarios for market recovery, from the recent recession. In regards to this it is worth noting that the employment forecasts are based on the 2014 LEFM produced by Cambridge Econometrics and the Institute of Employment Research. This forecasting was produced during the post 2012 recovery period and reflects the latest views on market recovery for the North East Wales sub-region. As indicated, the forecasting was further updated, for this study, to meet the specific needs of Wrexham and Flintshire.

9.5 Other elements, in this section include consideration of projected growth by sector and identifying areas of projected jobs growth and loss. In both cases the realism of projected growth/loss is compared against Wrexham and Flintshire's past performance during periods of economic growth and decline. Where projected jobs and land growth/decline differs significantly from past performance, something evident in Flintshire, this is considered critically to determine the realism of the individual projections. The result is three scenarios for change:

- A baseline or low growth scenario – This is a net requirement based on projected growth/reduction of employment in industry sectors and assumes that growth in sectors projected to recover well from recession (identified below) will be offset by continued decline in others
- A high growth scenario – This scenario looks only at demand from sectors projected to grow and does not make corresponding reductions in need to account for sectors projected to decline. This reflects the assumption that the decline in jobs particularly in some manufacturing sub-sectors will not automatically actually lead to the release of land. Past experience suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate
- A long term land take-up scenario – Reflects the real world experience of development activity in the Counties over past periods of market growth and recession.

Historic Land Take-Up

9.6 Past experience (based on the completion of some 35 employment land reviews, including studies for Denbighshire, Conwy, Cheshire West and Chester and Shropshire) indicates that the rate at which land is taken up (or at least planned for employment) runs significantly ahead of actual employment change recorded through the standard statistical records such as ONS. It also exceeds estimates produced by the traditional forecasting houses (e.g. Cambridge Econometrics or Oxford Economics). It is unclear why this is the case but our past work indicates that recorded actual land take-up rates run at around 3 to 4 times the expected rates at which land should be taken up according to what is being measured on the ground. Put simply therefore where past employment change would suggest that 1ha of land should be taken up to accommodate the expanding workforce and projected growth in employment, the actual land take up record will show that 3-4 ha will be allocated for this purpose. A number of reasons may underpin why this is the case including for example:

- That the Council or developers are land hoarding – this is not a 'cynical' approach to land planning rather it is fuelled by the fear of not securing sufficient land to meet (very uncertain) expected needs. This has been

endemic in Wales in the past not helped by the somewhat aggressive role of the (former) WDA

- Low confidence in the (past) land assessments which have been undertaken again raising uncertainty over the veracity of employment land estimates produced from studies and therefore fuelling the tendency towards accumulations and over-capacity of land stock
- Poor recording systems therefore clients not really fully 'up–to-speed' on the demand/supply dynamics of an area tending therefore to accumulate (surplus) stock
- Uncertain dynamics – there is clearly a link between a project announcement and the land take up records. However; there are major lags across some types of projects which means that the correlation between when stock uptake is recorded and when actual employment arrives on the ground is low. Put simply, the link between announcing a jobs project and actual recorded land take up will not be evident or indeed relevant in some cases.

9.7 We have therefore sought to understand whether and to what extent these issues are prevalent in Wrexham and Flintshire.

Wrexham

9.8 Annual employment land take up has been recorded by the Council for the period 1979/80-2012/13 and totals 341.61 ha. However, employment development patterns in the 1980s and 1990s were very different than today. For example, during much of the 1990s industrial and office development rates, across Wales and England, were inflated by the availability of a far greater range of grant regimes than exist today. Plot ratios and development densities have also changed as technology and working practices have updated. Reflecting this, the following section will only use take up data from 2000 onwards, which provides a better guide to current and projected future patterns of growth.

9.9 The results in Table 102 below take standard sectoral density and occupation patterns and model the expected land take up, taking account of the past employment results in the County Borough. We have deliberately taken a pre-recessionary period of this millennium (i.e. 2000-05) in order to establish what is more likely to be a steady state situation in the actual results. The results provided include:

- The growth requirement during the 2000-05 period – this is the scale of land that would have been demanded taking account of those growth only sectors noted in Table102 below
- The loss requirement – this is the scale of land that would have been 'released' taking account the scale of employment loss across sectors noted in Table 102 below
- The net requirement is the difference between (a) and (b).

9.10 This is then compared with data supplied by the Council on take-up (i.e. completions). The take-up results are estimated at two levels – actual completions for the period and a 3 year moving average estimate for completions. The latter is to accommodate some of the issues highlighted at paragraph 9.6 above.

Table 102 – Take-Up Scenarios for Wrexham (ha)

	Expected ELA requirement 2000-05	Total actual completions for the period 2000/01-05/06	3yr moving average 2000/01-05/06
a) Growth Requirement	20.53		
b) Loss 'Requirement'	-39.74		
Net Requirement	-19.21	23.4	25.2

Source: BE Group 2014

9.11 The results are highly interesting. The net land requirement for Wrexham during 2000/2001-2005/2006 (ending in March 2006) should have been -19.21 ha but the actual take-up was 23.4 ha; the moving average suggesting a significant disparity with the expected demand. However where we observe the expected growth requirement associated with employment growth during this period then the difference with the actual take up levels is very small in relative terms – between 15 and 20 percent. In other words it would seem to suggest that the forecast base for Wrexham taking account of current practices would be best served by concentrating on aggregate growth only – not net growth.

Flintshire

9.12 Annual employment land take up has been recorded by the Council for the period 1989/90-2013/14 and totals 290.62 ha. Again however, pre-2000 data is felt to be an unreliable guide to present and projected future patterns of growth.

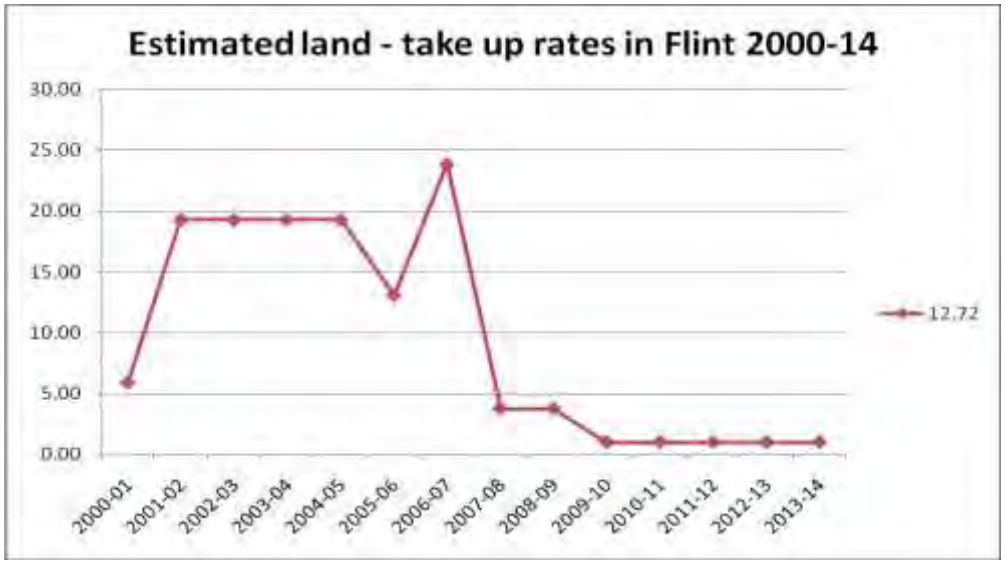
9.13 The results in Table 103 below take standard sectoral density and occupation patterns and model the expected land take up, taking account of the past employment results in the County. We have deliberately taken a pre-recessionary period of this millennium (i.e. 2000-05) in order to establish what is more likely to be a steady state situation in the actual results. The result provided include:

- The growth requirement during the 2000-05 period – this is the scale of land that would have been demanded taking account of those growth only sectors noted in Table 103 below
- The loss requirement – this is the scale of land that would have been 'released' taking account the scale of employment loss across sectors noted in Table 103 below
- The net requirement is the difference between (a) and (b).

9.14 This is then compared with data supplied by the Council on take-up (i.e. completions). The take-up results are estimated at two levels – actual completions for the period and a 3 year moving average estimate for completions. The latter is to accommodate some of the issues highlighted (i.e. poor recording systems and uncertain dynamics.

9.15 As precursor to the results however Figure 2 below shows the trends in land take up in Flintshire since 2000. Not all data points have been available for this purpose therefore we have averaged out the data for some years. However the results are very instructive in terms of illustrating that land take-up has decreased significantly over the recessionary period.

Figure 2 – Estimated Land Take-Up Rates in Flintshire 2000-2024



Source: Flintshire County Council, 2014

9.16 The average long term take up levels in Flintshire has been 12 ha a year. Since 2000 the average take-up rate has reduced to just over 9 ha. Over the last 5 years of recession, less than 1 ha a year has been taken up. As a first point therefore, we need to be aware of this dramatic decline in the rate of take-up and in turn we need to take extra care with taking account of average historical land take up. That said the analysis below is helpful in understanding whether these changes are supported by correlated changes in employment. The results below seem to suggest this.

Table 103 – Take-Up Scenarios for Flintshire (ha)

	Expected ELA requirement 2000-05	Total actual completions for the period 2000/01-05/06	3yr moving average 2000/01-05/06
a) Growth Requirement	65.12		
b) Loss 'Requirement'	-0.68		
Net Requirement	64.44	83.04	73.44

Source: BE Group 2014

9.17 The results are again interesting. The net land requirement for Flintshire during 2000-05 should have been 64.44 ha but the actual take-up was 83.04 ha; the moving average suggesting a slightly lower disparity with the expected demand. Importantly again the growth requirement is closer to the actual results as with Wrexham.

9.18 However where we were to suggest a 10 percent contingency in the completed land take-up levels then clearly in the 3 year moving average we are running very close to expectations (i.e. 66 ha against the expected 6.4 ha). In turn these results, using a very generalised model, provides us with a significant degree of comfort at least in terms of forecasting the past results. However the recent trends in take up provides a very stark contrast and, noting the earlier comments, one still needs to be very guarded with extrapolating on the basis of these outcomes.

9.19 Table 104 below provides results for the period 2005-11 using the standard model – noting here that we believe that this is an 'outlier' period and potentially very unreliable as a forecasting base.

Table 104 – Take-Up Scenarios for Flintshire, Incorporating the Recessionary Period (ha)

	Expected ELA requirement 2005-11	Total actual completions for the period 2005/06 - 11	3yr moving average 2005/06 - 11
Growth Requirement (ha)	54.28		
Loss 'Requirement' (ha)	-30.69		
Net Requirement (ha)	23.6	47.50	65.8

Source: BE Group 2014

9.20 The interesting result here is that the growth estimate (as in the initial example) providing the more sensible estimate which in this case fits in between the actual and moving average. The net estimate almost reverting to type where the actual results running some 2 -3 times the forecast. However this does seem to suggest that the focus should be on estimating a growth forecast (as per Wrexham) although we also need to be very mindful of the recent trend.

Forecasts for Wrexham

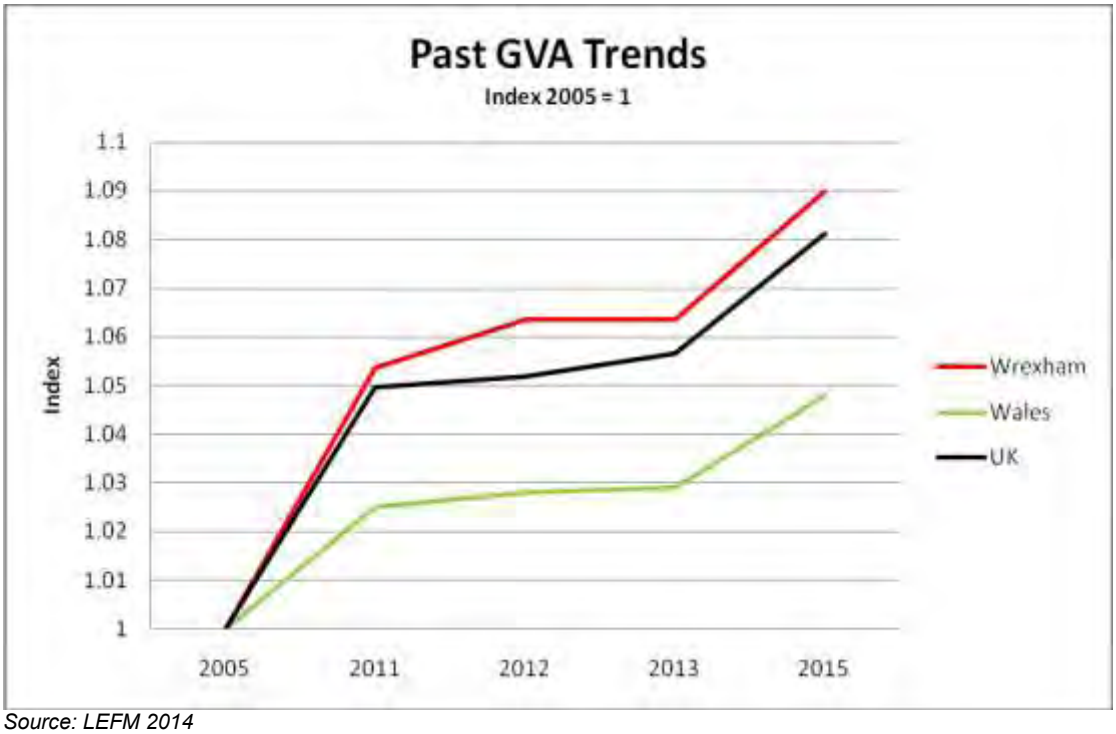
9.21 The following analyses the current forecasts for Wrexham. The data underpinning this section is supplied by Cambridge Econometrics which has been commissioned specifically for this exercise. It therefore presents the most up to date independent forecasts available for the County Borough.

GVA and Employment Trends

9.22 The overall trends in real GVA since 2005 provides us with a very clear difference between the resilience of the local economy in Wrexham and that for Wales. Figure 3 below indicates that Wrexham has, in GVA terms at least, more than matched the UK average growth since 2005 and through the height of the recession. Growth of almost 9 percent is recorded over the past 9 years to 2014, and projected on to 2015.

9.23 This compares with growth of around 4.75 percent for Wales during the same period, almost half the rate of growth in Wrexham. It is also evident here that Wrexham stalled rather than regressed during the height of the recession, with growth matching the UK growth rate over the 2011-2014 period. Similarly, in terms of past trends in employment (shown in Figure 4 below) Wrexham was largely unaffected by recession until 2012, which would suggest a degree of lag in recessionary effects at least in employment terms. Employment growth in Wrexham reduced sharply after 2012 and the projected growth rate for 2013-15 barely a third of a percent compared to almost 1 percent for the rest of the UK.

Figure 3 – GVA Trends in Wrexham

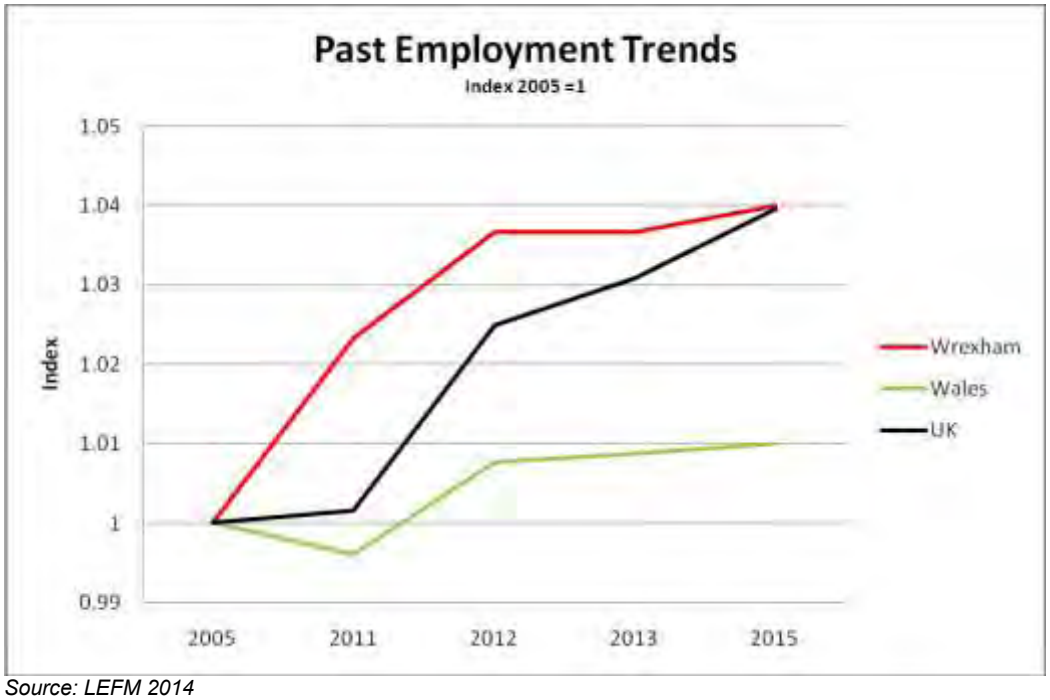


Source: LEFM 2014

9.24 Therefore what this analysis appears to be telling us is that Wrexham has a buoyant and indeed resilient economy which (as with Flintshire) is linked closely to the

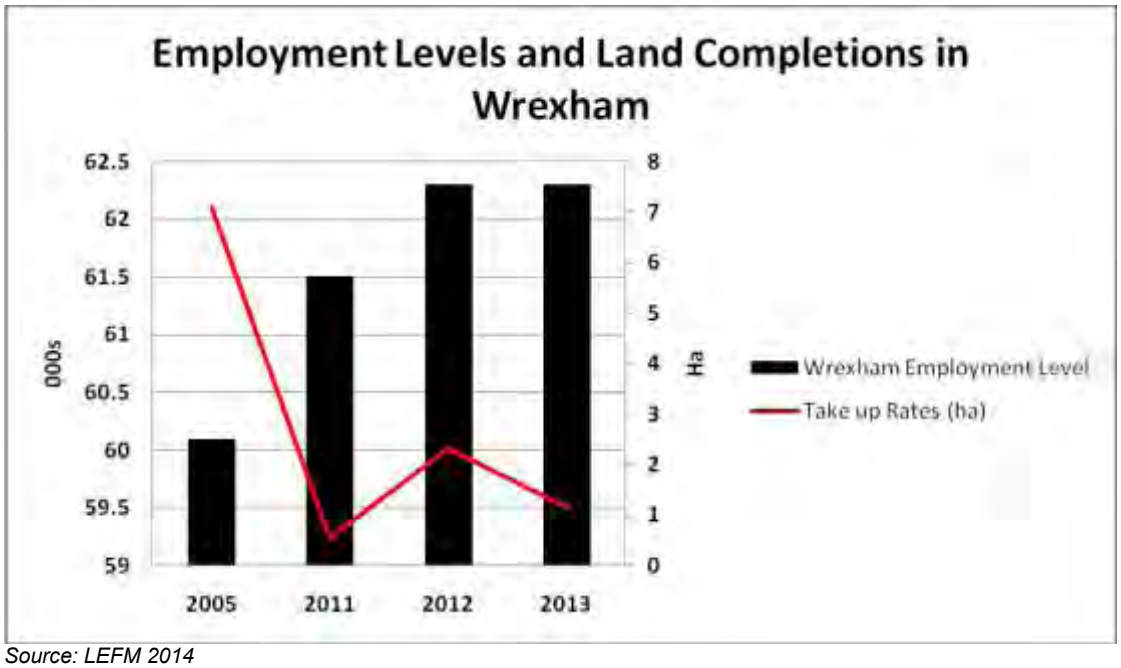
vibrant West Cheshire economy. However, there is some concern over short term prospects given the way employment growth has abruptly slowed down, with much weaker growth projected for the next few years. For this reason Figures 4 and 5 below consider the near term changes that have taken place in terms of employment growth levels and land completions.

Figure 4 – Past Employment Trends in Wrexham



Source: LEFM 2014

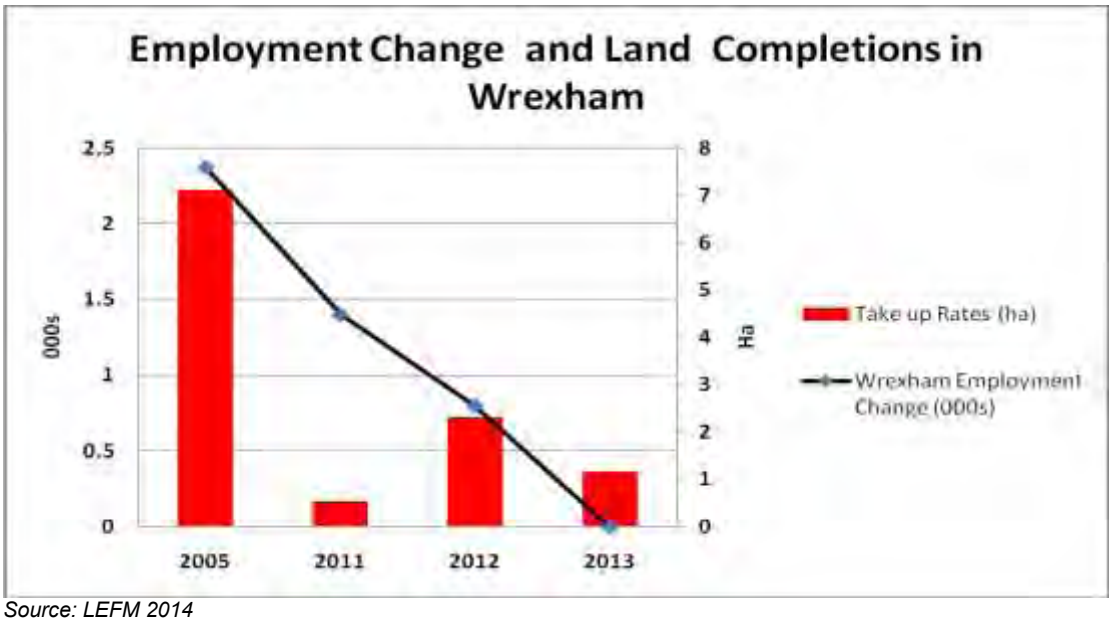
Figure 5 –Employment Levels and Land Completions in Wrexham



Source: LEFM 2014

9.25 Figure 5 first shows the correlation between recent overall trends in employment levels and land completions. It shows a dramatic fall in land completions against an apparent upward trend in employment levels. One could easily interpret these results in term of employment and completions moving in opposite directions. However Figure 6 below provides a more definite assessment of these trends.

Figure 6 – Employment Change and Land Completions in Wrexham



Source: LEFM 2014

9.26 Here we can quite clearly see that it is the **change** in employment that matters in terms of understanding the dynamics with land completions. This again reinforces what was said earlier concerning the need to observe growth in employment to calibrate the level of land required going forward. What is also important here is that the completions are moving positively with employment change. This provides therefore the level of reassurance required in estimating the land requirements subject to accurate forecasts.

9.27 The sectors in which employment has changed most significantly over the 2005-2015 period and, based on the positive correlation between employment change and land take-up, the sectors which are going to be material to the land assessment results are shown in Table 105.

Table 105 – Employment Change by Sector, 2005-2015 (000s)

Sub-Sector	2005	2015	Percentage Change 2005-2015 (percent)
3 Food, drink and tobacco	2.3	2.7	15.84
4 Textiles	0.2	0.5	163.79
10 Non-metallic mineral products	1.8	2.3	27.66
12 Electronics	0.5	0.6	23.57
14 Machinery, etc	0.3	0.3	7.01
17 Other manufacturing and repair	1.2	1.4	9.76
18 Electricity and gas	0.2	0.6	148.22
21 Motor vehicles trade	1.0	1.0	8.34
27 Warehousing and postal	0.7	0.9	16.26
28 Accommodation	0.6	1.1	81.55
30 Media	0.2	0.3	110.87
35 Head offices and management consultancy	0.4	0.4	5.47
37 Other professional services	0.4	0.9	117.14
38 Business support services	3.3	5.0	49.21
39 PAD	2.3	2.8	20.80
40 Education	4.2	5.8	39.30
41 Health	5.1	6.9	33.68
42 Residential and social	3.6	4.8	30.84
45 Other services	1.5	1.7	9.35
Total	**60.1**	**62.5**	**4.01**

Source: LEFM 2014

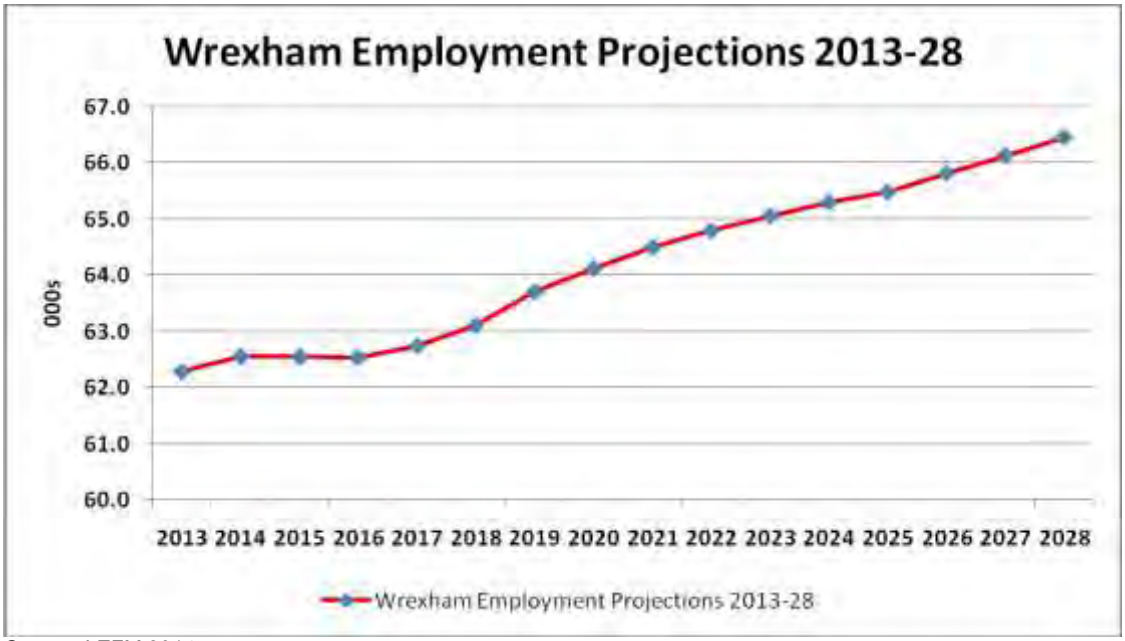
9.28 As Table 109 shows there are a mix of sectors which have demonstrated employment increases over 2005-2015. In absolute terms the key contributors to growth are the public sector (most prominently Health and Education) and business support services, along with the residential and social services sectors. Accommodation services and food and drink are also prominent contributors to growth, providing over 500 jobs during the period.

Forecast Land Assessment

9.29 Wrexham has the planning period 2013-28. The overall forecast employment growth for this period is shown in Figure 7. This shows that a steady rate of employment growth will resume after 2016, following a very small contraction in employment over

2014-2016. Projected employment growth in the LEFM over this period is 6.7 percent or 4,200 jobs in total. This is a net growth figure comprising employment projections in growth sectors, less sectors expected to decline (see Tables 110-112).

Figure 7 – Wrexham Employment Projections 2013-28



Source: LEFM 2014

9.30 The sectors which are projected to drive this growth of 4,200 jobs are set out in Table 106. More modest growth has been identified in four additional sectors, which are set out in Table 107 below. As can be seen, there is a strong link between the pre and post recessionary forecasts in that these sectors are in general the very same sectors that have been performing well since 2005 (as shown in Table 105 above). However the one clear difference between these two sets of results is the absence of any projected growth in the manufacturing sector for the forecast period.

Table 106 – Sectors Projected to Grow to 2028 (000s)

Sub-Sector	2013	2028	Percentage change 2013-2028 (percent)	Actual Change
18 Electricity and gas	0.6	0.6	14.01	0.1
20 Construction	3.2	3.6	13.13	0.4
21 Motor vehicles trade	1.0	1.1	7.13	0.1
22 Wholesale trade	1.3	1.5	13.05	0.2
28 Accommodation	0.9	1.6	78.37	0.7
29 Food & beverage services	2.7	3.6	34.99	0.9

Sub-Sector	2013	2028	Percentage change 2013-2028 (percent)	Actual Change
33 Real estate	0.3	0.4	36.14	0.1
34 Legal & accounting	0.3	0.4	17.57	0.1
35 Head offices and management consultancy	0.4	0.7	84.02	0.3
36 Architecture and engineering. services	0.6	0.6	12.88	0.1
37 Other professional services	0.9	1.0	20.69	0.2
38 Business support services	4.7	5.7	21.01	1.0
39 PAD	2.6	3.3	26.30	0.7
40 Education	5.6	7.1	25.51	1.4
41 Health	6.9	8.9	29.15	2.0

Source: LEFM 2014

Table 107 – Sectors Projected to show Modest Growth to 2028 (000s)

Sub-Sector	2013	2028	Percentage change 2013-2028 (percent)	Actual Change
19 Water, sewerage and waste	0.6	0.6	2.11	0.0
30 Media	0.3	0.4	5.39	0.0
31 IT services	0.3	0.3	2.51	0.0
45 Other services	1.7	1.8	3.99	0.1

Source: LEFM 2014

9.31 Table 108 below outlines the results for the manufacturing sectors – every one of which is expected to contract in employment terms at least over 2013-2028.

Table 108 – Sectors Projected to Decline to 2028 (000s)

Sub-Sector	2013	2028	Percentage change 2013-2028(percent)	Actual Change
1 Agriculture etc	1.3	1.0	-23.25	-0.3
2 Mining and quarrying	0.0	0.0	-51.67	0.0
3 Food, drink and tobacco	2.8	2.5	-11.06	-0.3
4 Textiles, etc.	0.4	0.2	-58.10	-0.2
5 Wood and paper	1.0	0.8	-19.50	-0.2
6 Printing and recording	0.1	0.1	-24.87	0.0
8 Chemicals, etc	0.2	0.1	-35.02	-0.1
9 Pharmaceuticals	0.3	0.3	-0.95	0.0
10 Non-metallic mineral products	2.6	1.2	-52.18	-1.3

Sub-Sector	2013	2028	Percentage change 2013-2028(percent)	Actual Change
11 Metals and metal products.	0.7	0.6	-15.20	-0.1
12 Electronics	0.7	0.5	-31.78	-0.2
13 Electrical equipment	0.4	0.3	-5.93	0.0
14 Machinery, etc	0.3	0.3	-6.39	0.0
15 Motor vehicles, etc	0.6	0.2	-67.16	-0.4
16 Other transport. equipment	0.3	0.3	-5.78	0.0
17 Other manufacture and repair	1.4	1.3	-3.05	0.0

Source: LEFM 2014

Forecast Land Employment Assessment

9.32 This forecast employment model conforms to the latest policy guidance, occupation and employment forecasts. Reflecting the study brief and conforming to the forecast period for Flintshire, the forecast land assessment covers the period 2013-30, rather that the plan period of 2013-2028. Increasing the forecast period by two years means that employment growth increases slightly to just under 5,000 or 7.8 percent over this 17 year period. This is spread across those sectors already highlighted as contributing to local performance.

9.33 Table 109 below provides the results of the baseline land assessment forecast.

Table 109 – Baseline Assessment Forecast for the Period 2013-2030

Sectors	Employment Change 2013-2030	Percentage Occupying B1, B2, B8 Floorspace	No. of jobs	Average density (B1,B2,B8 Floorspace per person, sqm)	Net Requirement (sqm)
Growth Sectors					
Construction	426	26	110.76	21	2,325.96
Retail, Distribution, Hotels & Restaurants	1,769	48	849.12	67.4	5,7230.69
Financial, Professional & Other Business Services	1,832	100	1832	21	3,8472
Government & Other Services	4,635	22	1019.7	21	2,1413.7
Total from Growth Sectors					***119,442.35***
Land requirement at 3,400 sqm per hectare (ha)					**35.13**

Sectors	Employment Change 2013-2030	Percentage Occupying B1, B2, B8 Floorspace	No. of jobs	Average density (B1,B2,B8 Floorspace per person, sqm)	Net Requirement (sqm)
Declining Sectors					
Agriculture	-329	5	-16.45	21	-345.45
Manufacturing (all sectors)	-3,225	100	-3225	41.1	-132548
Transport & Communications	-156	48	-74.88	67.4	-5046.91
Total from Declining Sectors					***-137,940.36***
Negative land requirement at 3,400 sqm per hectare (ha)					**-40.57**
Net Total (Requirement from sectors projected to grow less that from those projected to decline)					**-18,498.01**
Land requirement at 3,400 sqm per hectare (ha)					**-5.44**

Source: BE Group 2014

9.34 The analysis suggests that given the projected change in employment in the county forecast over the next 17 years the projected net land requirement is actually negative at -5.4ha. This is linked mainly to the contraction in manufacturing employment which will (negatively) bias the land requirement. However we have strongly argued and evidenced that it is the measure of growth which has largely determined the take up of employment land in Wrexham. To this effect Table 110 below provides us with this assessment.

Table 110 – Baseline Assessment Summary

	Baseline (2013-30)	Benchmark (average at 3.9 ha pa)
Growth Requirement	35.13	
Loss 'Requirement'	-40.57	
Net Requirement	-5.44	66

Source: BE Group 2014

9.35 This would suggest therefore that to accommodate the growth requirement for Wrexham, around 35 ha is required to 2030, or 2.06 ha/year. Benchmarking on the basis of the 10 year average since 2003 would appear to yield too high a land allocation given the forecasts here. However, the employment forecasts suggest a continuation of pre-recession growth for the LDP period for Wrexham – but also governed by a degree of de-industrialisation towards more public and other services in the area. In this regard caution is clearly required in terms of the full conversion of

jobs in the public sector into land requirement and would therefore indicate that the lower baseline estimate would be reflective in this regards.

9.36 From these results there are therefore potentially three options emerging:

- That a net negative land allocation is required for the 2013-2030 period according to the baseline requirement of -5.4 ha in total
- That a baseline growth requirement of 35 ha is required (2.06 ha/year)
- That an alternative growth requirement, consistent with the past average take-up levels, is required which would give between 60 – 70 ha requirement over the period (say 4 ha/year).

9.37 The weight of the evidence would point towards taking the baseline growth estimate – 2.06 ha/year – although a more optimistic / contingent approach would allocate between 2-3 ha/year taking account of past performance and the benchmark levels. As with Flintshire this is not consistent with the baseline net assessment but there is consistency between what is required with regards to the scale of employment growth – and this appears to be consistent with the calculations for the past trend in Wrexham (i.e. that completions follow the expected land requirements according to the scale of employment growth). Moreover where there is sectoral switch between what is retrenching and what is growing then clearly transferability of land and space may not be possible which de facto implies new space.

9.38 If this allocation was split solely between the sectors projected to grow, then the division would be as follows (Table 111). This shows the annual growth of 2.5ha. N.B. Whilst non B class uses are shown, the land requirement is for B1, B2 B8 uses only as set out in Table 109.

Table 111 – Land Allocation – Indicative Split by Growth Sectors

Sector	Scale (ha)	Designation
Construction	0.05	B8
Retail, Distribution, Hotels & Restaurants	1.2	A1/A3/C1/B8
Financial, Professional & Other Business Services	0.80	A2/B1
Government & Other Services	0.45	B1
Total	**2.5**	

Source: BE Group 2014

Health and Education – Wrexham

9.39 Forecasting indicates that employment in the health sector will increase by some 2,300 jobs between 2013 and 2030, to 9,200. Education will increase by some 1,700 jobs over the same period, to 7,300.

9.40 There is no defined way to know the total additional floorspace which these additional jobs will require, however, standard job:floorspace density rates (derived from the Employment Densities Guide 2nd Edition 2010) suggest an average density of 40 sqm per job for education and health related uses. This suggests that 92,000 sqm of additional health related floorspace will be required to 2030 and 68,000 sqm of education related floorspace. At 3,400 sqm per hectare this suggests a need for 27.06 ha of additional health related land and 20.00 ha of land for education related uses. Standard proportions suggest that around 22 percent of this land need could be in the form of B1/B2/B8 employment land (i.e. 5.95 ha for health uses and 4.40 ha for education) and the rest suited to more specialist uses, i.e. schools, colleges, hospitals and clinics. However, as is discussed above, the real proportion of B1/B2/B8 use could be much higher, up to three quarters (i.e. 20.29 ha for health uses and 15.00 ha for education).

9.41 For clarity, the B1/B2/B8 land need suggested here has also been included in the broader land need calculations discussed above. It should not therefore be considered as an additional land requirement.

Forecasts for Flintshire

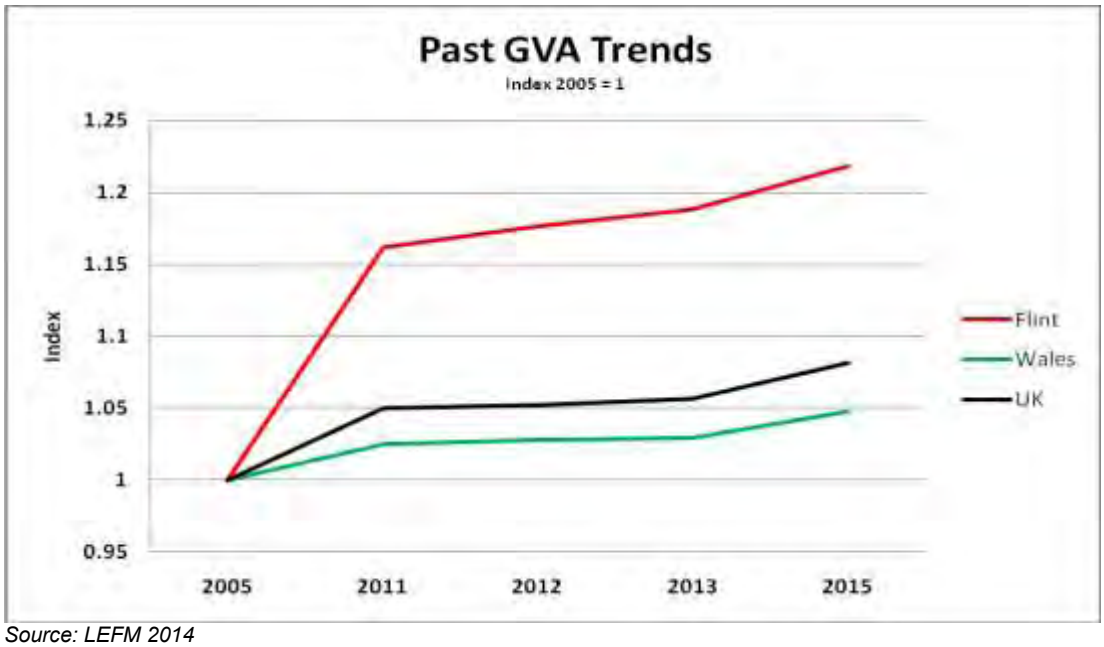
9.42 The following analyses the current forecasts for Flintshire. The data underpinning this section is supplied by Cambridge Econometric which has been commissioned specifically for this exercise. It therefore presents the most up to date independent forecasts available for the County.

GVA and Employment Trends

9.43 The overall trends in real GVA since 2005 provides us with a very clear difference between the resilience of the local economy in Flintshire and that for Wales. Figure 8 below indicates that Flintshire has, in GVA terms at least, far outstripped the UK (and Wales) average growth since 2005 and through the height of the recession. This performance is prolific in the circumstances and even significantly surpasses

Wrexham's creditable performance during the same period. Growth of almost 22 percent is recorded over the past 9 years to 2014, and projected on to 2015.

Figure 8 – GVA Trends in Flintshire

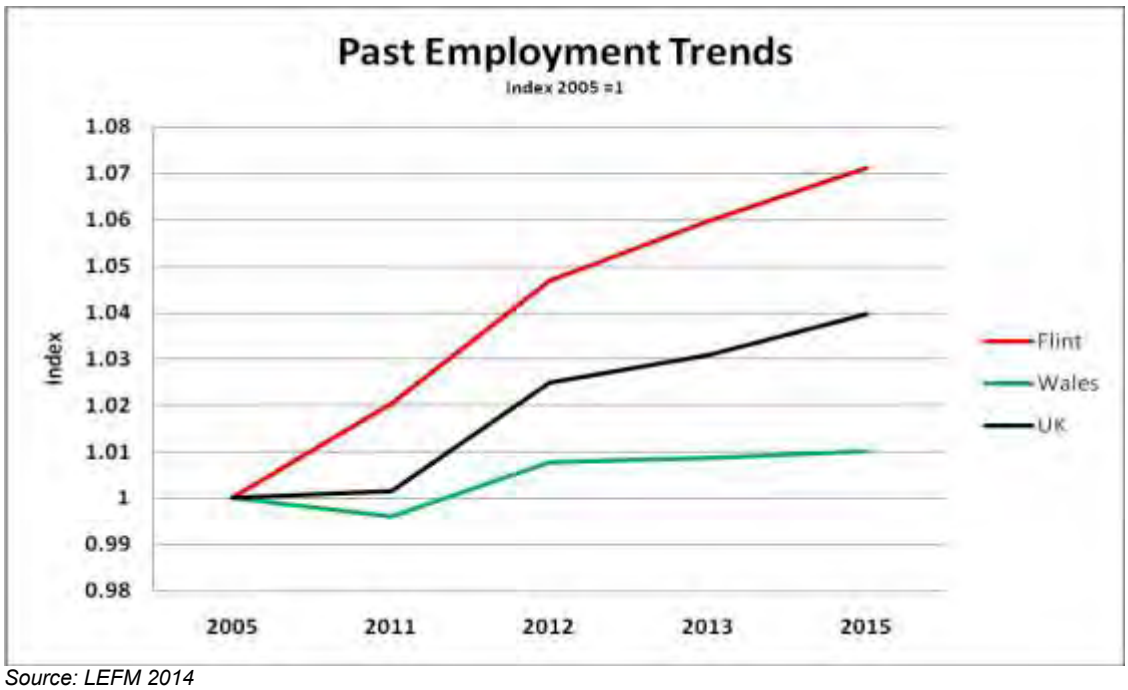


Source: LEFM 2014

9.44 This compares with growth of around 4.75 percent for Wales during the same period – only a fifth of the rate of growth in Flintshire. As with Wrexham it is evident here that Flintshire stalled rather than regressed during the height of the recession, with the County enjoying at least some growth throughout. Short term projected growth, to 2015, is also expected to at least match the UK growth rate. As Figure 9 below shows, overall employment rates in Flintshire were also largely unaffected by recession, showing over 7 percent growth, something projected to continue into 2015.

9.45 Therefore what this analysis appears to be telling us is that Flintshire has a very buoyant and indeed resilient economy (as with Wrexham), is linked closely to the vibrant West Cheshire economy which is also very reflective in this respects. Whilst the overall pattern of growth is similar to Wrexham it is also evident that there is a significant difference in scale between the two areas in real terms, indeed Flintshire's recent performance is nothing short of outstanding considering the recessionary effects more generally in the UK. GVA growth is around 2.5 times higher than Wrexham for this particular forecast period and employment growth approaching twice the rate.

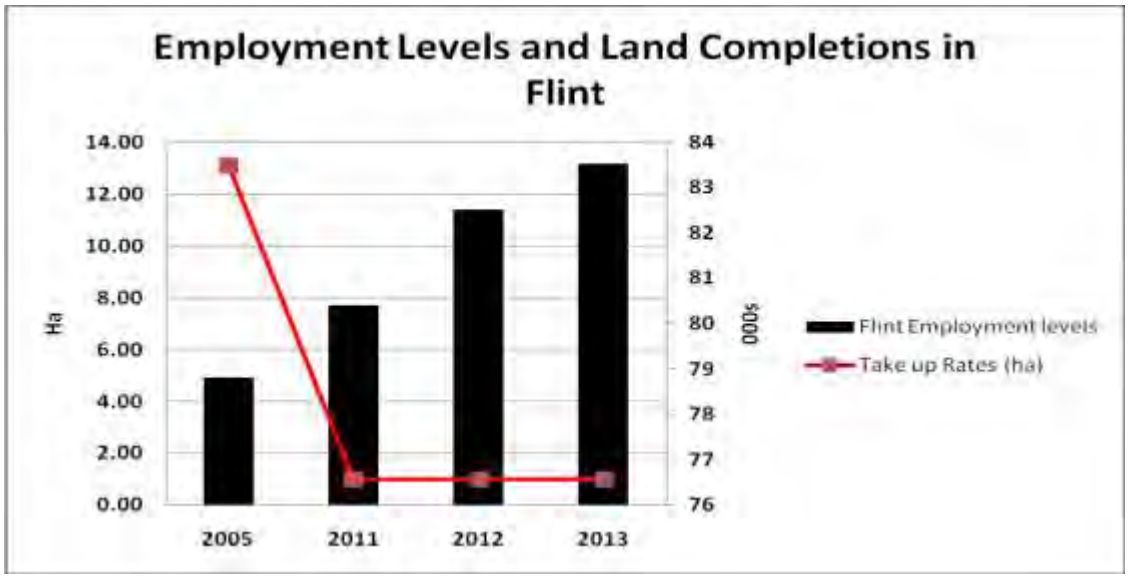
Figure 9 – Past Employment Trends in Flintshire



Source: LEFM 2014

9.46 However, it is also observed that actual completion levels have plummeted in the County since the start of the recession. To this effect, Figures 10 and 11 below provides some hard evidence in terms of the near term changes that have taken place in terms of employment growth levels and land completions – but also show how important it is to explore the dynamics behind these changes.

Figure 10 – Employment Levels and Land Completions in Flintshire

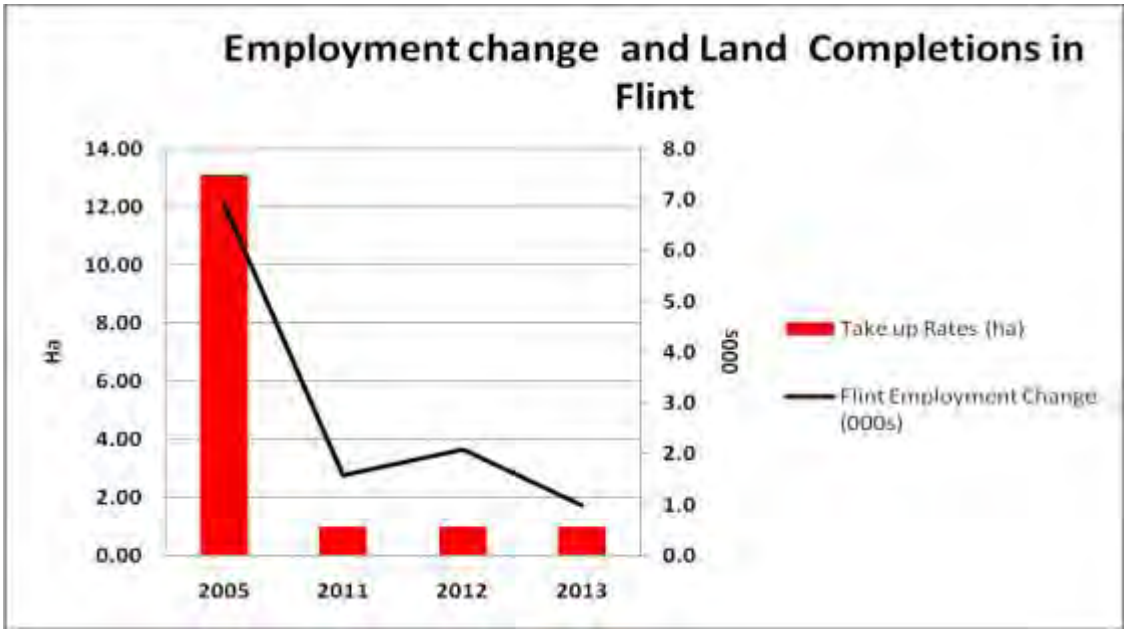


Source: LEFM 2014

9.47 Figure 10 first shows the correlation between recent overall trends in employment and land completions. It shows a dramatic fall in land completions against an apparent upward trend in employment levels. One could easily interpret these results in term of employment and land completions moving in opposite directions. However, Figure 11 below provides a more definite assessment of these trends.

9.48 Here, as in the case with Wrexham, we can quite clearly see that it is the change in employment that matters in terms of understanding the dynamics with land completions. This again reinforces what was said earlier concerning the need to observe growth is employment to calibrate the level of land required going forward. What is also important here is that the completions are moving positively with employment change. This provides therefore the level of reassurance required in estimating the land requirements subject to accurate forecasts. It should also be noted that the average rate of completions has all but halved since 2005 compared to an average since 2000 and this may be symptomatic of a number of factors including sectoral diversification, better recording and land management, etc, - not just a change in employment. However there is prima facie case here to develop the projections with a focus on growth – a theme which is consistent throughout all the results.

Figure 11 – Employment Change and Land Completions in Flintshire



Source: LEFM 2014

9.49 The sectors in which employment has changed most significantly over the 2005-2015 period and, based on the positive correlation between employment change and land take-up, the sectors which are going to be material to the land assessment results are shown in Table 112.

9.50 As Table 112 shows there is a mix of sectors which have demonstrated employment increases over 2005-2015. The key contributors to growth are the public sectors services (i.e. most prominently PAD and education) and business support services posting a very large increase during this period. Also professional services and media appear to have performed well, as has air transport, albeit from a very small base. Other manufacturing and repair have also delivered high percentage and absolute growth. With this scope of sectors including some high density businesses (e.g. manufacturing) then, whilst growth has certainly tempered near term, a recovery period would expect to see these sectors also contributing to future land requirements (though it's unclear whether this would achieve the longer term average given these more immediate results).

Table 112 – Employment Change by Sector, 2005-2015 (000s)

Sub-Sector	2005	2015	Percentage Change 2005-2015 (percent)*
3 Food, drink and tobacco	3.2	4.1	29.69
16 Other transport equipment	6.2	6.9	11.79
17 Other manufacturing and repair	1.9	3.3	75.33
18 Electricity and gas	0.3	0.4	22.29
26 Air transport	0.0	0.1	194.76
27 Warehousing and postal	0.8	1.4	63.10
30 Media	0.8	1.8	118.84
31 IT services	0.6	1.0	85.18
36 Architecture and engineering services	0.9	1.5	68.52
37 Other professional services	0.9	2.4	157.48
38 Business support services	3.1	8.2	168.48
39 PAD	2.0	3.8	92.84
40 Education	5.3	6.4	20.93
42 Residential and social	2.2	3.0	41.08
43 Arts	0.2	0.3	87.49
44 Recreational services	0.7	1.1	61.82

Sub-Sector	2005	2015	Percentage Change 2005-2015 (percent)*
45 Other services	1.1	1.4	27.86

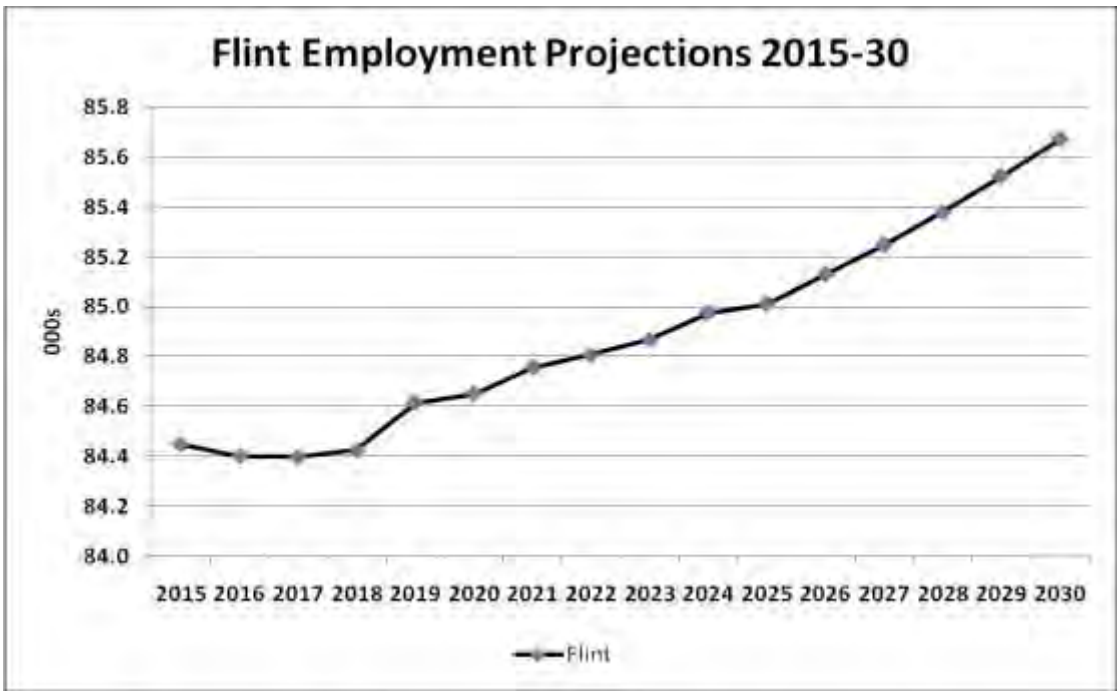
Source: LEFM 2014

**All percentage calculations are of actual, figures in the tables are rounded and therefore will differ to the results below.*

Forecast Land Assessment

9.51 Flintshire has the planning period 2015-30. The overall forecast employment growth for this period is shown in Figure 12. This shows – coinciding perhaps with the much reduced rate of completions – a projected near term decline in employment to 2017. Employment is therefore expected to resume a steady but much shallower growth rate beyond 2017. Overall employment growth over the 2015-30 period is expected to be only 1.4 percent or 1,200 in total which compared to the recent past is a major reduction in prospects. In number terms employment growth was nearly 5 times this forecast between 2005 and 2015. Thus, whilst positive this is a major change for the County's employment base prospects over the medium term.

Figure 12 - Flintshire Employment Projections 2015-30



Source: LEFM 2014

9.52 The sectors which are projected to drive this growth are set out in Table 113. More modest growth has been identified in one additional sector, which is set out in Table 120. There are very few major growth sectors within this group the exception

arguably being business services which has been performing well over the last 10 years or so. Food and beverage, construction professional services, management consulting and PAD are the other notable expected performers (i.e. generating more than 500 jobs over the next 15 years). Manufacturing is conspicuous by its absence (apart from food production) and one has to comment that these results are somewhat disappointing and possibly unexpected particularly given the County's performance during the recession. That said the employment impact of the recession on the County would appear to be lagged albeit land completions appears to correlate well with the observed trends.

9.53 There is a good link between the pre and post recessionary forecasts in that these sectors are in general similar to the sectors that have been performing well since 2005 (see Table 113). However there are differences not least the absence of the manufacturing sector and the predominance of the commercial services as well as public services (with less emphasis in health).

Table 113 – Sectors Projected to Grow to 2030 (000s)

Sub-Sector	2015	2030	Percentage change 2015-2030 (percent)	Actual Change
3 Food, drink and tobacco	4.1	4.3	3.27	0.1
18 Electricity and gas	0.4	0.4	5.52	0.0
20 Construction	5.9	6.8	14.90	0.9
21 Motor vehicles trade	1.4	1.5	5.36	0.1
26 Air transport	0.1	0.1	20.84	0.0
28 Accommodation	1.4	1.8	26.90	0.4
29 Food and beverage services	3.4	4.1	22.78	0.8
30 Media	1.8	2.0	7.30	0.1
31 IT services	1.0	1.2	18.90	0.2
33 Real estate	0.7	1.0	42.55	0.3
34 Legal & accounting	0.3	0.4	14.23	0.0
35 Head offices and management consultancy	0.8	1.3	63.43	0.5
36 Architecture and engineering services	1.5	1.9	28.01	0.4
37 Other professional services	2.4	2.9	20.00	0.5
38 Business support services	8.2	9.6	16.36	1.3
39 PAD	3.8	4.3	12.49	0.5

Sub-Sector	2015	2030	Percentage change 2015-2030 (percent)	Actual Change
40 Education	6.4	6.8	5.73	0.4
41 Health	1.5	1.7	12.82	0.2
42 Residential & social	3.0	3.1	3.28	0.1

Source: LEFM 2014

Table 114 –Sectors Projected to show Modest Growth to 2030 (000s)

Sub-Sector	2015	2030	Percentage change 2015-2030 (percent)	Actual Change
22 Wholesale trade	1.9	1.9	1.04	0.0

Source: LEFM 2014

9.54 To confirm this Table 115 below outlines all those sectors expected to contract. Given the role of the manufacturing sector in biasing the scale of land completions certainly in the earlier benchmark work (see above) coinciding with the sharp decline in completions and weak forecast growth then we would expect that the land assessment delivers considerably less allocations than has been in the past.

Table 115–Sectors Projected to Decline to 2030 (000s)

Sub-Sector	2015	2030	Percentage change 2015-2030 (percent)	Actual Change
1 Agriculture, etc.	1.0	0.7	-34.86	-0.4
2 Mining and quarrying	0.1	0.1	-40.15	0.0
4 Textiles, etc.	0.2	0.0	-79.47	-0.1
5 Wood and paper	1.4	1.0	-25.06	-0.3
6 Printing and recording	0.4	0.3	-13.49	0.0
7 Coke and petroleum	0.0	0.0	-33.33	0.0
8 Chemicals, etc.	1.5	1.4	-3.83	-0.1
10 Non-metallic mineral products	2.2	1.0	-56.65	-1.3
11 Metals and metal products	1.4	1.1	-18.15	-0.3
12 Electronics	0.3	0.1	-56.64	-0.2
13 Electrical equipment	0.1	0.1	-8.13	0.0
14 Machinery, etc.	0.3	0.2	-5.32	0.0
15 Motor vehicles, etc.	0.7	0.3	-49.41	-0.3
16 Other transport equipment	6.9	5.6	-19.22	-1.3
17 Other manufacturing and repair	3.3	3.1	-3.66	-0.1

Sub-Sector	2015	2030	Percentage change 2015-2030 (percent)	Actual Change
19 Water, sewerage and waste	1.2	1.1	-3.21	0.0
23 Retail trade	7.3	6.8	-7.92	-0.6
24 Land transport	1.3	1.2	-9.55	-0.1
27 Warehousing and postal	1.4	1.3	-6.30	-0.1
32 Financial and insurance	0.7	0.5	-18.63	-0.1
43 Arts	0.3	0.3	-20.92	-0.1
44 Recreational services	1.1	1.0	-13.76	-0.2
45 Other services	1.4	1.4	-0.15	0.0

Source: LEFM 2014

Forecast Land Employment Assessment

9.55 The forecast employment has been modelled in relation to the latest guidance and of course the information to hand including local job densities, occupation and employment forecasts. Table 116 below provides the results of the baseline forecast results which as indicated previously provided the most 'accurate' results reflective of past expected land completions.

Table 116 – Baseline Assessment Forecast

Sectors	Employment Change 2015-2030	Percentage Occupying B1, B2, B8 Floorspace	No. of jobs	Average density (B1,B2,B8 Floorspace per person, sqm)	Net Requirement (sqm)
Growth Sectors					
Construction	879	26	228.54	21	4,799.34
Retail, Distribution, Hotels & Restaurants	669	48	321.12	67.4	21,643.49
Transport & Communications	132	48	63.36	67.4	4,270.46
Financial, Professional & Other Business Services	2,951	100	2,951.00	21	61,971
Government & Other Services	918	22	201.96	21	4,241.16
Total from Growth Sectors					***96,925.45***
Land requirement at 3,400 sqm per hectare (ha)					**28.51**
Declining Sectors					
Agriculture	-401	5	-20.05	21	-421.05
Manufacturing (all sectors)	-3,925	100	-3925	41.1	-161318
Total from Declining Sectors					***-161,739.05***

Sectors	Employment Change 2015-2030	Percentage Occupying B1, B2, B8 Floorspace	No. of jobs	Average density (B1,B2,B8 Floorspace per person, sqm)	Net Requirement (sqm)
Negative land requirement at 3,400 sqm per hectare (ha)					**-47.57**
Net Total (Requirement from sectors projected to grow less that from those projected to decline)					-64,813.60
Land requirement at 3,400 sqm per hectare (ha)					-19.09

Source: BE Group 2014

9.56 The analysis suggests that given the projected change in employment in the County forecast over the next 15 years the projected net land requirement is actually negative at -19ha. This is linked mainly to the contraction in manufacturing employment which will (negatively) bias the land requirement. However we have strongly argued and evidenced that it is the measure of growth which has largely determined the take up of employment land in Flintshire. To this effect Table 117 below provides us with this assessment.

Table 117 – Baseline Assessment Summary

	Baseline (2015-30)	Benchmark (average at 5.5ha pa)
Growth Requirement	28.51	
Loss 'Requirement'	-47.57	
Net Requirement	-19.10	82.50

Source: BE Group 2014

9.57 This would suggest therefore that to accommodate the growth requirement for Flintshire around 28.5 ha is required to 2030, or 1.90 ha/year. Benchmarking on the basis of the 8 year average since 2005 would appear impossibly high given the forecasts here (although in relation to pre 2005 performance then this would be deemed low). However, the employment forecasts suggest a very different outcome for the LDP period for Flintshire – governed by a degree industrial transformation towards more services in the area.

9.58 From these results there are therefore potentially three options emerging:

- That a net negative land allocation is required for the 2015-30 period and a broad mid-point on these estimates would be the baseline requirement of -19.1 ha

- That a baseline growth requirement of 28.5 ha is required (1.9 ha/year)
- That alternative growth requirements consistent with the past average take-up levels is required which would give between 60 – 80 ha requirement over the period (say 4.5 ha/year).

9.59 The weight of the evidence would point towards taking the baseline growth estimate – 1.9 ha/year – although a more optimistic/contingent approach as well as acknowledging that the smaller land deals are no longer recorded then one would allocate between 2-3 ha/year. If this allocation was split solely between the sectors projected to grow, then the division would be as follows (Table 118).

Table 118 – Land Allocation – Indicative Split by Growth Sectors

Sector	Scale (ha)	Designation
Construction	0.12	B8
Retail, Distribution, Hotels & Restaurants	0.55	A1/A3/C1/B8
Transport & Communications	0.11	B8
Financial, Professional & Other Business Services	1.60	A2/B1
Government & Other Services	0.10	B1
Total	**2.5**	

Source: BE Group 2014

9.60 It should be noted that separate advice has been provided to Flintshire Council regarding growth scenarios factoring in the potential employment capacity within major projects, such as the Deeside Enterprise Zone and Warren Hall Business Park. This advice examines employment growth scenarios equating to land growth of approximately 2.1-3.4 ha/year.

Health and Education – Flintshire

9.61 Forecasting indicates that employment in the health sector will increase by a modest 200 jobs between 2015 and 2030, to 1,700. Education will increase by some 400 jobs over the same period, to 6,800.

9.62 There is no defined way to know the total additional floorspace which these additional jobs will require, however, standard job:floorspace density rates (derived from the Employment Densities Guide 2nd Edition 2010) suggest an average density of 40 sqm per job for education and health related uses. This suggests that 8,000 sqm of additional health related floorspace will be required to 2030 and 16,000 sqm of

education related floorspace. At 3,400 sqm per hectare this suggests a need for 2.35 ha of additional health related land and 4.71 ha of land for education related uses. Standard proportions suggest that around 22 percent of this land need could be in the form of B1/B2/B8 employment land (i.e. 0.52 ha for health uses and 1.04 ha for education) and the rest suited to more specialist uses, i.e. schools, Collegess, hospitals and clinics. However, as is discussed above, the real proportion of B1/B2/B8 use could be much higher, up to three quarters (i.e. 1.76 ha for health uses and 3.53 ha for education).

9.63 For clarity, the B1/B2/B8 land need suggested here has also been included in the broader land need calculations discussed above. It should not therefore be considered as an additional land requirement.

Household and Population Projections

9.64 The latest Welsh Government published household projections for Wales are 2011-based, published in 2014. These set out projections on an authority by authority basis showing the estimated increase in households based on population change and demographic change. The figures work from a base date of 2011.

9.65 The projections suggest the following population change for Wrexham and Flintshire. The figures provided by Welsh Government show the following growth for the respective Plan periods (Table 119).

Table 119 – Population Change to 2030

	2011 Baseline	2013	2015	2030	Total Increase	Percentage Change
Wrexham	135,070	137,617	-	157,562	19,945	14.5
Flintshire	152,666	-	154,115	155,844	17,29	1.12

Source: Welsh Government 2014 (Principal Projection)

9.66 Wrexham is forecast to have substantial population growth between 2013-2030 of almost 20,000 which is an increase of 14.5 per cent, whilst Flintshire is estimated to see minimal growth of just 1,729, or 1.12 per cent. Table 120 shows projections for household change.

Table 120 – Private Household Change to 2030

	2011 Baseline	2013	2015	2030	Total Increase	Percentage Change

Wrexham	57,141	58,494	-	69,391	10,897	18.6
Flintshire	63,852	-	65,271	68,710	3,439	5.26

Source: Welsh Government 2014 (Principal Projection)

9.67 The changes in household numbers in both cases, do not grow directly in line with the expected population growth. This reflects the changing demographic and household make-up across different areas. Wrexham will see a steady growth which is ahead of the national growth expectations which suggest a 15 per cent increase to 2030. Flintshire is not likely to see the same level of growth, with a 5.26 per cent increase during the Plan period, but interestingly, household numbers are expected to increase at around double the actual population growth levels. The national trend is growth from single person households which would account for the variance of figures particularly in Flintshire.

9.68 Labour supply growth reflects population growth, whereas the employment forecasts reflect labour demand. The importance of these two sets of figures is to ensure that where there is a forecast increase in employment needs, then the current and future population can meet those needs, or conversely, if the population is set to grow, then economic growth can provide the needed jobs. Factors such as current levels of unemployment, skills gaps and migration in and out of the authority areas will influence the need for employment growth to match population growth.

9.69 Flintshire has a net projected employment growth of 1,223 during the Plan period, thus with a current unemployment rate of 6.2 per cent, the forecasts do not suggest that employment and population growth are showing any significant divergence. Furthermore, it is estimated that 41 per cent of the working population commute out of Flintshire.

9.70 Wrexham has a net projected employment growth of 4,952 during the Plan period compared to a total population growth of just under 20,000. This suggests that the resident population is set to grow at a greater rate than the working population.

9.71 In employment land forecast terms, there is unlikely to be any impact on the forecast recommendations for Flintshire. For Wrexham, the question that arises is whether the increase in population, will impact on the need for additional jobs. Cambridge Econometrics in forecasting have modelled the effect on overall growth, whilst the overall population will increase almost fourfold over the labour demand, it must be remembered that labour supply will come from only a proportion of the total increase,

namely the working age population. In percentage terms, the overall jobs growth forecast for Wrexham is 7.87 percent, around half of the population growth forecast.

9.72 This forecast growth in overall population supports the findings that to rely on net jobs growth alone would reflect a pessimistic approach to growth in Wrexham, and that the proposal to take a realistic level of 2-3 ha per annum is supported by population growth statistics from Welsh Government. i.e. the latest Welsh Government figures show a labour market growth of 10,897 against projected growth in jobs created of 4,952, but in providing for employment land, the forecasting model suggests a land need that would exceed these levels, and will allow for higher growth within Wrexham.

9.73 It should be noted that this represents an indicative comparison that does not, for example, take account of the impact of the actual working age population and potential changes in commuting patterns. There is a need for further research to bridge these gaps and produce more comprehensive linked figures.

North Wales Regional Employment Land Strategy

9.74 The 2014 North Wales Regional Employment Land Strategy forecast's a North Wales wide employment land requirement of 46.30 ha on the baseline scenario and 55.16 ha on a high growth scenario. This is based on growth projections for nine key sectors:

- Advanced Materials and Manufacturing
- Construction
- Creative Industries
- Energy and Environment
- Finance and Professional Services
- Food and Farming
- ICT
- Life Sciences
- Tourism.

9.75 The study projects jobs growth in these sectors over the period 2014-2031 using Experian forecasts. As with the LEFM model used in this study, Experian forecast a decrease in manufacturing (a drop of 6,325 jobs) and agricultural employment. In

comparison construction (2,718 more jobs), energy and environment (1,570 more jobs) and tourism (3,603 more jobs) will all see strong employment growth over the next 17 years.

9.76 However, the Regional Employment Land Strategy does not break down this land requirement by local authority area. Thus it is not possible to meaningfully compare Employment Land Strategy's results with the findings of this study which focus solely on Wrexham and Flintshire and use different employment forecasts (Cambridge Econometrics against Experian) as their base.

Summary

Wrexham Employment Land Need

9.77 Forecast analysis suggests a net negative land requirement of -5.4ha over the next 17 years up to 2030. This is linked mainly to the projected contraction in manufacturing employment which will (negatively) bias the land requirement. However, as this section has argued it is the measure of growth which has largely determined the past take up of employment land in Wrexham.

9.78 The identified requirement, from sectors projected to grow to 2030, is around 35 ha or 2.06 ha/year. The alternative approach, benchmarking on the basis of the 10 year average take up rate since 2003 (which gives a figure of 66 ha or 3.9 ha/year) would appear to yield too high a land allocation given the forecasts.

9.79 However, the employment forecasts suggest a continuation of pre-recession growth for the LDP period for Wrexham – but also governed by a degree de-industrialisation towards more public and other services in the area. In this regard caution is clearly required in terms of the full conversion of jobs in the public sector into land requirement and would therefore indicate that the lower baseline estimate would be reflective in this regards (see Table 121).

Table 121 – Baseline Assessment Summary

	Baseline
Growth Requirement	35.13
Loss 'Requirement'	-40.57
Net Requirement	-5.44

Source: BE Group 2014

9.80 From these results there are three land need options:

- That a net negative land allocation is required for the 2013-30 period according to the baseline (low growth) requirement, -5.4 ha in total
- That a high growth requirement of 35 ha is required (2.06 ha/year) based on sectors projected to grow
- An alternative growth requirement, consistent with the past average take-up levels, is required which would give requirement of 60 – 70 ha over the period (some 4 ha/year).

9.81 The weight of the evidence would point towards taking the high growth estimate – 2.06 ha/year – although a more optimistic approach would allocate between 2-3 ha/year taking account of past performance and the benchmark levels. As Table 122 shows, under all three scenarios Wrexham maintains a land surplus when measured against its 2014 realistic land supply (from Section 6.0). However, in the case of Long Term Land Take-up that surplus is a comparatively modest 13.75 ha.

Table 122 – Land Forecast Options – Wrexham

Model	Existing Land/ Stock 2014[1], ha	Land Need 2013 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	80.05	-5.44	85.49	Net requirement based on projected growth/reduction of employment in industry sectors
High Growth Requirement	80.05	35.13	44.92	Based on projected growth of employment in industry sectors
Long Term Land Take-up	80.05	66.30	13.75	At an average take-up rate of 3.9 ha/year

Source: BE Group 2014

[1] N.B. Realistic headline supply at 31 March 2014

Flintshire Employment Land Need

9.82 Forecast analysis suggests a net negative land requirement of -19ha over the next 17 years. Again this reflects projected contractions in the manufacturing sector. However, looking at sectors projected to grow gives a positive requirement of 38.5 ha is required to 2030, or 1.90 ha/year.

9.83 Benchmarking against an 8 year average take up rate since 2005 gives an impossibly high figure of 82.5 ha, or 5.5 ha/year given the forecast outputs (although in relation to pre 2005 performance then this would be deemed low). However, the employment forecasts suggest a very different outcome for the LDP period for Flintshire – governed by a degree industrial transformation towards more services in the area.

Table 123 – Baseline Assessment Summary

	Baseline
Growth Requirement	28.5
Loss 'Requirement'	-47.57
Net Requirement	-19.1

Source: BE Group 2014

9.84 From these results there are three land need options:

- That a net negative land allocation is required for the 2015-30 period, some -19.1 ha
- That a high growth requirement of 28.5 ha is required (1.9 ha/year) based on sectors projected to grow
- An alternative growth requirement, consistent with the past average take-up levels, is required which would give requirement of 60 – 80 ha requirement over the period (some 4.5 ha/year).

9.85 The weight of the evidence would point towards taking the baseline growth estimate – 1.9 ha/year – although a more optimistic approach (which acknowledge that the smaller land deals are no longer recorded in Flintshire's take-up figures) would allocate between 2-3 ha/year. As with Wrexham, under all three scenarios Flintshire maintains a sizable land surplus (see Table 124) when measured against its 2014 realistic land supply (from Section 6.0).

Table 124 – Land Forecast Options – Flintshire

Model	Existing Land/ Stock 2014[1], ha	Land Need 2015 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	223.94	-19.1	243.04	Net requirement based on projected growth/reduction of employment in industry sectors

Model	Existing Land/ Stock 2014[1], ha	Land Need 2015 to 2030, ha	Surplus (shortfall), ha	Assumptions
High Growth Requirement	223.94	28.50	195.44	Based on projected growth of employment in industry sectors
Long Term Land Take-up	223.94	82.50	141.44	At an average take-up rate of 5.5 ha/year

Source: BE Group 2014

[1] N.B. Realistic headline supply at 31 March 2014

Health and Education

9.86 A high level analysis of forecast jobs growth in the health and education sectors suggests the following sector specific land needs:

- Wrexham – 27.06 ha of additional health related land and 20.00 ha of land for education related uses
- Flintshire – 2.35 ha of additional health related land and 4.71 ha of land for education related uses.

9.87 Between 22 and 75 percent of this need could be for B1/B2/B8 land, which forms part of the broader projected employment land needs discussed above. The remainder would be in the form of medical or educational facilities (i.e. use class D1 – Non-residential Institutions Classes XV and XVI). Based upon the anecdotal evidence from stakeholder consultations, education and health providers did not identify a need for any additional land for these uses.

Household and Population Growth

9.88 Flintshire has a net projected employment growth of 1,223 during the Plan period, thus with a current unemployment rate of 6.2 per cent, the forecasts do not suggest that employment and population growth are showing any significant divergence. Wrexham has a net projected employment growth of 4,952 during the Plan period compared to a total population growth of just fewer than 20,000. This suggests that the resident population is set to grow at a greater rate than the working population.

9.89 In employment land forecast terms, there is unlikely to be any impact on the forecast recommendations for Flintshire. For Wrexham, the question that arises is whether the increase in population, will impact on the need for additional jobs. Cambridge Econometrics in forecasting have modelled the effect on overall growth, whilst the overall population will increase almost fourfold over the labour demand, it must be

remembered that labour supply will come from only a proportion of the total increase, namely the working age population. In percentage terms, the overall jobs growth forecast for Wrexham is 7.87 per cent, around half of the population growth forecast.

9.90 This forecast growth in overall population supports the findings that to rely on net jobs growth alone would reflect a pessimistic approach to growth in Wrexham, and that the proposal to take a realistic level of 2-3 ha per annum is supported by population growth statistics from Welsh Government.

10.0 CONCLUSIONS

Introduction

10.1 This study has included a wide-ranging look at the factors that affect the economy of Wrexham County Borough and Flintshire County (i.e. the study area), with particular reference to those that are likely to affect the future need for employment land and property. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 11.0.

Strategic Context – Planning Policy Position

10.2 PPW (7th Edition, 2014) places a strong emphasis on supporting economic growth through the planning system. This includes ensuring that each Welsh local authority provides sufficient land to meet the needs of both local businesses and inward investors.

10.3 Plans and decisions need to be based on up to date and a locally specific evidence base, which demonstrates the *"suitability of the existing employment land supply in relation to the locational and development requirements of business."* That evidence base should include an Employment Land Review which accounts for prevailing market conditions and can justify employment land supply policies. This report provides that information for Wrexham and Flintshire Counties.

10.4 Local planning authorities should facilitate the provision of sufficient employment land to meet market demand, and support growth and innovation, unless there are good reasons to the contrary.

10.5 LDP policies should provide targets on land provision that will meet the needs of office, industrial and warehouse uses. Policies should also encourage the regeneration and re-use of existing sites, which are still suitable and needed for employment.

10.6 PPW also highlights that allocated employment sites, for which there are no reasonable prospects of development, should not be protected in the long term.

10.7 TAN23: Economic Development provides further guidance on meeting the demand for employment land and premises in each local authority area. In particular, TAN23

puts forward criteria by which an existing employment site may be judged unviable. Employment land may be released if there is little prospect of it being re-occupied by its previous use, if the market that particular site is part of is oversupplied, the existing use has unacceptable impacts on the amenity or environment and/or if other policy priorities (such as housing need) are judged more pressing than economic considerations. The proposed redevelopment should not provide a precedent that will compromise the retention of other (more viable) employment sites in the area.

10.8 TAN23 also states that local planning authorities should apply sequential testing to economic development proposals or possible employment land allocations. First preference should be given to sites within the boundaries of settlements (including planned new settlements and urban extensions), then edge-of-settlement sites and finally land in the open countryside. However, land may be identified in less preferable locations if the resulting benefits outweigh any adverse impacts of the development. The benefits that may outweigh this sequential test are the number of jobs that could be generated, the availability of alternative business locations and any special merit the site/proposal may have.

10.9 Finally, both PPW and TAN23 encourage local authorities to plan strategically for employment land provision, working with neighbouring authorities to identify and meet the needs of the sub-regional office and industrial/warehouse property markets.

Socio Economic Context

10.10 The socio-economic profile of the study area reveals that the Counties have an active workforce; with 74.0 percent of Wrexham's and 72.7 percent of Flintshire's working age population in employment in late-2013, compared to 71.4 percent across North Wales and 68.9 percent across Wales as a whole. At a combined average of 6.4 percent unemployment rates are low in the context of North Wales and employment appears to be increasing, albeit at a comparatively slow rate, as the national recovery from recession gains strength.

10.11 However, the study area includes some of the most intense areas of local deprivation in Wales. In Wrexham this includes the Caia Park and Hightown Cluster, the ninth most deprived area in Wales. Other identified areas of deprivation include parts of Acrefair in Wrexham, and parts of Shotton, Connah's Quay, Holywell and Mold in Flintshire.

10.12 More generally, the proportion of people qualified to degree level (a combined average of 28.5 percent) is low while a substantial proportion (some 10 percent) has no qualifications. However, both Wrexham and Flintshire have a higher proportion of people employed in high level occupations such as managers and senior officials than its mid-level and low level counterparts.

10.13 Rates of out-commuting are high in Flintshire. In 2012, 41 percent of all working residents commuted out of the County to work. By comparison Wrexham is more self contained. In 2012, 29 percent of working residents commuted out of Wrexham.

10.14 Unsurprisingly a high proportion of the study area's residents commuted into Cheshire West and Chester to work (19.8 percent in Flintshire and 9.8 percent in Wrexham). Modest percentages of Flintshire and Wrexham residents also commuted to Denbighshire or Liverpool while Wrexham also has strong links to Shropshire.

10.15 Respectively, 14,900 and 13,100 people commuted into Wrexham and Flintshire, to work. Both Wrexham and Flintshire draw a strong pool of skilled labour from Cheshire West and Cheshire – 4,200 workers in the case of Wrexham (28.2 percent of all in-commuters), 2,100 in the case of Flintshire (16.0 percent of all in-commuters). Wrexham also draws a reasonable amount of labour from Shropshire (3,500 workers or 23.4 percent) while Flintshire has strong links with Denbighshire, taking in 2,600 workers, 19.8 percent of the total).

10.16 In terms of interdependence, 3.5 percent of Wrexham's working residents commuted into Flintshire and 5.9 percent of Flintshire's residents commuted into Wrexham.

10.17 In terms of employment, manufacturing continues to dominate, accounting for 19.6 percent of employment in Wrexham and 29.4 percent in Flintshire, compared to Welsh average of 11.2 percent. This is unsurprising given the strength of key sectors and the range of national and international manufacturing companies present. Cambridge Econometrics' forecasting suggests that local employment in manufacturing will decrease by some 3,200 jobs in Wrexham, to 2030, and 3,900 jobs in Flintshire. However, this will still leave 13.1 percent of the workforce (8,700

people) employed in manufacturing in Wrexham and 21.8 of the workforce (18,700 people) employed in manufacturing in Flintshire.

10.18 In terms of services, the professional, scientific and technical sector accounts for a high proportion of businesses in Wrexham and Flintshire. Cambridge Econometrics LEFM forecasting predicts strong growth in service sectors in both Wrexham (1,800 jobs) and Flintshire (almost 3,000 jobs). Construction is another strong sector in both Counties and also a sector expected to grow over the LDP periods, by 400 jobs in Wrexham and 900 jobs in Flintshire.

10.19 The study area is home to a large stock of businesses (9,865 VAT registered businesses in 2013). This is more than a third of the total stock of businesses in North Wales (35.5) and 8.9 percent of the Welsh national stock. As an alternate measure, Welsh Government figures suggested that in 2013 there were 9,795 businesses in Wrexham and 9,550 in Flintshire. This gives a combined total of 19,345.

10.20 An average of 80.5 percent of companies are micro-businesses (less than 10 employees). A further 15.9 percent in Wrexham and 15.1 percent in Flintshire employ up to 49 people (small businesses). Only a tiny minority of those businesses are home based – only 2.7 percent of the economically active population worked from home in Wrexham in 2011, and only 2.9 percent worked from home in Flintshire, compared to a homeworking average of 3.3 percent across Wales. Homeworking is a characteristic of rural parts of the study area, specifically the rural west (extending to Mold) of Flintshire and the rural south west of Wrexham, extending west from Chirk and the A5 into the rural area south of Llangollen.

Property Market Assessment

10.21 Reflecting employment patterns, the current structure of premises in the study area is strongly industrial. The number of industrial and warehousing units is more than three times greater than the number of offices in Wrexham and more than double in Flintshire. In Wrexham the bulk of the industrial space is located at Wrexham and Llay Industrial Estates, the former also has a significant supply of offices.

10.22 Within Wrexham town, offices are focused in the north west, from the town centre up to the Garden Village neighbourhood and including most of Glyndŵr University and

Coleg Cambria. They are also focused in the south west, which includes Wrexham Technology Park.

10.23 In Flintshire, in 2008 at least, the greatest concentration of industrial premises was in Sealand and Saltney. Offices were focused in Mold and the smaller settlements of Greenfield, Holywell and Bagillt. There were comparatively few premises in Deeside, reflecting the fact that this is a focus for larger occupiers (who require smaller numbers of large buildings) in the County Borough.

Inward Investment

10.24 Consideration of Welsh Government enquiries data suggests that both Wrexham and Flintshire attract good interest from larger businesses .In both cases around a third of enquiries received over 2006-2013 were from organisations looking for industrial/warehouse, and to a lesser extent, offices of more than 2,324 sqm. 186 businesses, over the same period, wanted properties of more than 9,291 sqm. Most land enquiries were for sites of up to 4 ha, although there was reasonable interest for plots of up to 8 ha and greater than 10 ha.

10.25 At the County level, WCBC report receiving regular inward investment enquiries, from a range of national and international sources. These are inevitably focused on Wrexham Industrial Estate and combine with requirements from large local businesses with expansion needs. As is discussed below, it is not clear if sufficient land exists here to support the level of demand indicated.

10.26 In Flintshire, the Deeside Enterprise Zone has attracted interest from one large, Chester based business for land and premises here and the rapid take-up of other land is expected. The Deeside Enterprise Zone previously attracted three other large enquiries, all from firms looking for sites of more than 40 ha, although the lack of available infrastructure and services at that point in time ultimately prevented those from being taken forward. Infrastructure issues here will begin to be addressed in 2015. In Broughton, Hawarden Business Park is growing as a ‘supplier village’ for Airbus and has been selected by a number of aerospace companies including Gardner, Aerotech and Tarvin Precision as a strategic location on which to grow and expand. Mold is identified as an attractive location for service sector firms and has attracted modest interest from outside of the County.

Industrial Market

10.27 Local level enquiries data was received from WCBC for the years 2009-2014. This shows that most recorded interest was for properties at the smaller end of the size spectrum, i.e. below 464 sqm. Some 30 percent recorded industrial/warehouse demand was for premises in the 465-929 sqm and 930-4,644 sqm size bands.

10.28 Across the study area as a whole, demand is for starter workshops of around 50 sqm and small business units of up to 929 sqm. Larger established firms want units of 929-1,858 sqm, in locations that can support them – Wrexham Industrial Estate and Llay Industrial Estate Wrexham; Saltney, Sealand and Queensferry in Flintshire. There is an equal demand of both freehold and leasehold property, although larger businesses will usually seek to buy land and premises.

10.29 Around 62,876 sqm of industrial space is currently vacant in Wrexham – 4 percent of the total floorspace and 3.6 percent by premises numbers. If an average vacancy rate of 7-10 percent is considered reasonable in terms of giving occupiers a full choice of premises types, locations, sizes and tenures, then Wrexham has a rather low rate of overall availability.

10.30 Wrexham Industrial Estate, in March 2014 at least, had only 22 marketed industrial premises out of an overall stock of 450 units. By properties, this represents a comparatively modest vacancy rate of 5 percent.

10.31 Almost all the industrial supply is within an approximate 5 mile radius of Wrexham town. Venture further out than this and the available industrial units are non-existent. There are no units in the Ceiriog Valley, and none in the settlements of Chirk, Cefn Mawr, Acrefair, Ruabon or Johnstown. The western area of Wrexham therefore, provides only 3.8 percent of the total units amounting to 3,167 sqm or 5.0 percent of the floorspace.

10.32 Around 125,038 sqm of industrial space is currently vacant in Flintshire – 6.1 percent of the total floorspace and 6.4 percent by premises numbers. This is closer to the norm of 7-10 percent.

10.33 Deeside Industrial Estate dominates the County's industrial market, with over a third of available units and 56.9 percent of the available floorspace. With 41 vacant

premises out of a stock of some 220 units in total, the vacancy rate by premises is around 19 percent. Deeside Industrial Estate can therefore be said to have a comparatively high vacancy rate at this time, notably larger than the 5 percent vacancy rate at Wrexham Industrial Estate.

10.34 The concentration of units surrounding the Deeside area, is such that there are no vacant industrial units to the north and south of Flintshire, with no availability further west than Mold. With regards to Mold, all available units are of medium to large industrial units between 501-5,000 sqm in size. Hawarden and Saltney are also limited in offer, providing only small units of between 101-500 sqm.

Office Market

10.35 The office market in the study area is smaller. In Wrexham, according to ONS data around 46 percent of the existing stock is located in, and around, Wrexham town. Another quarter is in Wrexham Industrial Estate. Almost three quarters of enquiries received by WCBC for the years 2009-2014, was for smaller suites of 0-93 sqm.

10.36 This is reflected by property agents who note that requirements across the study area rarely exceed 464 sqm and larger suites can struggle to find occupiers. The bulk of enquiries are for 93-186 sqm units. This partly reflects the proximity of both Counties to Chester, the major office centre for the sub-region.

10.37 Demand for offices is often linked to demand for industrial/warehouse space as larger manufacturing and logistics firms seek associated office space for their expanding operations. This is seen as a major driver of demand in Wrexham Industrial Estate and the major manufacturing locations of Flintshire.

10.38 Elsewhere, Wrexham Town Centre and the Technology Park are the main office market locations in Wrexham. The supply of space is (in relative terms) limited here but it is felt to match the comparatively low level of demand.

10.39 In Flintshire, Mold functions as a centre for service sector businesses, including a range of micro and small businesses in the town's large rural hinterland. Future demand in Mold is therefore likely to be for office (and retail) premises. There will continue to be need for industrial premises for higher value manufacturing operations here but it will be at a small scale compared to Deeside.

10.40 Around 20,093 sqm of office space is currently vacant in Wrexham – 16.9 percent of the total floorspace 16 percent by premises numbers. This is quite a high vacancy rate and may indicate an element of oversupply in the current stock.

10.41 Wrexham town has the greatest supply of vacant office space with 52.5 percent of the available floorspace and 38.1 percent of the available units. This is accounted for by the availability of units across the entire size ranges, and more specifically units larger than 1000 sqm. Wrexham Industrial Estate contains 20 units spread across all units all but the 0-25 sqm band and the 1,001 sqm and over group. Wrexham Technology Park has ten vacant units, out of a stock of some 35-40 (excluding premises in medical uses), a comparatively high level of vacancy.

10.42 A modest 7,961 sqm of office space is currently vacant in Flintshire – 6.3 percent of the total floorspace and 8.4 percent by premises numbers. Again, this is closer to the norm of 7-10 percent.

10.43 Saltney has the greatest number of available office units (a third of all units), whilst Mold provides the greatest floorspace (27.1 percent). Deeside Industrial Estate provides only a tenth of vacant office units corresponding to 19.7 percent of total floorspace. This reflects agent's comments with regards to the office market being restricted to within industrial units at Deeside Industrial Estate.

Current Land Availability

10.44 The study has identified a current baseline employment land resource (at 31 March 2014) of 531.04 ha, located across 79 sites, including:

- 204.91 ha on 44 sites in Wrexham
- 326.13 ha on 35 sites in Flintshire.

10.45 However, this supply includes areas of land that are developed, undevelopable due to site constraints, likely to be retained for specific occupiers, developed for non-employment uses or land which has identified ecological issues. Removing such land reduces the net land supply to 303.99 ha – 80.05 ha (20 sites) in Wrexham and 223.94 ha (22 sites) in Flintshire.

10.46 In Wrexham, the land supply is strongly focused in Wrexham Industrial Estate, which also includes all of Wrexham's serviced land. There is also 16.47 ha at Llay Industrial Estate while options in Wrexham town are largely limited to the Western Gateway site, which may be taken up over the next few years. There are at least some employment options in most of the main settlements in the north west and south west of the County Borough. Only Chirk in the far south and the rural east have no undeveloped employment sites in close proximity.

10.47 In Flintshire, half of the land supply is at Deeside although much of this is accounted for by just three sites – Land to North West of Garden City, Land to North of Shotton Paper and Land East of Shotton Paper. A further 71.09 ha is located at Broughton, with more than half of this comprising the Warren Hall site. Away from these key industrial locations, employment land is more evenly distributed around the main settlements of the County. Settlements around the periphery of the Chester Conurbation, at Saltney and Sealand have a reasonable supply of industrial development land.

10.48 In principle, the availability of the existing supply is not a major issue in Wrexham. Almost two thirds of the land could be brought forward in the medium term (1-5 years). There is also a modest supply of immediately available land, 29.65 ha, where development is underway or likely to commence shortly. However, it should also be noted that some 11.92 ha of land is actually developed or has significant physical constraints. Another 89.30 ha is likely to be held to meet the expansion needs of specific businesses and cannot be considered part of the readily available employment land supply, or is proposed for alternative uses. Finally, 23.64 ha comprises land on sites which have identified ecological issues. 85.03 ha of this land is at Wrexham Industrial Estate, reducing the supply there from 141.07 ha to 56.04 ha.

6.69 In Flintshire, there are strong medium term supply of 176.71 ha (54 percent of the total) which is likely to be brought forward in 1-3 or 3-5 years. Another 44.7 percent comprises a longer term supply where completion is unlikely in less than 5 years and in practice may only occur later in the LDP period to 2030. However, only on Land to North West of Garden City, can a specific development timeframe of 12 years, from 2014, be identified.

Employment Areas

10.49 The study area's existing 61 Employment Areas (31 in Wrexham, 30 in Flintshire) have been appraised and graded A-E, as defined in Table 133.

Table 133 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Development Plan
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments.	Promote alternative uses if possible
E		

Source: BE Group 2014

10.50 Table 125 summarises the 31 identified Employment Areas of Wrexham by each of the above grades. It is assumed that future growth will be focused around the five flagship locations (Grade A or B, totalling 742.25 ha), which could be further extended to include Wrexham Western Gateway and Ruabon Business Park when, and if, development is completed at these locations. There may be opportunities for further growth at Wrexham Industrial Estate, Wrexham Technology Park/Western Gateway and Chirk Industrial Estate, and these are considered further below.

Table 125 – Wrexham Employment Areas' Appraisal by Category

Category	Number of Areas	Land Area, ha	Comments
A and B - Key/Flagship Areas	7	742.25	• 1: Wrexham Industrial Estate • 2: Llay Industrial Estate, Llay • 7: Gresford Industrial Estate, Wrexham

Category	Number of Areas	Land Area, ha	Comments
			Town • 9: Wrexham Western Gateway, Wrexham Town • 10: Wrexham Technology Park, Wrexham Town • 25: Chirk Industrial Estate, Chirk • 26: Ruabon Business Park, Ruabon The County Borough's current 'flagship' locations, the focus for growth proposals and inward investment enquiries. Wrexham Western Gateway and Ruabon Business Park are undeveloped at this time. However, both represent key locations for the delivery of new employment areas, which would likely achieve a Grade A or B rating when complete.
B/C and C - Fit-for-Purpose Local Employment Areas	16	116.59	Active and established industrial estates/business parks in the area, primarily catering to local business needs and comprise active B1/B2/B8 employment locations and should be protected in the emerging LDP. These are: **B/C** • 6: Croesfoel Industrial and Bersham Enterprise Centre, Rhostyllen/Bersham • 11: Five Crosses Industrial Estate, Coedpoeth • 12: Rhosddu Industrial Estate, Wrexham Town • 18: Pandy Industrial Estate, Gresford **C** • 4: Canal Wood Industrial Estate • 5: Vauxhall Industrial Estate, Johnstown • 8: Wynnstay Technology Park, Cefn/Acrefair • 14. Whitegate Industrial Estate, Queensway, Wrexham • 16. Two Mile Industrial Estate, Brynteg • 20. Westminster Industrial Estate Gwersyllt • 21. Coppi Industrial Estate, Rhos • 22. Gardden Industrial Estate, Ruabon • 23. Lightwood Green Industrial Estate, Overton • 24. Llay Hall Industrial Estate and Riverside Business Park, Cefn y Bedd

Category	Number of Areas	Land Area, ha	Comments
			• 27. Rossett Business Village, Rossett/Lavister
C/D and D - Lower Quality in Residential/Rural Areas	5	22.25	Comprise lower grade employment areas, often with high vacancy rates. WCBC should seek to protect these areas within the County Borough. However, over the longer term these locations could be considered for reuse and/or redevelopment for a mix of appropriate uses. Areas are: • 13: Advance Park Industrial Estate, Rhosymedre, Cefn/Acrefair • 15: Cambrian Price Industrial Estate, Rivulet Road, Wrexham Town • 17: Penley Industrial Estate, Penley • 19: Southsea Industrial Estate, Southsea • 28: Pickhill Cross Lanes, Cross Lanes
D/E and E – Areas of Concern, Requiring Immediate Attention	0	-	-
Sub Total	***28***	***881.09***	•
No Grading – Have yet to be developed	1	8.00	• 3: Former Steelworks Site, Brymbo At the time of writing, no employment development has taken place on this strategic site. The prospects for delivery remain uncertain at this time.
No Grading – Locations which should not be protected as B1/B2/B8 Employment Areas.	2	2.64	Comprises two locations at Cross Lanes - 29: Maelor Abattoir and 30: Clutton Agricultural. These locations form part of the County Borough's agricultural sector rather than providing B-Class employment. Adoption of this site for B Class employment would therefore appear unnecessary and could set the precedent for further development at these rural locations.
TOTAL	**31**	**891.73**	

Source: BE Group, 2014

10.51 Areas graded B/C and C generally represent the County Borough's supply of B1/B2/B8 premises for meeting local needs. These total some 1116.59 ha. They should be protected for that use. It is not envisaged that large scale growth will take place at these locations, outside of the allocated employment sites. The possible exception is Five Crosses Industrial Estate, Coedpoeth where there is potential to extend employment area to the north where land has permission for a new unit in

connection with Tomlinson's Dairies and adjacent land has been submitted as a candidate site for employment use.

10.52 23: Lightwood Green Industrial Estate, Overton; 24: Llay Hall Industrial Estate and Riverside Business Park; 27: Rossett Business Village and Rossett/Lavister are active employment areas which should be protected in the emerging LDP. However, the four areas Graded C/D or D, which total 16.14 ha, could represent longer term redevelopment opportunities for a mix of appropriate uses.

10.53 Overall there is some 891.73 ha of developed/proposed to be developed employment land in Wrexham, in 31 locations.

10.54 Table 126 summarises the 30 identified Employment Areas of Flintshire by each of the above grades. It is assumed that future growth will be focused around the five flagship locations (Grade A or B, totalling 1,394.02 ha).

Table 126 – Flintshire Employment Areas' Appraisal by Category

Category	Number of Areas	Land Area, ha	Comments
A and B - Key/Flagship Areas	5	1,394.02	• EM3 (Development Zone): Deeside Development Zone • EM3 (Development Zone): Hawarden Industrial Park, Chester Aerospace Park and Airport Development Zone (Airbus), Broughton • EM3, Principal Employment Area 1 and 10: Greenfield Business Park, Greenfield • EM3, Principal Employment Area 8: St Davids Park, Ewloe • EM3, Principal Employment Area 11: Ashmount Industrial Estate, Flint The County's current 'flagship' locations, the focus for growth proposals and inward investment enquiries.
B/C and C - Fit-for-Purpose Local Employment Areas	25	282.04	Active and established industrial estates/business parks in the area, primarily catering to local business needs.
C/D and D - Lower Quality in Residential/Rural Areas	0	-	-

Category	Number of Areas	Land Area, ha	Comments
D/E and E – Areas of Concern, Requiring Immediate Attention	0	-	-
TOTAL	**30**	**1,676.06**	

Source: BE Group, 2014

10.55 Areas graded B/C and C generally represent the County's supply of B1/B2/B8 premises for meeting local needs. These total some 282 ha. They should be protected for that use. It is not envisaged that large scale growth will take place at these locations, outside of the allocated employment sites.

10.56 In both Wrexham and Flintshire this study has identified a number of small scale 'regeneration opportunities' which have the potential to provide additional/alternative employment land, meet the growth needs of existing local firms or other requirements. These are outlined in the Employment Area Proformas of Appendices 9 and 10.

Stakeholder Engagement

10.57 A wide consultation with various stakeholders was conducted as part of the market research, which comprised community and town councils, key employers and landowners, public sector organisations including relevant neighbouring local authorities.

10.58 Cefn Mawr Community Council put forward two sites considered suitable for B-Class uses:

- Former Flexsys site, Ruabon Works, Cefn-mawr – Premises within an existing industrial complex which is well integrated into the Cefn-mawr settlement area. Businesses are no longer trading here and consent for demolition was secured in August 2014. The owner's future plans for this site are not known but it assumed that they will seek consent for redevelopment in the short/medium term. The site is large enough to accommodate a mix of uses and it is recommended that WCBC encourage the owner/developer to provide some B1/B2/B8 premises within any redevelopment scheme, to offset the loss of this large industrial complex and provide local employment.

- The Ebenzer/Glass House, Crane Street, Cefn Mawr – This chapel has been restored into a centre for community services and facilities, office and gallery spaces and a café bar. The range of uses appropriate for this property have therefore been established and could include B1(a) offices.

10.59 Gresford Community Council recommend two locations within the community as appropriate for B-Class uses:

- The site of the former Antique Shop at 7 Chester Road, Gresford – Mid-sized retail premises with some off street parking. If it has not already been reused, the property would be suitable to accommodate a single B1(a) office occupier or A2 retailer. Generally, its contribution to local employment will be modest and securing this premises for B-Class employment should not be considered a high priority for WCBC
- Allington Hall, Vicarage Lane, Gresford – This is the former Gresford Youth Club, which extends to 665 sqm and includes a hall, stores, toilets and offices. Formerly owned by WCBC the property was sold at auction in October 2014. The new owners plans for this property are not known but given its position on a comparatively narrow residential street, bounded by housing, it would only be suitable for accommodating a smaller B1(a) office business. Again, its contribution to local employment will be modest and securing this premises for B-Class employment should not be considered a high priority for WCBC.

10.60 Glyndwr University are looking to consolidate activity at Plas Coch Campus in Wrexham, expanding its facilities and the level of employment here. Proposals may include the provision of a micro business incubation centre. However, as this is a consolidation, the University will not be seeking any additional land in Wrexham. Indeed plans call for the disposal of College of Art, two residential properties, undeveloped land at Dean Road and the Gatewen Site, Gatewen. This will free up a number of properties and sites, in and around, Wrexham town for other uses.

10.61 The range of uses appropriate on each of these sites will need to be agreed with WCBC. However, the University has indicated that it will be seeking high value uses on all its future disposal sites, in order to fund change at Plas Coch and at the Northop Campus in Flintshire. This primarily means housing but could include retail/leisure options. B1/B2/B8 employment is unlikely to generate the capital

receipts needed. It cannot therefore be assumed that any of these sites will be made available for B-Class employment. Given the relatively modest demand for offices uses in Wrexham town indicated by stakeholders in Section 5.0 and the general oversupply of employment land in the County Borough, indicated in Section 9.0, securing any of these sites for B1/B2/B8 employment should not be a high priority for WCBC. Rather the need to support Glyndwr University in its plans for change at Plas Coch Campus, which will generate employment benefits for the town, would seem to be more important.

10.62 If Glyndwr University does expand outside of its present facilities, it is likely to be at the Northop Campus in Flintshire, where the University has greenfield landholdings which extend across the A55. Subject to achieving capital receipts from land sales elsewhere, the University would wish to develop this land for lab space, residences and car parking. The issues associated with the loss of this greenfield land have not been explored in this study, but subject to policy, ecology and planning constraints it is recommended that FCC support Glyndwr University in its plans to expand in the County and provide further education related employment. This development would not involve the loss of any employment land.

10.63 Coleg Cambria has a ten year estates plan amounting to £75 million in investments. However, again most change will be within its existing campuses. With the purchase of the former Groves High School site (i.e. land already designated for education uses) the College has all the additional land it requires. Future actions are likely to include the disposal of the Wrexham Training Centre, Ruabon Road and WCBC should approach Coleg Cambria, if it has not already done so, to discuss appropriate alternative uses on this site. Again there is not an urgent need to secure this site for B1/B2/B8 employment.

10.64 Betsi Cadwaladr University Health Board confirmed that an updated Site Development Plan is being prepared for Wrexham Maelor Hospital. This will see some growth within the existing hospital site but does not envisage the release of any hospital land for other uses. There are also no significant plans for change at the community hospitals in Chirk, Deeside, Holywell, Mold or Penley, beyond some consolidation and/or relocation of certain medical service

10.65 The two large developments planned by the University Health Board – Caia Park Primary Care Resource Centre in Wrexham and the Ambulance and Fire Service Joint Resource Centre in the south of Wrexham town – are consented and/or underway.

10.66 There may be potential options to dispose of the existing fire station at Bradley Road in Wrexham, and the existing ambulance stations in Chirk and Wrexham owned by Betsi Cadwaladr University Health Board. WCBC should therefore consider what alternative uses might be appropriate on these sites. The University Health Board has no other land or property requirements.

10.67 Only two of the company stakeholders consulted in the study area – Kronospan in Wrexham and Knauf Insulation in Flintshire – would potentially relocate as they are constrained by development in all directions. However, this would be a long term option (in excess of five years).

10.68 Kronospan have identified farmland to the north, which it owns, as an option for future growth. This area is beyond the current development boundary of Chirk, but is seen as a logical extension to the current industrial operations. As stated, the land will not be required in the short or medium term, but there is still a need to determine if this land can be viably allocated in the emerging LDP for employment purposes. The allocation would be to meet the specific needs of this major local employer and without prejudice to the general view of this study that Wrexham has an employment land oversupply (see Section 9.0). If this land is judged not viable for B1/B2/B8 employment then WCBC should engage proactively with Kronospan to identify viable alternative sites within the County Borough.

10.69 All other businesses that are expecting growth within the next five years can accommodate this within their existing curtilage or existing building footprint.

10.70 The Port of Mostyn has the long term aspiration to develop some 12-16 ha of land to the north for a renewable energy manufacturing (and energy generation) park. This would, amongst other things, link turbine manufacture directly to the port facilities. However, delivery of such a proposal would require the identification of large scale demand from renewable energy businesses. It would also require development within a strongly protected area of environmental quality on the Dee Estuary The

viability/deliverability of this proposal thus remains questionable at this time and FCC should engage with the Port to discuss if this option can be realised.

10.71 All of the Welsh local authorities which neighbour Wrexham and Flintshire have sufficient employment land to meet their own needs and do not need to look to the Counties to support any shortfalls. Of the three neighbouring English local authorities, Cheshire West and Chester Council may need to look to neighbouring Flintshire to support further industrial growth along the England-Wales boundary which can serve both local authority areas.

Company Survey

10.72 Overall 354 questionnaires were completed (160 in Wrexham and 194 in Flintshire) as part of the company survey, representing 50.1 percent of the 700 businesses targeted. With 9,865 VAT Registered companies in the study area, this is a representative picture of B1, B2 and B8 performance and is an important strand of the evidence base.

10.73 Small units of less than 1,000 sqm are the most prevalent size, accounting for the business structure being dominated by SMEs. This is typical of the national profile. Over half of the respondents occupy industrial/warehouse property, whilst 20 percent are in offices/serviced offices. Slightly more businesses own their own premises than lease.

10.74 In Wrexham eight companies provided reasons as to their dissatisfaction with existing premises. Positive comments, made by three businesses, included a desire to own their own premises and expand. In terms of more negative views, two businesses have access issues and concerns over charges and businesses rates. One company has issues with the general maintenance of WCBC owned property it leases.

10.75 In Flintshire five companies provided reasons as to their dissatisfaction with existing premises. Two companies, based in Deeside and Buckley, require larger premises, with the latter company also lacking the funds for expansion. Two further companies are unhappy with the lack of assistance from FCC. Finally, a company based within the Flintshire Coast area has no real passing trade and limited council services because of its rural setting.

10.76 In terms of company needs staying loyal to the study area, there is a level of demand across all industrial sizes from 500 sqm to 1,000 sqm, and modest office requirements for a range of sizes up to 2,000 sqm. Moderate quality office and industrial units are required and there is a definite preference for freehold options over leasehold. Many businesses gave multiple locations in the Counties for where they would wish to relocate, but for those who did specify a specific location, demand is strongest for Wrexham Industrial Estate followed by Deeside Industrial Estate and the Chester Boundary.

Future Land Requirements

10.77 This study is primarily concerned with those uses included within the planning Use Class B (B1, offices, research and development and light industrial; B2, general industrial; B8, storage and distribution) and appropriate sui generis uses including recycling and the environmental industry. It considers a number of different employment land scenarios. All look at the situation as it stands now. As such the land supply required is balanced against what is currently available. Furthermore it sets forecasts for the LDP periods of Wrexham and Flintshire – 2013 to 2030 for Wrexham, 2015 to 2030 for Flintshire.

10.78 The employment forecasts are based on the 2014 LEFM, produced by Cambridge Econometrics and the Institute of Employment Research for the North East Wales local authorities of Denbighshire, Wrexham and Flintshire. This provided employment and GVA growth modelling for the period 2000-2025. To better reflect LDP periods for Wrexham and Flintshire, Cambridge Econometrics was subsequently commissioned, as part of this study, to provide updated projections of employment and GVA by industry sector to 2030.

Wrexham

10.79 Forecast analysis suggests a net negative land requirement of -5.4ha over the next 17 years up to 2030. This is linked mainly to the projected contraction in manufacturing employment which will (negatively) bias the land requirement. However, as was noted in Section 9.0, it is the measure of growth which has largely determined the past take up of employment land in Wrexham.

10.80 The identified requirement, from sectors projected to grow to 2030, is around 35 ha or 2.06 ha/year. The alternative approach, benchmarking on the basis of the 10 year average take up rate since 2003 (which gives a figure of 66 ha or 3.9 ha/year) would appear to yield too high a land allocation given the forecasts.

10.81 However, the employment forecasts suggest a continuation of pre-recession growth for the LDP period for Wrexham – but also governed by a degree of de-industrialisation towards more public and other services in the area. In this regard caution is clearly required in terms of the full conversion of jobs in the public sector into land requirement and would therefore indicate that the lower baseline estimate would be reflective in this regards (see Table 127).

Table 127 – Baseline Assessment Summary

	Baseline
Growth Requirement	35.13
Loss 'Requirement'	-40.57
Net Requirement	-5.44

Source: BE Group 2014

10.82 From these results there are three land need options:

- That a net negative land allocation is required for the 2013-30 period according to the baseline (low growth) requirement, -5.4 ha in total
- That a high growth requirement of 35 ha is required (2.06 ha/year) based on sectors projected to grow
- An alternative growth requirement, consistent with the past average take-up levels, is required which would give requirement of 60 – 70 ha over the period (some 4 ha/year).

10.83 The weight of the evidence would point towards taking the baseline growth estimate – **around 2 ha/year (or 2.33 ha if split exactly)** – although a more optimistic approach would allocate between **2-3 ha/year** taking account of past performance and the benchmark levels. As Table 128 shows, under all three scenarios Wrexham maintains a land surplus when measured against its realistic land supply of 80.05ha. However, in the case of Long Term Land Take-up that surplus is a comparatively modest 13.75 ha.

Table 128 – Land Forecast Options – Wrexham

Model	Existing Land/ Stock 2014[1], ha	Land Need 2013 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	80.05	-5.44	85.49	Net requirement based on projected growth/reduction of employment in industry sectors
High Growth Requirement	80.05	35.13	44.92	Based on projected growth of employment in industry sectors
Long Term Land Take-up	80.05	66.30	13.75	At an average take-up rate of 3.9 ha/year

Source: BE Group 2014

1 N.B. Realistic headline supply at 31 March 2014

10.84 These findings are also supported by Welsh Government household and population growth figures, which suggest a relatively high rate of population growth, for the County Borough to 2030.

10.85 However, comparisons undertaken with Welsh Government statistics are indicative only comparison and do not, for example, take account of the impact of the actual working age population and potential changes in commuting patterns. There is a need for further research to bridge these gaps and produce more comprehensive linked figures.

Flintshire

10.86 Forecast analysis suggests a net negative land requirement of -19ha over the next 17 years. Again this reflects projected contractions in the manufacturing sector. However, looking at sectors projected to grow gives a positive requirement of 38.5 ha is required to 2030, or 1.90 ha/year

10.87 Benchmarking against an eight year average take up rate since 2005 gives an impossibly high figure of 82.5 ha, or 5.5 ha/year given the forecast outputs (although in relation to pre 2005 performance then this would be deemed low). However, the employment forecasts suggest a very different outcome for the LDP period for Flintshire – governed by a degree industrial transformation towards more services in the area (see Table 129).

Table 129 – Baseline Assessment Summary

	Baseline
Growth Requirement	28.5
Loss 'Requirement'	-47.57
Net Requirement	-19.1

Source: BE Group 2014

10.88 From these results there are three land need options:

- That a net negative land allocation is required for the 2015-30 period, some -19.1 ha based on a low growth baseline
- That a high growth requirement of 28.5 ha is required (1.9 ha/year) based on sectors projected to grow
- That alternative growth requirements consistent with the past average take-up levels is required which would give between 60 – 80 ha over the period (approx. 4.5 ha/year).

10.89 The weight of the evidence would point towards taking the baseline growth estimate – **around 2ha/year (or 1.9 ha/year if split exactly)** – although a more optimistic approach (which acknowledge that the smaller land deals are no longer recorded in Flintshire's take-up figures) would allocate between **2-3 ha/year**. As with Wrexham, under all three scenarios Flintshire maintains a sizable land surplus (see Table 130) when measured against its 2014 realistic land supply of 223.94 ha.

Table 130 – Land Forecast Options – Flintshire

Model	Existing Land/ Stock 2014[1], ha	Land Need 2015 to 2030, ha	Surplus (shortfall), ha	Assumptions
Baseline (Low Growth) Requirement	223.94	-19.1	243.04	Net requirement based on projected growth/reduction of employment in industry sectors
High Growth Requirement	223.94	28.50	195.44	Based on projected growth of employment in industry sectors
Long Term Land Take-up	223.94	82.50	141.44	At an average take-up rate of 5.5 ha/year

Source: BE Group 2014

[1] N.B. Realistic headline supply at 31 March 2014

10.90 The substantial capacity within Flintshire suggests that businesses should not be constrained from entering the market due to a lack of land choice. Indeed the large tracts of land, particularly in established employment areas such as Deeside, would

suggest that employment has the potential to grow faster than the employment modelling has forecast, given that employment models are based on past trends. The significant supply of land in committed projects suggests that employment growth could be above past trends. The BE Group has provided Flintshire County Council with separate advice and employment scenarios, factoring in the potential of major employment areas to drive growth.

10.91 Forecasting suggests that relevant non B-Class uses (health and education) could provide some 4,000 more jobs in Wrexham by 2030 – 2,300 more jobs in health, 1,700 in education. In Flintshire these sectors will provide a more modest 600 additional jobs between 2015 and 2030 – 200 more jobs in health, 400 in education.

The Needs of Non-B Class Uses

10.92 Forecasting suggests that relevant non B-Class uses (health and education) could provide some 4,000 more jobs in Wrexham by 2030 – 2,300 more jobs in health, 1,700 in education. In Flintshire these sectors will provide a more modest 600 additional jobs between 2015 and 2030 – 200 more jobs in health, 400 in education.

10.93 Using standard density ratios this suggests that 92,000 sqm of additional health related floorspace will be required in Wrexham to 2030 and 68,000 sqm of education related floorspace. This suggests a need for 27.06 ha of additional health related land and 20.00 ha of land for education related uses. In Flintshire the projected need is for 8,000 sqm of additional health related floorspace and 16,000 sqm of education related floorspace – 2.35 ha of additional health related land and 4.71 ha of land for education related uses.

10.94 Between 22 and 75 percent of this need could be for B1/B2/B8 land, which forms part of the broader projected employment land needs discussed above.

10.95 However, while the forecast statistics suggest the need for large scale land allocations in the health and education sectors, this is not backed up by consultations with further and higher education providers in the study area, or with the Health Board. As noted above, while there are plans for growth in both the local university, college, which will, as forecast, increase sectoral employment these will mostly take place through consolidation on existing (or recently acquired) sites. The only large

education facility predicted to expand onto new land is the University's Northop Campus, Flintshire, something FCC will need to take account of in its emerging LDP.

10.96 In the health sector the two largest development – the joint Ambulance and Fire Service Joint Resource Centre and the Caia Park Primary Care Resource Centre – are agreed and will be delivered shortly.

10.97 Possibly excluding the Northop Campus, this evidence does **not** support large scale allocations of health and education land in the LDPs of the two local planning authorities. If there are needs, they are likely to be for small scale sites to accommodate local health centres or the growth/new development of primary and secondary schools. Such developments will be on sites accessible to local communities and are unlikely to be on land presently proposed for B1/B2/B8 employment, unless forming part of a larger mixed-use development.

10.98 The future land needs for small scale clinics or school facilities will need to be agreed with local education and health providers and will also be determined, at least in part, by the level of new housing growth which occurs in each County. However, given the small scale of any facilities it is unlikely that more than **3-4 ha** will be needed in each authority over the respective LDP periods to accommodate local health and education needs.

Wrexham Industrial Estate

10.99 While the findings of this study suggest that Wrexham County Borough as a whole has sufficient land to meet its needs, the qualitative research undertaken also indicates a growing land supply shortfall, relative to identified demand at Wrexham Industrial Estate. Specifically that:

- While Wrexham Industrial Estate has a gross baseline supply of 141.07 ha (which is over two thirds of the County Borough's total supply), when land considered unlikely to come forward, held for the expansion of existing firms or proposed for alternative uses is excluded, that total reduces to 56.04 ha
- Based on current planning consents and identified development plans, up to 90 percent of this remaining supply, some 59 ha, could be taken up over the next three years. Thus the long term supply of viable land at Wrexham Industrial Estate may actually be comparatively small

- As most sites have some plans for change and/or planning consents associated with them, or are held for the expansion of specific firms, there is a shortage of readily available land on which to create an 'offer' for the future marketing of the estate to inward investors or existing businesses
- Property market stakeholders also argue that the quality and amount of stock across both counties is diminishing following low levels of new development, or investment in existing stock, over the recessionary period – this will be a threat in the future if it is not addressed now
- Stakeholders also argue that the development of the prison will boost market demand at Wrexham Industrial Estate as supply chain and affiliated companies seek to locate close to the facility. Existing Industrial Estate occupiers, benefiting from prison supply contracts may also be prompted to seek additional or expanded accommodation. At the time of writing, no research has been completed on the level of indirect economic benefit, in terms of jobs generated, companies attracted to the area, etc. which Wrexham will receive from the Prison development
- Agents, developers and WCBC officers with responsibility for marketing the estate report good demand for land and premises. Specific requirements are for:
    - Sites of 2-4.5 ha to meet the needs of inward investors and large local firms looking to grow
    - Small businesses (30-40 employees) looking for 0.4 ha plots which could provide design and build options, for owner occupation
    - Industrial units of 929-1,858 sqm, along with some smaller, sub-500 sqm requirements.
- There is a low vacancy rate (around 5 percent) across the estate for office and industrial premises. If a vacancy rate of 7-10 percent is considered reasonable in terms of giving occupiers a choice of premises types, locations, sizes and tenures then Wrexham Industrial Estate has an undersupply of property options at this time. This lack of supply, relative to demand, may encourage local developers to undertake new developments of small business space in the short and medium term.

10.100 The evidence therefore suggests that there is a need to allocate further land at Wrexham Industrial Estate, in the current LDP period, to provide sites which can meet both the needs of existing firms and be marketed to future inward investors.

Such a site (or sites) would have to be sufficiently large to meet the diverse range requirements identified, i.e. provide plots of 2-5 ha for inward investment/large business growth, smaller plots for design and build options and development land for new schemes of office and industrial units. Given such requirements the new allocation should not be less than 20-30 ha in size, exclusive of ecological mitigation needs.

Llay Industrial Estate

10.101 Llay Industrial Estate is well established and home to a number of the County Borough's larger employers. This study has not identified strong demand for further land and premises here. However, it is worth noting that of the baseline employment land supply of 16.47 ha at Llay Industrial Estate, 1.87 ha is already developed or probably undevelopable. The North Wales Police HQ scheme, proposed on land south of Sharp, will take up another 6.20 ha when it is brought forward.

10.102 10.103 There appears to be little scope to expand Llay Industrial Estate, certainly the development of land at nearby Llay Main Colliery Tip (when it is restored) would be difficult and costly. It is also noted that while Sharp has reduced the scope and range of its manufacturing operations at Llay, there is no evidence that the company is intending to release any land within the current curtilage of its site for occupation by other firms.

10.103 Thus it is important that the remaining employment land here be protected for B1/B2/B8 uses. This includes Site E1.31 Llay Industrial Estate (6.40 ha) a complex site, in multiple ownership, in use for both storage and agricultural uses and with access constraints. Further research is recommended to determine if the constraints here can be overcome and if this site is viable. If it is not then there is no remaining supply at Llay.

Wrexham Town

10.104 The office market in Wrexham Town Centre is modest and generally limited to local financial services and legal firms. This is a reflection of the lack of supply here as most recent development for offices has been at Wrexham Industrial Estate or at Wrexham Technology Park. Stakeholders were unclear if demand supported the development of further offices in central Wrexham but it is worth noting the current

aspiration of Glyndwr University to deliver a new incubation centre as part of its partial redevelopment of the Racecourse Stadium stands.

10.105 This raises the option that an improved office offer in central Wrexham may boost local demand. For this reason it is suggested relatively small scale office schemes should, subject to other policy considerations, be supported, particularly if such small schemes would add only a small amount to the County Borough's overall employment land supply. It is assumed that any such schemes would be windfall opportunities and that there is no requirement to specifically allocate office sites in the emerging LDP. This does not preclude, however, that emerging Town Centre Masterplanning schemes may include office proposals as part of wider regeneration plans.

10.106 In the south Wrexham Technology Park is well established, providing a mix of office, health and education premises. A proposed development of 4.05 ha has effectively now been secured on the employment land and is the subject of submitted planning applications for both the required access road and the development which will provide 8,166 sqm of new Grade A accommodation for a single end user. This will be completed and occupied by Spring 2016. Following the development identified above only 4.75 ha of developable employment land will remain. However, this cannot currently be developed until major improvements are made to the adjoining A483 junction. Demand exists for the remaining employment land and WCBC Economic Development officers have recorded three strong enquiries for land here over 2014. Each was seeking to carry out their own developments respectively for 600, 1,000 and 1,500 sqm of accommodation.

10.107 Forecasting does suggest that employment in local service sectors will increase to 2030. However, research also suggests there is a comparatively high vacancy rate within the office premises of the existing Technology Park and, notwithstanding the identified land requirements, stakeholders were not confident about the level of further demand for larger floorplate offices here. Given this evidence and the general oversupply of land across the County Borough, this study cannot recommend the provision of further land at Wrexham Gateway/Technology Park. However, once the remaining 4.75 ha is taken up a local demand appraisal should be undertaken to see if there is a case for the provision of further B1 land here.

10.108 Options also exist for the delivery of further Business Park space at the 23 ha Ruabon Business Park site to the south. Development here could provide a good quality B1 employment area serving Wrexham and well linked to Wrexham town via the A483. However, the latest planning application for Ruabon Business Park would, if approved, see 85 percent of this site (19.58 ha) developed for non B-class uses. The remaining B1 class employment development would be a modest 17,606 sqm on 3.42 ha. Delivery of even this element remains questionable given the site's ecological constraints and the ongoing need to reach an agreement on a viable development mix.

10.109 Land supply scenarios already allow for the fact that 85 percent of Ruabon Business Park will not be developed for B1 class employment. If the remaining 15 percent were not brought forward for employment uses, or at all, this would be an undesirable outcome. However, given the modest demand for offices in, and around, Wrexham town and the general land oversupply in the County Borough (at least 13.75 ha), it would not have major impacts either on the local economy or the County Borough's land stocks. The non-delivery of space at Ruabon would, however, need to be factored in to any future consideration of the demand for an additional phase at Wrexham Gateway/Technology Park.

10.110 Wrexham town is also served by a number of established local industrial estates, which are generally well occupied and providing premises of reasonable quality. The exception is Cambrian Price Industrial Estate, Rivulet Road on the edge of the town centre which comprises a budget quality, low density employment area of only limited economic value. This is indentified as a long term redevelopment opportunity which could meet needs for a range of uses appropriate for such an edge of centre location. Any redevelopment scheme should include an element of B1/B2/B8 uses, to replace that which would be lost.

Rural Areas and Small Settlements – Wrexham

10.111 Outside of Wrexham town and the two main industrial estates, most of Wrexham County Borough comprises rural areas and smaller villages/settlements, with employment opportunities required to support rural diversification and sustainable communities. This does not necessarily mean allocating new employment land, it can be about making better use of existing employment areas or converting

redundant agricultural buildings and former business space, breaking it down into units suitable for new business start-ups and SMEs.

10.112 Table 131 identifies some 16 service centres (rural and urban), or logical groups of centres. It also includes consideration of the rural hinterlands which surround these centres (which will include other, smaller, settlements not specifically referred to here) to cover the whole of the County Borough outside of Wrexham town, Wrexham Industrial Estate and Llay Industrial Estate. The table provides an assessment of opportunities including, if required, recommendations for land and premises provision. These are suggestions the County Borough Council may wish to consider to help encourage diversification of the rural economy and sustainable economic growth for these settlements.

Table 131 – Wrexham – Other Rural Areas and Small Settlements' Assessment

Service Centre	Comment
Rural East (from Gresford south to the River Dee)	As this is, in effect, the rural hinterland of Wrexham Industrial Estate, the need for further employment development, separate from the estate is unlikely to be significant. One possible redevelopment opportunity is at Pickhill, Cross Lanes. This large rural dairy which appears to be partially/fully vacant at present. Assuming the area is not soon occupied by another business then the site could be available for a modest rural employment scheme.
Gresford/Marford	While there are only limited B-Class employment uses within these settlements, their position in the A483 Corridor gives them good access to Wrexham town and a range of established employment areas. No evidence of need for further local employment opportunities.
Rosset/Lavister, Burton	Area is served by Rossett Business Village, a small but successful modern business scheme. The Village should be protected in the LDP. No evidence of need for further local employment opportunities.
Bradley, Rhosrobin, New Rhosrobin	Served by Westminster Industrial Estate, Pandy Industrial Estate and Rhosddu Industrial Estate, with other employment areas within a reasonable distance. There is unlikely to be significant need for further local employment opportunities.
Gwersyllt (including Summerhill)	Served by Westminster Industrial Estate and Rhosddu Industrial Estate, with other employment areas within a reasonable distance. There is unlikely to be significant need for further local employment opportunities.
Broughton (New Broughton, Pentre Broughton), Brynteg, Brymbo	The Former Steelworks Site, Brymbo remains available to deliver B1 light industrial units. However, planning consent here dates back to 1997 and the owner has continued to defer the submission of a reserved matters application since that time. Employment uses have been consented on the Steelworks site,

Service Centre	Comment
	Brymbo for 18 years, with no evidence that these uses will ultimately be delivered. WCBC needs to engage with the owners of the former and seek stronger assurances that B-class employment uses will ultimately be delivered here. Also to identify what efforts are being made to market this land to employment occupiers and developers. If such assurances cannot be obtained and/or that, despite appropriate efforts in marketing, there appears to be no demand for employment uses here then it is not recommended that WCBC continue to protect the land indefinitely. It is accepted that Broughton, Brynteg and Brymbo lack employment options at this time (they are the only larger settlements without an associated industrial estate) and if B1 uses cannot be delivered here, WCBC is encouraged to find an alternative site of comparable size.
Tanyfron/Southsea	Redevelopment at Southsea Industrial Estate has already produced some high quality offices and the remaining colliery buildings would appear to represent an opportunity to build on this success. Schemes for the reuse of these properties for good quality B1 uses should be encouraged.
The rural west (extending from Bwylchgwyn in the north to Trevor in the south)	This rural location has no local employment areas while access to surrounding settlements is more constrained than in other parts of the County Borough. There is no evidence of any need for a dedicated employment area here. However, given the lack of local employment space rural planning policy should be sympathetic to appropriate farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Coedpoeth, Minera	Settlements appear well served by Five Crosses Industrial Estate. There is unlikely to be significant need for further local employment opportunities.
Rhostyllen, Bersham	Rhostyllen and Bersham benefit from the presence of Croesfoel Industrial Estate and Bersham Enterprise Centre along with their proximity to Wrexham town. Planning policy should separate the three distinct parts of Croesfoel Industrial Estate (roadside services, motor retail and industrial/warehousing) in the emerging LDP, with the goal of protecting the larger industrial/warehouse premises in the north from loss to alternative uses. Pulestone Industrial Estate is a small but active budget quality local employment area which should be protected in the emerging LDP.
Rhos, Johnstown	The settlements are well served by Gardden Industrial Estate, Vauxhall Industrial Estate and Coppi Industrial Estate. These settlements, along with others, would also benefit if Ruabon Business Park could be brought forward for development. There is no evidence that additional provision is required.
Ruabon	The town is well served by Gardden Industrial Estate and Vauxhall Industrial Estate. This settlement, along with others, would also benefit if Ruabon Business Park could be brought forward for development. There is no evidence that additional provision is required.
Cefn-Mawr, Acrefair and	These settlements are served by existing employment areas.

Service Centre	Comment
Rhosymedre	Advance Park Industrial Estate appears to be an area in decline and WCBC should continue to monitor conditions here. Proposals for refurbishment and/or necessary redevelopment of premises should be encouraged, but policy should ensure that the bulk of the premises are protected for B-Class employment, which could extend to include an element of trade use on the road frontage. WCBC should work to ensure that a reasonable element of the Former Flexsys site, Ruabon Works is retained for B1/B2/B8 employment, to offset employment options which may be lost if that site is redeveloped for a mix of uses.
Chirk	Chirk is well served, both by Canal Wood Industrial Estate for reasonable quality, smaller business space and by Chirk Industrial Estate, which accommodates larger employers. It also benefits from its proximity to Oswestry. There is no evidence that this provision is insufficient to meet local needs. The key issue will be accommodating Kronospan's stated expansion needs. While recognising that there are some environmental issues to overcome it is recommended that the appropriateness of land to the north of Chirk Industrial Estate be considered in the emerging LDP, to support the specific growth of this key local business..
Rural South West	This rural location has no local employment areas while access to surrounding settlements is more constrained than in other parts of the County Borough. There is no evidence of any need for a dedicated employment area here. However, given the lack of local employment space rural planning policy should be sympathetic to appropriate farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Penley and the Rural South East (East of the River Dee)	This linear rural area is bounded by Wrexham Industrial Estate in the north west and by Whitchurch in the east. Both of these locations will provide substantial employment opportunities to local residents. However, within this area there is only one recognised employment area, Penley Industrial Estate. This estate is of budget quality and around a third of the units are vacant, including some partially derelict properties. The location is delivering only limited economic value at present and it is recommended that future rural planning policy prioritise the redevelopment of Penley Industrial Estate for an employment-led scheme which would deliver new B1/B2/B8 accommodation. The new space should seek to complement rather than compete with the far larger provision at Wrexham Industrial Estate, by providing smaller industrial units of less than 500 sqm and/or small office units of circa 93-186 sqm (reflecting current demand) which could meet the needs of local micro businesses who would wish to trade locally rather than moving to the nearby employment centres. Lightwood Green Industrial Estate, Overton is an active employment area which should be protected in the emerging LDP. All land appears to be in use at present, primarily for low density storage, however, if one of the employers vacates, then land may be available for infill development. This would potentially provide a second employment development opportunity site here. However, it is accepted that such a development would represent a substantial increase in the density of

Service Centre	Comment
	activity at this location and may generate issues of access, traffic and environmental impact.

Source: BE Group, 2014

Area Specific Conclusions – Flintshire

Deeside

10.113 Deeside is well established as a major manufacturing centre in North Wales with strong links top North West England. Future growth here will inevitably focus at the Deeside Enterprise Zone sites, specifically the 98 ha EM1.12 Land to North West of Garden City site, where the development of mixed use development, including some 130,000 sqm of new B1, B2, B8 floorspace and a new skills and training centre has begun. Interest from one large business, for land and premises here, has been identified and stakeholders are confident that a reasonably rapid rate of land take-up can be achieved over the lifetime of the scheme. A further 56 ha is available elsewhere in the area, primarily to support the expansion of existing large businesses.

10.114 Stakeholders did not identify any particular shortfalls in premises supply here, indeed with vacancy rates of around 19 percent the Deeside may be oversupplied in some areas. Change appears secure here and there appears to be little further public intervention required, beyond that already committed to in established policy.

Broughton

10.115 Over the past 15 years Airbus has invested some £2 billion (approx.) in new facilities at Broughton, meeting most of the requirements of this employer. Future growth within the plant will therefore be comparatively modest, but Airbus has no plans to release land and all facilities, including the runway, remain in use.

10.116 Airbus would also like to see the adjacent employment areas developed as a supplier village and this appears to be taking place, at least in part, at Hawarden Park/Chester Aerospace Park, which now accommodate a number of firms in the aerospace sector. Some 27 ha of development land remains here which is receiving interest and enjoying a reasonable rate of take-up. FCC should continue to monitor take-up at these locations to ensure sufficient land remains available over the lifetime of the study to meet the needs of businesses looking to invest here.

Warren Hall

10.117 EM2.1 Warren Hall remains a low development priority for the Welsh Government. FCC should continue to monitor conditions here and engage with the Welsh Government to determine its priorities. If the Welsh Government continues to show limited interest in delivery here, FCC should consider if it has the capacity to take a stronger role in the site. This could include taking the land under more direct control though freehold/leasehold purchase or some form of development agreement that would allow FCC to lead on marketing and managing the site.

10.118 Development viability could be improved through consideration of a revised development mix which includes a stronger element of higher value uses to offset any financial gap. This does not automatically mean housing but could include retail or leisure uses, appropriate to the location, which can also improve values. Hot food, a gym or hotel are examples of uses that both improve generate reasonable returns for developers and can improve the offer and attractiveness of a business park scheme. Some other options for supporting delivery here are discussed in Section 11.0.

Saltney/Sealand

10.119 A strong industrial area on the margins of Chester. The importance of this location, alongside Deeside and Wrexham Industrial Estate, is enhanced by the limited supply of industrial land within Chester city. The existing industrial estates here are increasingly filling up, although there remains a reasonable offer of vacant premises here. Thus, over the long term, the most important development opportunity is likely to be the 14.60 ha EM1. 24 Land East of Saltney Ferry Road site. There are some access issues associated with this land, but the site has outline planning permission for B1/B2/B8 uses and is being actively marketed as a new employment area for the County. The value of this location should be recognised and the land protected from loss for alternative uses.

10.120 The 18.50 ha EM2.2 DARA Site, is included within Flintshire's land supply. While this former RAF complex may include some viable employment sites, the area appears to

function (at least in part) as active industrial estate and the inclusion of the whole area as a strategic development site in the LDP does not appear to be justified. Further research is required to understand just what the real development opportunities are at this location.

Queensferry/Shotton/Connah's Quay

10.121 These settlements are well served by a number of large and well established industrial estates as well as their proximity to Deeside. These offer a good range of property options, including modern industrial units, trade counter space and small business workshops. Some 20 ha of employment land is potentially available here (although 12.50 ha of this is associated with the power station) alongside the much larger supply at Deeside.

10.122 However, it is worth noting that this study has identified regeneration opportunities within the employment areas here (discussed above). These brownfield sites could be brought forward comparatively quickly to meet needs and FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here, and elsewhere in the County.

Flint

10.123 Flint has a comparatively large offer of industrial premises relative to its size. While the property market is primarily local, there are a number of larger businesses are based in the town, including Kimberley Clark and SCA. Flint is a historic centre for the production of pharmaceuticals, food and paper products. Flint has seen little major investment in recent years but local demand remains healthy and vacant units usually let quickly.

10.124 The current land supply is limited to one planning consent (0.68 ha) for a builders merchants off Aber Road. However, this study has identified a number of smaller regeneration opportunities (discussed above), which could be brought forward comparatively quickly to meet needs. Where relevant these are informed by the Castle Park Industrial Estate Masterplan (2008). FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here, and elsewhere in the County.

Mold

10.125 Mold functions as a centre for service sector businesses in the County, including a range of micro and small businesses in the town's large rural hinterland. Mold is also a retail centre for Flintshire and there is demand for further retail units within the main business parks and industrial estates of the town.

10.126 Regeneration officers expressed concerns that some of the larger manufacturing businesses in Mold, including Jeyes Fluid and Tiger Tim, may be looking to reduce their local operations and relocate at least some facilities. The exact reasons for this are unclear, but the County should continue to engage with these businesses to identify what the concerns are.

10.127 Future demand in Mold is therefore likely to be for office (and retail) premises, something reflected in the comments of property agents. There will continue to be need for industrial premises for higher value manufacturing operations but it will be at a small scale compared to Deeside. Mold has a reasonable supply of employment land (11.34 ha) relative to its size although this includes some long term allocations, notably EM2.4: Mold Business Park Extension (5 ha) which is now proposed for social housing. FCC should continue to monitor land take-up in Mold and, given the wider oversupply of land in the County, avoid protecting sites which are not of market interest and may not be viable for B1/B2/B8 development.

Rural Areas and Small Settlements – Flintshire

10.128 As with Wrexham this section considers the smaller settlements and rural areas of Flintshire, considering the opportunities required to support rural diversification and sustainable communities.

10.129 Table 132 identifies some eight defined service centres, or logical groups of centres, and rural areas and provides an assessment of opportunities including, if required recommendations for land and premises provision. These are suggestions the County Council may wish to consider to help encourage diversification of the rural economy and sustainable economic growth for these settlements.

Table 132 – Flintshire – Other Rural Areas and Small Settlements' Assessment

Rural Service Centre	Comment
Gronant, Lanasa, Gwaenysgor,	Settlements here link closely to Prestatyn and Rhyl rather than employment areas further south in Flintshire.

Rural Service Centre	Comment
Trylawynd (the rural north)	There is no evidence of any need for a dedicated employment area here. However, given the lack of local employment space rural planning policy should be sympathetic to appropriate farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require. The growth of the Port of Mostyn (discussed below) would deliver economic benefits to this wider area.
Mostyn	The Port is performing well at present, providing land and dockside facilities to a range of wind energy operators. The Port of Mostyn is confident it can maintain its position as the primary Irish Sea port facility for offshore wind energy schemes and is seeking to grow the facilities it provides to this sector. The Port is currently applying to Natural Resources Wales to develop further berths along its water frontage. The Port also has the long term aspiration to develop some 12-16 ha of land to the north for a renewable energy manufacturing (and energy generation) park. This would, amongst other things, link turbine manufacture directly to the port facilities. It is accepted that there are significant policy and environmental issues to be overcome for such a proposal (the land in question sits within the Dee Estuary RAMSAR/SPA protected area). However, the scheme would provide a significant new employment area in the north of the County, which is distant from existing employment options further south.
Greenfield/Holywell	Greenfield Business Park is a major employment area on the Flint Coast, offering a wide range of industrial and office premises. The larger portion of the park is dominated by three large businesses – Kingspan, Westbridge Furniture and Safill Automotive. Both Kingspan and Westbridge Furniture have seen significant growth in recent years. Some 15 ha of employment land is potentially available here (although elements of this may not ultimately be deliverable) and the broader future of the area is seen to be secure. Both Greenfield Business Park and Manor Industrial Estate further south appear well occupied while the quality of land and premises is of reasonable quality although there are individual blocks or sites which could benefit from investment. Generally, there is no scope for significant land deallocations as all sites may be needed to support future growth.
The Rural East (including Caerwys, Carmel, Gorsedd, Cilcain)	A large rural area which separates the main settlements of central Flintshire to Denbigh and Ruthin. Consultations suggest that this area is served by the employment areas in Mold while access constraints reduce economic linkages to schemes in neighbouring Denbighshire. The area also has high levels of homeworking. There is no evidence of any need for a dedicated employment area here. However, given the lack of local employment space rural planning policy should be sympathetic to appropriate farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.
Halkyn	Halkyn benefits from its position on the A55 Corridor which gives it good access to the main settlements of the County, as well as to nearby Flint.

Rural Service Centre	Comment
	There is no evidence that additional provision is required.
Buckley	Buckley is well served by some four established employment areas, offering a range of (primarily) industrial space in range of sizes, qualities and tenures. In the north Spencer Industrial Estate is expanding around Globe Way. At Little Mountain Industrial Estate, previously vacant large premises are now occupied by Glen Dimplex There is no evidence that additional provision is required.
Northop/Flint Mountain/Northop Hall	These settlements benefit from their position on the A55 Corridor which gives it good access to the main settlements of the County, as well as to nearby Flint. There is no evidence that additional provision is required. At the Northop Educational Campus, Glyndwr University owns a large parcel of greenfield land here, extending across the A55. It would like to develop some of this land for additional lab space, residences and car parking. However, this would be subject to achieving capital receipts from land sales elsewhere.
Gwernaffield/ Gwernymynydd	These settlements form part of the catchment area for Mold and are served by employment areas here.
The Rural South (including Hope, Leeswood, Penyffrodd, Treuddyn, Higher Kinnerton	This rural location has no local employment areas while access to surrounding settlements is more constrained than in other parts of the County. There is no evidence of any need for a dedicated employment area here. However, given the lack of local employment space rural planning policy should be sympathetic to appropriate farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.

Source: BE Group, 2014

11.0 RECOMMENDATIONS

Introduction

11.1 This section sets out the recommendations arising from the Joint Employment Land Review. The recommendations in this report have had full regard to the requirements of Welsh planning policy to encourage and deliver growth through the planning system.

Employment Land Supply

Employment Land Provision Definition

11.2 PPW defines economic development as *"development of land and buildings for activities that generate wealth, jobs and incomes. Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism, and public services."*

11.3 For the purpose of this study the current available local land supply in the study area is defined as the 79 sites identified from remaining allocated employment sites and land with extant planning consents, updated to 31 March 2014. These total 531.04 ha and comprise:

- 204.91 ha on 44 sites in Wrexham
- 326.13 ha on 35 sites in Flintshire.

11.4 Analysis of this supply suggests that some 190.29 ha is already developed, constrained, held as expansion land or otherwise unavailable. The realistic land supply is therefore judged to be 303.99 ha – 80.05 ha (20 sites) in Wrexham, 223.94 ha (22 sites) in Flintshire.

Recommendation 1 – Future Employment Land Provision

Wrexham

11.5 In Wrexham the identified realistic land supply of 80.05 ha, at 31 March 2014, suggests a surplus of 44.92 ha when measured against the projected growth of employment in industry sectors (high growth scenario 35.13ha). Against the net forecast requirement, i.e. sectors forecast to grow against those predicted to decrease (low growth -5.44ha), the surplus increases to 85.49 ha. Based on an

analysis of long term employment land take up (at an average take-up rate of 3.9 ha/year) the surplus is 13.75 ha.

11.6 The weight of the evidence points towards taking the high growth estimate. This is not consistent with the baseline net assessment but there is consistency between what is required with regards to the scale of employment growth – and this appears to be consistent with the calculations for the past trend in Wrexham (i.e. that completions follow the expected land requirements according to the scale of employment growth). Moreover where there is sectoral switch between what is retrenching and what is growing then clearly transferability of land and space may not be possible which de facto implies the need for new space.

11.7 **It is therefore recommended that Wrexham County Borough Council use the projected growth of employment in industry sectors as the main measure of Wrexham's future land needs for the period up to 2030. This indicates a minimum need for some 2 ha/year (or 2.33 ha/year if split exactly) – although a more optimistic approach would allow 2-3 ha/year taking account of past performance and the benchmark levels. The total need for the LDP period is therefore some 35.13 ha.**

11.8 However, using any of the three measures of need still indicates that there is a substantial surplus of employment land in the County Borough (13.75- 85.49 ha when measured against the realistic supply) and thus there is no immediate need for WCBC to identify further land allocations for B1, B2 and B8 uses. Sites which could be deallocated (or reallocated to other uses) from the overall supply are considered further below.

11.9 The exception is in Wrexham Industrial Estate where high demand (including inward investment requirements and the expansion needs of existing large firms), combines with a constrained overall land supply (which sees at least half the land supply unavailable) plus ecological constraints on a portion of the remainder. Also as most sites have some plans for change and/or planning consents associated with them, or are held for the expansion of specific firms, there is a shortage of readily available land on which to create an 'offer' for the future marketing of the estate to inward investors or existing businesses.

11.10 The evidence therefore suggests that there is a need to allocate further land at Wrexham Industrial Estate, in the LDP, to provide sites which can meet both the needs of existing firms and be marketed to future inward investors.

11.11 **In order to address this issue, consideration should be given to identifying additional land on Wrexham Industrial Estate exclusive of ecological mitigation, which may require the provision of mitigation land elsewhere.**

11.12 It is recognised that additional land allocated here, or anywhere else, will need to be assessed by the local planning authority.

11.13 As noted in Section 9.0, detailed comparison between the research findings and Welsh Government household and population growth figures is not possible within this study. It is therefore recommended that the two local authorities undertake **further research to bridge the gap between Welsh Government statistics and this study, to produce more comprehensive linked figures between the employment land requirements and how these relate to the population and household projections.**

The Needs of Non-B Class Uses

11.14 Forecasting suggests a need for 27.06 ha of additional health related land and 20.00 ha of land for education related uses. However, stakeholder consultations do not support land allocations of anything like this size, particularly given that higher and further education providers are consolidating their landholdings rather than looking to expand. Large scale developments in the health sector are already agreed and underway.

11.15 The future land needs for small scale clinics or school facilities will need to be agreed with local education and health providers and will be also determined, at least in part, by the level of new housing growth which occurs in the County Borough. However, given the small scale of any facilities it is unlikely that more than **3-4 ha** will be needed over the LDP period to accommodate local health and education needs. It is not envisaged that any of this development will take place on land presently

proposed for B1/B2/B8 uses and losses from the (realistic) land supply for health and education needs are likely to be negligible.

Flintshire

11.16 In Flintshire the identified realistic land supply of 223.94 ha, at 31 March 2014, suggests a surplus of 195.44 ha when measured against the projected growth of employment in industry sectors. Against the net forecast requirement, i.e. sectors forecast to grow against those predicted to decrease, the surplus increases to 243.04 ha. Based on an analysis of long term employment land take up (at an average take-up rate of 5.5 ha/year) the surplus is 141.44ha.

11.17 Again the weight of the evidence points towards taking the baseline growth estimate. This is felt to be a reflection of the past scale of employment growth and calculations for the past take up trend in Flintshire (i.e. that completions follow the expected land requirements according to the scale of employment growth).

11.18 **It is therefore recommended that Flintshire County Council use the projected growth of employment in industry sectors as the main measure of Flintshire's future land needs for the period up to 2030. This indicates a minimum need for some 2 ha/year (or 1.9 ha/year if split exactly) – although a more optimistic approach would allow 2-3 ha/year taking account of past performance and the benchmark levels, as well as acknowledging that the smaller land deals are no longer recorded by FCC. The total need for the LDP period is therefore some 28.50 ha.**

11.19 However, using any of the three measures of need still indicates that there is a substantial surplus of employment land in the County and thus there is **no immediate need for FCC to identify further land allocations for B1, B2 and B8 uses (other than those already allocated) in the emerging LDP.**

The Needs of Non-B Class Uses

11.20 Forecasting suggests a need for 2.35 ha of additional health related land and 4.71 ha of land for education related uses. Stakeholder consultations suggest that the only large scale development for education purposes likely to occur over the LDP period will be the growth of the Northop Campus onto adjacent land. Elsewhere, future land

needs will be for small scale clinics or school facilities, the exact provision of which will need to be agreed with local education and health providers and will be also determined, at least in part, by the level of new housing growth which occurs in the County.

11.21 Given the small scale of any facilities the forecast land needs - **2.35 ha** for health related land and **4.71 ha** for education would appear realistic and could be accepted as provisional land targets, subject to more detailed clarification with local providers.

Recommendation 2 – The Retention of Employment Sites and Areas

General Guidance

11.22 The general recommendation of this study is that Wrexham County Borough Council and Flintshire County Council should, over the long term at least, be looking to protect (and in some locally specific circumstances increase) their land supply rather than release land for alternative uses. TAN23 sets criteria by which existing employment sites could be released for other uses. I.e. land should only be reallocated if**:**

- *"They have poor prospects of being re-occupied for their previous use*
- *And/or the particular market that the site is part of is oversupplied*
- *And/or the existing employment use has unacceptable adverse impacts on amenity or the environment*
- *And the proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained*
- *Or other priorities, such as housing need, override more narrowly focused economic considerations."*

11.23 More specifically, non-B Class uses should only be allowed on existing sites if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. The use for employment purposes other than B Class uses may be appropriate but only if it can be shown that the use provides on-site support facilities or demonstrates an economic enhancement over and above B Class uses. Such development should however not prejudice the efficient and effective uses of the remainder of the employment area.

11.24 Retail uses should not generally be supported on employment sites. Exceptionally, uses which have trade links with employment uses or are un-neighbourly in character (such as car showrooms, tyre and exhaust centres, or trade counters) may be permitted on employment sites which have good access to a range of sustainable transport options.

11.25 Where non-B Class uses are proposed for, or within, those sites then the two Councils should require the applicants to demonstrate that:

- the site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and
- the site/premises has been proactively marketed for employment purposes for a reasonable period of time (a minimum of twelve months) at a reasonable market rate (i.e. rent or capital value) as supported through a documented formal marketing strategy and campaign; or,
- there will be a significant community benefit which outweighs the impact of losing the employment site/premises.

11.26 At Appendix 13 Developer Marketing Standards are set out that provide the template for delivering the evidence that premises or sites have been appropriately marketed without success. Whilst these are primarily directed at B Use Class situations they are equally applicable to other property types e.g. public houses, retail outlets.

11.27 On land within existing employment areas, outside of the main employment sites, a more flexible approach could be taken to help facilitate a broad range of economic development. In some cases, the size, location and characteristics of a site may mean that a more intensive mixed-use development could provide greater benefit to the local community, in terms of addressing local needs, than if the site was retained solely in employment use. However, the Councils should look to ensure that any proposal for mixed-use redevelopment, incorporating both employment and non-employment uses, must retain an equivalent amount of jobs on the site. Where a site is vacant or underused then consideration should be given to its potential for job creation rather than the existing number of jobs. The Councils should also ensure that any such use (for example a noise sensitive use such as residential) does not prejudice the future operation of adjacent or adjoining employment uses.

11.28 The Councils should also recognise the increasing level of precedents of non-B use employment activity provision within employment areas across the UK. Sui generis uses, such as vets practices, and D1 non-residential institutions including training centres, nurseries/children's play facilities and activity centres do generate employment opportunities. Such applications within the Counties should be treated on their individual merits, including employment outputs, but should not result in the loss of allocated employment sites.

11.29 This advice is offered without consideration of other planning, traffic/highways issues, etc which might render some uses or mixed use developments inappropriate on particular employment sites. It is clearly for the two Councils to judge proposals on their merits taking account of these factors.

11.30 Area specific recommendations on Wrexham County Borough, apart from Wrexham Industrial Estate which is discussed above, are set out in Table 133.

Table 133 – Wrexham Site/Area Specific Recommendations

Site/Area	Comment
Llay Industrial Estate	With the exception of site E1. 28 protect the remaining employment land here for B1/B2/B8 uses. Review the constraints and issues associated with site E1.31 Llay Industrial Estate (6.40 ha) to determine if the site is viable.
Wrexham Town	It is expected that 4.05 ha of land at Wrexham Gateway will be taken up in 2016. A further 4.75 ha remains available for development here, subject to improvements to the A483 junction and is receiving interest from potential occupiers. Given the current oversupply of land across the County Borough, this study cannot recommend the provision of further land here at this time. However, once the remaining 4.75 ha is taken up a local demand appraisal should be undertaken to see if there is a case for the provision of further B1 land here. In, and around, Wrexham Town Centre demand may support modest new developments for B1(ii) offices. These may be in the form of individual premises for owner occupation or larger multi-let (serviced or unserviced) schemes, possibly linked to larger town centre regeneration programmes. It is recommended that provided such schemes remain of a comparatively modest scale, and do not significantly add to the supply of employment land in the County Borough, that they be considered on their individual merits Cambrian Price Industrial Estate, Rivulet Road is identified as a long term regeneration opportunity for the town. Any redevelopment scheme should include an element of B1/B2/B8 uses, to replace that which would be lost.
Rural East (from Gresford south to	If it remains vacant consider Pickhill, Cross Lanes as a rural regeneration opportunity.

Site/Area	Comment
the River Dee)	
Gresford/Marford	Protect existing employment areas.
Rosset/Lavister, Burton	Rossett Business Village should be protected in the LDP.
Bradley, Rhosrobin, New Rhosrobin	Protect existing employment areas.
Gwersyllt (including Summerhill)	Protect existing employment areas.
Broughton (New Broughton, Pentre Broughton), Brynteg, Brymbo	Employment uses have been consented on the Steelworks site, Brymbo for 18 years, with no evidence that these uses will ultimately be delivered. WCBC needs to engage with the owners of the former and seek stronger assurances that B-class employment uses will ultimately be delivered here. Also to identify what efforts are being made to market this land to employment occupiers and developers. If such assurances cannot be obtained and/or that, despite appropriate efforts in marketing, there appears to be no demand for employment uses here then it is not recommended that WCBC continue to protect the land indefinitely. It is accepted that Broughton, Brynteg and Brymbo lack employment options at this time and if B1 uses cannot be delivered here, WCBC is encouraged to find an alternative site of comparable size.
Tanyfron/Southsea	Encourage the reuse of the remaining vacant properties at Southsea Industrial Estate.
The rural west (extending from Bwylchgwyn in the north to Trevor in the south)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Coedpoeth, Minera	Protect existing employment areas.
Rhostyllen, Bersham	Protect existing employment areas. Planning policy should separate the three distinct parts of Croesfoel Industrial Estate (roadside services, motor retail and industrial/warehousing) in the emerging LDP, with the goal of protecting the larger industrial/warehouse premises in the north from loss to alternative uses. Pulestone Industrial Estate is a small but active budget quality local employment area which should be protected in the emerging LDP.
Rhos, Johnstown	Protect existing employment areas.
Ruabon	Protect existing employment areas.
Cefn-Mawr, Acrefair and Rhosymedre	Protect existing employment areas. Advance Park Industrial Estate appears to be an area in decline and WCBC should continue to monitor conditions here. Proposals for refurbishment and/or necessary redevelopment of premises should be encouraged, but policy should ensure that the bulk of the premises are protected for B-Class employment, which could extend to include an element of trade use on the road frontage. WCBC should work to ensure that a reasonable element of the Former

Site/Area	Comment
	Flexsys site, Ruabon Works is retained for B1/B2/B8 employment, to offset employment options which may be lost if that site is redeveloped for a mix of uses.
Chirk	Protect existing employment areas. While recognising that there are some environmental issues to overcome it is recommended that the appropriateness of land to the north of Chirk Industrial Estate be considered in the emerging LDP, to support the specific growth of this key local business.
Rural South West	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be supported to expand or redevelop premises.
Penley and the Rural South East (East of the River Dee)	Support the redevelopment of Penley Industrial Estate for an employment-led scheme which would deliver new B1/B2/B8 accommodation. Protect Lightwood Green Industrial Estate, Overton as an employment area in the LDP. Consider the appropriateness of allowing higher density infill development at this location to boost its employment potential.

Source: BE Group, 2014

11.31 Area specific recommendations on Flintshire County are set out in Table134.

Table 134 – Site/Area Specific Recommendations

Site/Area	Comment
Deeside	Growth proposals are well established and underway, no additional public intervention is required.
Broughton	Support Airbus's ongoing plans for change and growth Support the development of a supplier village at Hawarden Park/Chester Aerospace Park FCC should continue to monitor conditions at EM2.1 Warren Hall and engage with the Welsh Government to determine its priorities. If appropriate, FCC should seek a stronger role in delivery here. Also if there is no longer a strong prospect for a wholly B1/B2/B8 scheme here then further research would be required to determine if a broader mix of uses, appropriate to the location, could provide a viable development.
Saltney/Sealand	Recognise the growing importance of EM1. 24 Land East of Saltney Ferry Road as a key allocation serving both Flintshire and Chester. Work to overcome any access issues which may exist here. Review conditions at EM2.2 DARA Site to determine the real level of employment land availability at this location.
Queensferry/Shotton/ Connah's Quay	Notwithstanding the wider oversupply of employment land in Flintshire, brownfield regeneration opportunities are identified within local employment areas which could be brought forward comparatively quickly to meet needs and FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here.

Site/Area	Comment
Flint	The current land supply is limited to one planning consent (0.68 ha) for a builders merchants off Aber Road. However, this study has identified a number of smaller regeneration opportunities (discussed above), which could be brought forward comparatively quickly to meet needs. Where relevant these are informed by the Castle Park Industrial Estate Masterplan (2008). FCC should support proposals for B1/B2/B8 development that would maximise the use of employment land here, and elsewhere in the County.
Mold	Continue to engage with local businesses, particularly the identified larger manufacturing firms which may be lost to the town Monitor long term land allocations in Mold. Given the wider oversupply of land in the County, FCC should avoid protecting sites which are not of market interest and may not be viable for B1/B2/B8 development.
Gronant, Lanasa, Gwaenysgor, Trylawynd (the rural north)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.
Mostyn	Subject to environmental and other constraints support the growth of the Port of Mostyn, particularly where proposals would deliver active new business space, diversifying the Port from simply being a freight transhipment facility.
Greenfield/Holywell	Protect Greenfield Business Park, support proposals for further investment and particularly schemes that would deliver new high quality premises or refurbish existing space.
The Rural East (including Caerwys, Carmel, Gorsedd, Cilcain)	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.
Halkyn	-
Buckley	Protect existing employment areas
Northop/Flint Mountain/Northop Hall	Support the growth and diversification of Northop Educational Campus.
Gwernaffield/ Gwernymynydd	-
The Rural South (including Hope, Leeswood, Penyffrodd, Treuddyn, Higher Kinnerton	Support appropriate rural development proposals including farm conversions/diversifications which could deliver property options. Subject to other planning matters local businesses should be allowed to expand or redevelop premises as they require.

Source: BE Group, 2014

Employment Sites for Retention and Release

11.32 As TAN23 notes, employment sites should only be retained if they are viable and deliverable. In addition to sites already developed or held for the expansion of specific firms, this study has identified a number of sites which are unlikely to ever be developed for B1/B2/B8 uses. These are:

Wrexham

- Site B: Cefn Park, Redwither Road, Wrexham Industrial Estate (11.50 ha) – Part of a larger wildlife site with a wide range of ecological constraints which render the site undevelopable for B1/B2/B8 uses
- Site G Redwither Road(i), Wrexham Industrial Estate (0.99 ha) – Land could not be developed without the loss of much of the established woodland and the likely interference with the wildlife corridor.
- E1.6: Bryn Cottages, Wrexham Industrial Estate (3.60 ha) – Suggested by Council ecologists as a possible ecological refuge/mitigation site
- E1.8: Clywedog Road North, Wrexham Industrial Estate (1.90 ha) – Owner has aspirations to develop this land for services along with the neighbouring site (Site 9). Ecological issues may also make development difficult
- E1.9: Clywedog Road North, Wrexham Industrial Estate (2.20 ha) – Owner has aspirations to develop this land for services along with the neighbouring site (Site 8). Ecological issues may also make development difficult
- E1.15: Former Tetra Pak, Wrexham Industrial Estate (2.90 ha) – Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this land retained as an ecological mitigation site. However, it should be noted that the owners are seeking to dispose of this site as a development opportunity
- E1.25: Llay Industrial Estate (3.30 ha) – North Wales Police intend to build a new custody suite and offices here (Use Class C2A Secure Residential Institution)
- E1.26: Llay Industrial Estate (2.90 ha) – North Wales Police intend to build a new custody suite and offices here (Use Class C2A Secure Residential Institution)
- E1.28: Llay Industrial Estate (1.40 ha) – Site is bounded by other ownerships and may be inaccessible
- Site Hi: Bridge Road (Firestone Site), Wrexham Industrial Estate (26.00 ha) – Has consent for, and is under development for, a prison

- Site Hii: Bridge Road (Firestone Site), Wrexham Industrial Estate (20.10 ha) – The bulk of this site will be retained to provide ecological mitigation associated with the adjacent prison scheme. However, adjacent owner F Lloyd Penley also has a requirement for some 2.4 ha of land here which also needs to be accounted for.

Flintshire

- EM2.2: DARA Site, Sealand (18.50 ha) – Site comprises a complex of buildings, much of which appears to be in use. Further assessment needed to identify the real developable area here. The viability/deliverability of land here should also be explored. It is considered likely that such a review will show that the majority of this land is not viable for development.
- EM2.4: Mold Business Park Extension, Mold (5.00 ha) – Now proposed for social housing under the SHARP programme.

11.33 **It is therefore recommended that, subject to other planning considerations, Wrexham County Borough Council and Flintshire County Council deallocate (or reallocate to other uses) the above sites from B1/B2/B8 use. This does not preclude the possibility that some element of B-Class employment could still be delivered in these locations as part of a wider mixed-use scheme on some sites.**

11.34 In the case of Flintshire, further dialogue with Welsh Government is recommended on site EM2.1: Warren Hall, Broughton (36.50 ha) to confirm that this allocation remains a viable development site which the Welsh Government is interested in bringing forward. If this does not prove to be the case then FCC should consider if it has the resources and capacity to take a stronger role in development. In addition, further consideration needs to be given to broadening the mix of uses permissible, appropriate to the location, to ensure a viable development here.

11.35 Some other accepted methods for public sector agencies to encourage site delivery are shown in Table 135. These could be applicable to Warren Hall or indeed any other large site in the study area where the two Councils are looking to encourage development.

Table 135 – Delivery Mechanisms

Mechanism	Description
Low Level Public Support	Public sector support does not always mean large scale investment. Sometimes a landowner may simply be unaware of the full potential of his site, level of market demand or how site constraints can be overcome. An increasingly common approach therefore is for local authorities to assume some of the initial research costs, producing for example a planning brief or masterplan to show the owner/developer what is possible and prompt development. Support on site/area marketing may also be welcome.
Joint Venture Agreement	A defined agreement between public sector agencies and private developer partners. It is most commonly used where land is, at least in part, owned by the public sector. The Public sector can then support development by inputting the land at low or nil value or by seeking out infrastructure funding. Such a Joint Venture partnership can take a number of forms: • Contractual Partnership – Normally a short term arrangement where the parties enter into a contractual arrangement where one party, usually the developer, will deliver. It would relate to the most straightforward developments. • Joint venture through formation of a limited company formed through share issue - A common arrangement where each party will put in an element of cost and risk, and the return reflects the share. The Council may put in land and/or capital, the developer will often meet development costs. The arrangement may see proceeds distributed in different ways. This could be a revenue share, or a share on sale of the investment. The party taking the greater level of risk will normally have first call on the profit. • Company limited by guarantee – Tends to be more for non-profit making arrangements, and can introduce a number of partners to the company. This arrangement is more likely to be suitable for marketing and promotion of regeneration schemes rather than a joint venture to deliver development.
Direct Public Support	While this may be in the form of direct development funding, in these times of more constrained public finance, more complex methods can be used. For example the public sector may agree a long term lease on a development, underwriting the developers rent returns and taking on the risk of sub-letting the space to occupiers.
Annuity Rent	This is also increasingly used to support investments by pension funds and other major financial institutions into developments. The institution will fund the development in exchange for a lease of circa 35 years and an annuity rent payed by the developer/owner. This would be a low but secured rent over the time period with agreed uplifts. The developer can then sub-let at market value to obtain a profitable rent. At the end of the 35 years the property will revert to the developer/owner for £1 and the developer/owner retains the long term asset value (see the Case Study).
Revolving Infrastructure Fund	A method for paying for supporting infrastructure development on sites with otherwise good development potential. The public sector may use a range of funding and Prudential Borrowing to provide funds in exchange for a long term payback of Business Rate and associated income uplift. Where development is BREAAM Excellent, 100 per cent of business rate levied can now be retained by the borrowing agency.*

Source: BE Group, 2015

**At the recent Conservative Party Conference, the Chancellor set out proposals which would allow Local Authorities to retain 100 percent of Business Rates raised locally. If this became legislation, and subject to any limitations and responsibilities associated with it, as well as any variations for Wales, it would increase the stock of funds against which Local Authorities could borrow against, through mechanisms such as those described above.*

11.36 Elsewhere, unless an employment site already has consent for other uses, the presumption is that identified employment land should be protected for (primarily) B1/B2/B8 employment. It is accepted, however, that changing circumstances may justify the release of further employment sites in the future. In the case of Wrexham, issues justifying further land loss may include clarification of ecological issues at Wrexham Industrial Estate.

11.37 A full list of all employment sites, whether they are truly available and recommendations as to whether they should be allocated in emerging LDPs in provided in Appendix 14.

Employment Areas for Retention and Release

11.38 Tables 67 and 68 of Section 6.0 review the study area's 61 identified Employment Areas and, as well as identifying regeneration opportunities, provides a grading A-E of those areas. The recommendations associated with each grade are set out in Table 133 above**. 52 of the areas achieve a grade A to C and should continue to be protected through the two LDPs. In the case of Wrexham, 23: Lightwood Green Industrial Estate, Overton; 24: Llay Hall Industrial Estate and Riverside Business Park and 27: Rossett Business Village, Rossett/Lavister are active employment areas which should be protected in the emerging LDP.**

11.39 **Strong protection should be given to the ten locations which achieved a grading of A or B. These high scoring locations are:**

Wrexham

- **1: Wrexham Industrial Estate**
- **2: Llay Industrial Estate, Llay**
- **7: Gresford Industrial Estate, Wrexham Town**
- **10: Wrexham Technology Park, Wrexham Town**
- **25: Chirk Industrial Estate, Chirk.**

Flintshire

- **EM3 (Development Zone): Deeside Development Zone**
- **EM3 (Development Zone): Hawarden Industrial Park, Chester Aerospace Park and Airport Development Zone (Airbus), Broughton**

- **EM3, Principal Employment Area 1 and 10: Greenfield Business Park, Greenfield**
- **EM3, Principal Employment Area 8: St Davids Park, Ewloe**
- **EM3, Principal Employment Area 11: Ashmount Industrial Estate, Flint.**

11.40 **In Wrexham there are five low scoring locations which, over the longer term, could be considered for reuse and/or redevelopment for other an appropriate uses. These are:**

- **13: Advance Park Industrial Estate, Rhosymedre, Cefn/Acrefair**
- **15: Cambrian Price Industrial Estate, Rivulet Road, Wrexham Town**
- **17: Penley Industrial Estate, Penley**
- **19: Southsea Industrial Estate, Southsea**
- **28: Pickhill Cross Lanes, Cross Lanes.**

Recommendation 3 – Monitoring and Future Reviews

11.41 Whilst both Wrexham and Flintshire does have a surplus of land at present, the proposals identified in this study could, in the case of Wrexham at least, erode that excess. There are also local areas of need which are discussed above. In view of these factors it is important that Wrexham County Borough Council and Flintshire County Council fully understand their employment land and premises portfolio and how that portfolio changes over time. This requires ongoing supply monitoring, considering not just the take up of identified employment land, but other key issues such as:

- The churn of existing employment land in Employment Areas – This study has provided a snapshot of conditions and availability within the 61 identified Employment Areas. However, in reality there will be an ongoing churn of land and premises, which will create new employment development sites while removing others. As most business relocation and expansion activity will take place within existing industrial estates and business parks, a full understanding of changing conditions is essential
- Small business demand – Although the study area is attracting demand from larger employers, most land and premises demand (including inward investment demand) will be from micro to medium sized businesses. An understanding of the specific needs of such businesses is therefore essential to understanding land and property demand in the Counties. It is particularly key in understanding any issues of obsolescence in the study area's land and

property supply, where premises/sites are no longer able to meet modern occupier needs. **In the case of Flintshire there is also the need to ensure that smaller developments are included in take up monitoring to ensure that the Council has a comprehensive picture of economic change in the County**.

- Displacement of employment uses – Where employment land is lost to alternative uses and/or a large parcel of land is taken up by a single occupier it is important to understand the 'domino' effect as businesses who had been located on that land, or were intending to locate there, have to seek accommodation elsewhere (which may, in turn, displace others)
- Monitoring of job densities and plot ratios – Section 9.0 uses local job density and plot ratios, taken from the Company Survey returns to understand the land and property needs of different business sectors. However, in reality job and plot densities change, reflecting local circumstances, and as businesses update the operational practices and seek to use land and property more efficiently. The Councils should therefore seek to monitor the proportion of floorspace developed per hectare, and the number of jobs created, in planning consents for premises in different business sectors. This would help the Councils better understand capacity of sites, the employment generating potential of the land supply and to identify opportunities to maximise job provision on key sites.

11.42 **Monitoring is an ongoing activity but it is also recommended that the Councils undertake a more detailed review of its employment land portfolio at intervals of around three years. This is broadly in accordance with Planning Policy Wales, which recommends regular monitoring and review of the local land supply to ensure a robust evidence base.**

Recommendation 4 – Maintain Awareness of External Influences

11.43 Wrexham County Borough Council and Flintshire County Council must recognise their role, together with the other Mersey-Dee and North Wales authorities, in developing the economy of the sub-region. In this respect they are interconnected, to varying degrees, on a number of levels.

11.44 For example, and notwithstanding previous research and sub-regional study, there appears to be little understanding of the economic linkages of the A55 Corridor

amongst the North Wales local authorities which share this corridor. Thus, for example, Denbighshire appears to have little awareness of how it links to Flintshire, and vice-versa. This is a linkage which needs to be better understood in order for the various North Wales authorities to properly plan a common approach to this road corridor.

11.45 There is also a need for Flintshire and Wrexham to consider cross boundary issues in the Deeside, Saltney and Sealand areas, where industrial activities overlap with those of Cheshire West and Chester.

11.46 **Wrexham County Borough Council and Flintshire County Council should continue to monitor activity outside of the study area and seek to maintain links with neighbouring authorities, and with each other, to ensure a joined up approach to employment matters and economic development across the Mersey-Dee/North Wales sub-regions.**

Appendix 1 – List of Consultees

Wrexham
Avox
Cefn Mawr Community Council
Cefn Park
FI Real Estate
Gresford Community Council
Hurstwood
JCB
Kingmoor Park Properties (via HOW Planning)
Kronospan
Llay Community Council
Magellan Aerospace
Pochin
Prospect Estates
Sharp Electronics
Winnstay Farming Company (via Foresters)
Wrexham County Borough Council.

In addition, questionnaire surveys issued to:
34 Town and Community Councils and
320 companies.

Flintshire
2 Sister Poultry
Airbus
BASF Coatings
Convatec
Farmers Bay
Flintshire County Council
Hawarden Estate (via William Hall & Co.)
Kingspan
Knauf Insulation
Pochin Developments
Tata Steel
The Port of Mostyn
Toyota
UPM Shotton
Whitley Group.

In addition questionnaire surveys issued to 34 Town and Community Councils and to 380 companies.

Both
Cheshire West and Chester Council
Coleg Cambria
Conwy County Borough Council
Beresford Adams
Betsi Cadwaladr University Health Board

Bolton Birch
Denbighshire County Council
Glyndwr University
Guy Woodcock
Gwynedd Council
Isle of Anglesey County Council
Jones Lang LaSalle
Knight Frank
Legat Owen
Lambert Smith Hampton
Mason Owen
Mersey Dee Alliance
Powys County Council
Shropshire Council
Wirral Metropolitan Borough Council
Welsh Government.

Appendix 2 – Wrexham Vacant Property Schedules

Table A2.1 – Schedule of Industrial Premises

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit AL02A	Alyn Industrial Estate	Wrexham	Leasehold	Budget	145
Unit B, Heritage Oak Workshops	Alyn Industrial Estate	Wrexham	Freehold	Good	153
Unit 17	Bersham Enterprise Centre	Rhostyllen	Leasehold	Average	186
Unit 2	Carlton Garden Centre	Llay	Leasehold	Good	55
Unit 1	Carlton Garden Centre	Llay	Leasehold	Average	56
Unit 1, Former Schappe Building	Llay Industrial Estate	Llay	Leasehold	Good	55
Unit 15, Miners Road	Llay Industrial Estate	Llay	Leasehold	Good	61
Miners Park	Llay Industrial Estate	Llay	Freehold	Average	94
Unit 13, Miners Road	Llay Industrial Estate	Llay	Leasehold	Average	109
Unit 18, Miners Road	Llay Industrial Estate	Llay	Leasehold	Average	109
Unit 4, Miners Way	Llay Industrial Estate	Llay	Leasehold	Good	109
Unit 5, Miners Way	Llay Industrial Estate	Llay	Leasehold	Good	109
Unit 9, Pinfold Lane	Llay Industrial Estate	Llay	Leasehold	Average	268
Unit 4, Miners Way	Llay Industrial Estate	Llay	Leasehold	Average	269
Unit B, Davy Way	Llay Industrial Estate	LLay	Leasehold	Average	288
Former Schappe Building	Llay Industrial Estate	Llay	Leasehold	Budget	6,039
Former Arvin Meritor, Rackery Lane	Llay Industrial Estate	Llay	Leasehold	Budget	18,116
App Chem House	N/A	Llan-Y-Pwll	Freehold	Budget	2,023
Unit 10b, Bryn Y Pys Homes Farm	N/A	Overton	Leasehold	Average	111
Unit 10c, Bryn Y Pys Homes Farm	N/A	Overton	Leasehold	Average	111
Unit 2A, Bryn Y Pys Home Farm	N/A	Overton	Leasehold	Budget	171

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Former Queensway Garage	N/A	Queensway	Leasehold	Budget	555
8B Bryn Y Pys Home Farm	N/A	Wrexham	Leasehold	Budget	56
Park Garage, Brook Street	N/A	Wrexham	Leasehold	Average	83
Smithfield Garage, High Town Road	N/A	Wrexham	Leasehold	Average	891
Unit 6B, Elm House	Pandy Business Park	Wrexham	Leasehold	Good	122
Unit 3	Rhosddu Industrial Estate	Rhosddu	Leasehold	Good	204
Unit 4, Clwyd Court	Rhosddu Industrial Estate	Wrexham	Leasehold	Average	164
Unit B	Rhosddu Industrial Estate	Wrexham	Leasehold	Average	229
Unit 3	Riverside Business Park	Wrexham	Leasehold	Average	100
Riverside Business Park, Cefn Y Bedd	Riverside Business Park	Wrexham	Freehold	Budget	241
Unit 34	Wrexham Industrial Estate	Wrexham	Leasehold	Average	140
Unit A, Bryn Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	145
Unit H, Bryn Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	163
Unit 15 Ridley Wood Industrial Complex	Wrexham Industrial Estate	Wrexham	Freehold	Average	188
Unit 14, Bridgeway Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Average	222
Unit 14, The Bridgeway Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	222
Unit 3, Bridgeway Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	224
Unit 13, Ridleywood Industrial Complex	Wrexham Industrial Estate	Wrexham	Leasehold	Average	234
Unit 19, The Bridgeway Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	239
Unit 20, The Bridgeway Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	239
Unit Q2, Bryn Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	254
Unit 103	Wrexham Industrial Estate	Wrexham	Leasehold	Average	275
Unit 5 Ash Road,	Wrexham	Wrexham	Leasehold	Average	413

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
	Industrial Estate				
Unit 6, Ash Road	Wrexham Industrial Estate	Wrexham	Leasehold	Average	414
The Apex Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Average	492
Units 65/66	Wrexham Industrial Estate	Wrexham	Leasehold	Average	709
Unit 7 Ash Road South	Wrexham Industrial Estate	Wrexham	Leasehold	Average	778
Unit F, Bryn Business Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	1,227
Unit 108, Abbey Road South	Wrexham Industrial Estate	Wrexham	Either	Budget	1,600
Unit 4, First Avenue, Redwither Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	2,654
Units 36-40, Abenbury Way	Wrexham Industrial Estate	Wrexham	Either	Budget	17,781

Source: BE Group, 2014

Table A2.2 – Schedule of Office Premises

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit D	Brymbo and Tanyfron Enterprise Centre	Wrexham	Leasehold	Average	13
Suite 15	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	29
Unit 3a	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	65
Unit 3b	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	70
Unit 3c	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	44
Unit 3d	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	18
Unit 4	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	64
Unit 7	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	61
Unit 9	Bryn Estyn Business Centre	Wrexham	Leasehold	Average	18
Coppi Industrial Estate, Rhosllanerchrugog	Coppi Industrial Estate	Wrexham	Either	Budget	2,981
Suite A, Five Crosses Point	Five Crosses Industrial Estate	Minera	Leasehold	Average	28
Suite B, Five Crosses Point	Five Crosses Industrial Estate	Minera	Leasehold	Average	44
Suite C, Five Crosses Point	Five Crosses Industrial Estate	Minera	Leasehold	Average	64
Suite D, Five Crosses Point	Five Crosses Industrial Estate	Minera	Leasehold	Average	67
Unit 1, Former Schappe Building	Llay Industrial Estate	Wrexham	Leasehold	Budget	118
Llay Business Centre	Llay Industrial Estate	Wrexham	Leasehold	Average	14
1 Church Road, Southsea	N/A	Wrexham	Leasehold	Good	9
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	18.5
Unit 4, 27/29 Grosvenor Road	N/A	Wrexham	Leasehold	Average	19
Unit 2, 27/29 Grosvenor Road	N/A	Wrexham	Leasehold	Average	24
Unit 3, 27/29 Grosvenor Road	N/A	Wrexham	Leasehold	Average	24
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	27.4

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit 1, 27/29 Grosvenor Road	N/A	Wrexham	Leasehold	Average	32
Unit 3, Ney Court, Yorke Street	N/A	Wrexham	Leasehold	Average	40
25a Chester Street	N/A	Wrexham	Leasehold	Good	41
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	55.5
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	55.5
13A Grosvenor Road	N/A	Wrexham	Leasehold	Average	58
61 Regent Street	N/A	Wrexham		Average	79
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	91
Grosvenor Road	N/A	Wrexham	Leasehold	Average	97
Suite C Grosvenor Lodge	N/A	Wrexham	Leasehold	Average	106
Suite 2, second floor, 22 Lord Street	N/A	Wrexham	Leasehold	Budget	135
17 Egerton Street	N/A	Wrexham	Leasehold	Average	147
Kelso Business Centre	N/A	Wrexham	Leasehold	Average	161
Suite 3, Second floor, 22 Lord Street	N/A	Wrexham	Leasehold	Budget	163
1st Floor, Trinity House	N/A	Wrexham	Leasehold	Average	167
8-10 Priory Street	N/A	Wrexham	Leasehold	Budget	177
Kelso House	N/A	Wrexham	Leasehold	Average	197
Units at Rosehill Business Centre	N/A	Erbistock	Leasehold	Good	228
King Street	N/A	Wrexham	Freehold	Average	242
Suite 2, Trinity House	N/A	Wrexham	Leasehold	Average	269
Ty Dewi Sant	N/A	Wrexham	Leasehold	Average	272
Rhosddu Road	N/A	Wrexham	Leasehold	Average	272
Suite 1, Trinity House	N/A	Wrexham	Leasehold	Average	465
New Foundry Buildings	N/A	Johnstown	Leasehold	Average	549
1-2 Imperial Buildings	N/A	Wrexham	Leasehold	Average	715
Ty Henblas, Henblas Street	N/A	Wrexham	Leasehold	Good	1,412
Roxburgh House	N/A	Wrexham	Leasehold	Average	1,486
Centenary Buildings	N/A	Wrexham	Leasehold	TBC	1,503
King Street	N/A	Wrexham	Leasehold	Average	1,503
Unit 6c, Elm House	Pandy Business Park	Wrexham	Leasehold	Average	62

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit 6e, Elm House	Pandy Business Park	Wrexham	Leasehold	Average	80
Unit 6f, Elm House	Pandy Business Park	Wrexham	Leasehold	Average	33
Unit 8, Elmwood	Pandy Business Park	Wrexham	Leasehold	Average	388
Unit 1A	Rossett Business Park	Rossett	Leasehold	Good	25
Unit 3A	Rossett Business Park	Rossett	Leasehold	Average	218
Suites 4a/4b	Rossett Business Village	Rossett	Leasehold	Average	146
Unit 1a Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	237
Unit 1c, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	129
Unit 2, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	567
Unit 3, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	209
Unit 4, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	209
Unit 6, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	209
Unit 7, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	488
Unit 15, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	488
Unit 16, Wilkinson Business Park	Wrexham Industrial Estate	Wrexham	Either	Average	567
Unit E, Bryn Business Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	152
Unit D, Bryn Business Centre	Wrexham Industrial Estate	Wrexham	Leasehold	Budget	114
Clwyd House, Blackwood Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	71
Millwood House	Wrexham Industrial Estate	Wrexham	Leasehold	Average	39
Suite 1, Unit 3, Blackwood Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	57
Suite 2, Unit 3, Blackwood Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	68
Suite 3, Unit 3, Blackwood Business Park	Wrexham Industrial Estate	Wrexham	Leasehold	Average	52
Suite 4, Unit 3, Blackwood	Wrexham	Wrexham	Leasehold	Budget	205

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Business Park	Industrial Estate				
Unit 4, Bridge Business Centre, Ash Rd South	Wrexham Industrial Estate	Wrexham	Freehold	Average	325
Unit 3a/unit 3b, Bridge Business Centre, Ash Rd South	Wrexham Industrial Estate	Wrexham	Freehold	Average	195
Building 2, Chesney Court	Wrexham Technology Park	Wrexham	Either	Average	483
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	69
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	704
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	124
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	124
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	124
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	124
Edison Court	Wrexham Technology Park	Wrexham	Leasehold	Average	124
Pembroke House / Kingsway House	Wrexham Technology Park	Wrexham	Leasehold	Average	465
St Andrews House	Wrexham Technology Park	Wrexham	Leasehold	Average	497

Source: BE Group, 2014

Appendix 3 – Flintshire Vacant Property Schedules

Table A3.1 – Schedule of Industrial Premises

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit 4, Prince William Avenue	Abraham Court	Sandycroft	Leasehold	Average	69
Unit B20	Ashmount Enterprise Park	Flint	Leasehold	Average	88
Unit A1	Ashmount Enterprise Park	Flint	Leasehold	Average	143
Unit A7	Ashmount Enterprise Park	Flint	Leasehold	Average	181
Unit B15	Ashmount Enterprise Park	Flint	Leasehold	Average	152
Unit B20	Ashmount Enterprise Park	Flint	Leasehold	Average	88
Unit C30/31	Ashmount Enterprise Park	Flint	Leasehold	Average	119
Unit D33	Ashmount Enterprise Park	Flint	Leasehold	Average	234
Unit E35	Ashmount Enterprise Park	Flint	Leasehold	Average	307
Unit F39	Ashmount Enterprise Park	Flint	Leasehold	Average	560
Unit 13, River Lane	Borders Industrial Park	Saltney	Leasehold / Freehold	Average	234
Unit 11 B, River Lane	Borders Industrial Park	Saltney	Leasehold / Freehold	Average	230
Unit 12, River Lane	Borders Industrial Park	Saltney	Leasehold / Freehold	Average	139
Unit 1	Broncoed Business Park	Mold	Leasehold	Average	898
Unit 22	Castle Park Industrial Estate	Flint	Freehold	Good Quality	3831
Unit 11, Marley Way	Central Trading Estate	Saltney	Leasehold	Average	441
Unit 12, Marley Way	Central Trading Estate	Saltney	Leasehold	Good Quality	434
Unit 14, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Good Quality	438
Unit 15, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Good Quality	437
Unit 17, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Good Quality	437
Unit 6, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Average	456

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit 8, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Average	439
Unit 9, Marley Way	Central Trading Estate	Saltney	Long Leasehold	Average	440
Unit 3 Central Trading Estate	Central Trading Estate	Saltney	Leasehold	Average	230
Unit 4 Central Trading Estate	Central Trading Estate	Saltney	Leasehold	Average	139
B10, Evans Business Centre	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	114
B11, Evans Business Centre	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	117
B13, Evans Business Centre	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	92
Expressway 55, Tenth Avenue, Zone 3, Deeside Industrial Park	Deeside Industrial Estate	Sealand	Leasehold / Freehold	Good Quality	10,060
Fourth Avenue, Zone 2, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Freehold	Good Quality	985
Parkway One, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Average	3966
Unit 2, Second Avenue, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Average	7598
Unit 32, Drive B, First Avenue, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Average	945
Unit 34, First Avenue, Deeside Industrial Estate East	Deeside Industrial Estate	Deeside	Leasehold / Freehold	Budget	8800
Unit 39, Drive B, First Avenue, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Average	946
Unit 43A, First Avenue, Deeside Industrial Park East, Zone 2	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	2012
Unit 47, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Average	1000
Unit 47A, First Avenue, Deeside Industrial Park East, Zone 2	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	743
Unit 50, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	910
Unit 54, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Average	314
Unit 7, Parkway Business Centre, Sixth Avenue, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Average	281

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Waters Edge Business Park, Zone 2, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold / Freehold	Under construction	2787
Unit 10 Parkway Business Centre	Deeside Industrial Estate	Deeside	Leasehold / Freehold	Average	276
Unit 8 Parkway Business Centre	Deeside Industrial Estate	Deeside	Leasehold	Average	278
Units 1 & 2 Parkway Business Centre	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	122
Unit 5 Deeside Point, Tenth Avenue, Zone 3	Deeside Industrial Estate	Deeside	Freehold	Good Quality	607
Unit 19, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	243
Unit 26, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	275
Unit 16, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	412
Unit 13, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	415
Unit 23, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	561
Unit 21, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	577
Unit 28, Zone 1 North	Deeside Industrial Estate	Deeside	Leasehold	Average	273
Unit 66, Zone 1 Central	Deeside Industrial Estate	Deeside	Leasehold	Average	313
Unit 12a, Zone 1 Central	Deeside Industrial Estate	Deeside	Leasehold	Average	18214
Unit 13b, Zone 1, Central	Deeside Industrial Estate	Deeside	Leasehold	Average	18513
Expressway 56, Fourth Avenue	Deeside Industrial Estate	Deeside	Leasehold	-	15061
Unit 1e, Tenth Avenue, Zone 3, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Average	868
Hangars, South Section, Zone 1	Deeside Industrial Estate	Deeside	Leasehold	Average	3052
Unit 18, Jaguar House, Drome Road, Zone 1 North, Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	113
Unit 19, Jaguar House, Drome Road, Zone 1. Deeside Industrial Park	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	113
Unit 2, Deeside Industrial Park East	Deeside Industrial Estate	Deeside	Leasehold	Average	1327

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit 4	Deva Business Park	Sealand	Leasehold	Good Quality	199
Unit 4A	Deva Business Park	Sealand	Leasehold	Good Quality	199
Unit 1, Globe Business Park, Globe Way	EM1(3) Mount Pleasant Road (north)	Buckley	Leasehold / Freehold	Good Quality	465
Unit 1a, Globe Business Park, Globe Way	EM1(3) Mount Pleasant Road (north)	Buckley	Leasehold / Freehold	Good Quality	465
Unit 2, Deeside Point, Deeside Industrial Park	EM1(9) Deeside Industrial Park, Phase II	Deeside	Leasehold	Average	1493
Unit C3, Tenth Avenue, Deeside Industrial Park, Zone 3	EM1(9) Deeside Industrial Park, Phase II	Deeside	Leasehold	Average	288
Unit 14	Engineer Park	Sandycroft	Leasehold	Good Quality	49
Unit 17	Engineer Park	Sandycroft	Leasehold	Average	136
Unit 33	Engineer Park	Sandycroft	Leasehold	Average	409
Unit B St Ives Way	Engineer Park	Sandycroft	Leasehold	Good Quality	232
Station Road, (Off Factory Road)	Engineer Park	Sandycroft	Leasehold	Average	260
Unit 8	Flint Trade Park	Flint	Leasehold	Budget	348
Unit C	Flint Trade Park	Flint	Leasehold	Average	204
Glendale Avenue	Glendale Point	Sandycroft	Leasehold	Budget	11835
Unit 5, Glendale Avenue	Glendale Point	Sandycroft	Leasehold / Freehold	Average	2966
Unit 1, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	299
Unit 2, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	676
Unit 3, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	495
Unit 4, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	168
Unit 5, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	81
Unit 6, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	44
Unit 7, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	85
Unit 8, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	807
Unit 9, Greenfield Road	Greenfield Industrial Park	Holywell	Leasehold	Budget	420

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit A	Gwernaffield Business Park	Mold	Leasehold	Average	1021
Plot 318, Clwyd Close	Hawarden Industrial Park	Hawarden	Freehold	Average	192
Unit 8	Holland Park	Sandycroft	Leasehold	Good Quality	185
Unit 9	Holland Park	Sandycroft	Leasehold	Average	278
Unit 2d	Interlinq Trade Park	Queensferry	Leasehold	Average	603
Unit 2b	Interlinq Trade Park	Queensferry	Leasehold	Good Quality	244
Unit 28	Manor Industrial Estate	Flint	Leasehold	Average	139
Unit 33	Manor Industrial Estate	Flint	Leasehold	Average	139
Unit 35	Manor Industrial Estate	Flint	Leasehold	Average	139
Unit 10	Manor Industrial Estate	Flint	Leasehold	Average	278
Little Mountain, Drury New Road	N/A	Buckley	Leasehold	Average	4236
The Old School, Higher Kinnerton	N/A	Higher Kinnerton	Leasehold	Average	315
Factory Road	N/A	Sandycroft	Freehold	Good Quality	2418
Site 1 Factory Road	N/A	Sandycroft	Freehold	Budget	3035
Site 2 Factory Road	N/A	Sandycroft	Freehold	Budget	4047
The Terminal Building, Aviation Park, Saltney Ferry Road	N/A	Chester	Leasehold	Average	253
Unit 1e/2e, Chester Road	Pentre Industrial Estate	Queensferry	Leasehold	Average	837
Unit 4, Deeside Lane	Sealand Nursery	Sealand	Leasehold	Budget	437
Unit 5, Deeside Lane	Sealand Nursery	Sealand	Leasehold	Budget	945
Unit 7, Deeside Lane	Sealand Nursery	Sealand	Leasehold	Budget	944

Source: BE Group, 2014

Table A3.2 – Schedule of Office Premises

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Unit B2, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	115
Unit B8, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	97
Unit C2, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	51
Unit D1, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	69
Unit D2, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	36
Unit D5, Evans Business Centre,	Deeside Industrial Estate	Deeside	Leasehold	Good Quality	32
Suite 1, Aled House	Lakeside Business Vallage	Ewloe	Leasehold	Average	295
Unit 1, Acorn Business Park	Aber Park Industrial Estate	Flint	Leasehold	Average	379
Unit 5, Acorn Business Park,	Aber Park Industrial Estate	Flint	Leasehold	Average	379
Unit 8, Acorn Business Park	Aber Park Industrial Estate	Flint	Leasehold	Average	185
Enterprise House Business Centre	Aber Park Industrial Estate	Flint	Leasehold	Good	46
Unit 19, Wrexham Road	Mold Business Park	Mold	Leasehold/ Freehold	Average	480
Ground Floor, Unit 16	Mold Business Park	Mold	Leasehold/ Freehold	Average	79
1st Floor Front, Unit 16,	Mold Business Park	Mold	Leasehold/ Freehold	Average	82
1st Floor Rear, Unit 16,	Mold Business Park	Mold	Leasehold/ Freehold	Average	40
Unit 25	Mold Business Park	Mold	Leasehold	Average	171
Broncoed House	Broncoed Business Park	Mold	Leasehold	Average	88
Suite 1, Project House	Glendale Business Park	Sandycroft	Leasehold	Average	34
Suite 3, Project House	Glendale Business Park	Sandycroft	Leasehold	Average	34
Suite 4, Project House	Glendale Business Park	Sandycroft	Leasehold	Average	25
Viscount House, River Lane	N/A	Saltney	Leasehold	Average	139
Border Distribution Centre, River Lane	N/A	Saltney	Leasehold	Average	127

Property	Employment Site/Area	Settlement	Tenure	Quality	Size, Sqm
Old Marsh Farm. Welsh Road	N/A	Sealand	Freehold	Average	83
Territorial House, High Street	N/A	Connah's Quay	Leasehold	Budget	557

Source: BE Group, 2014

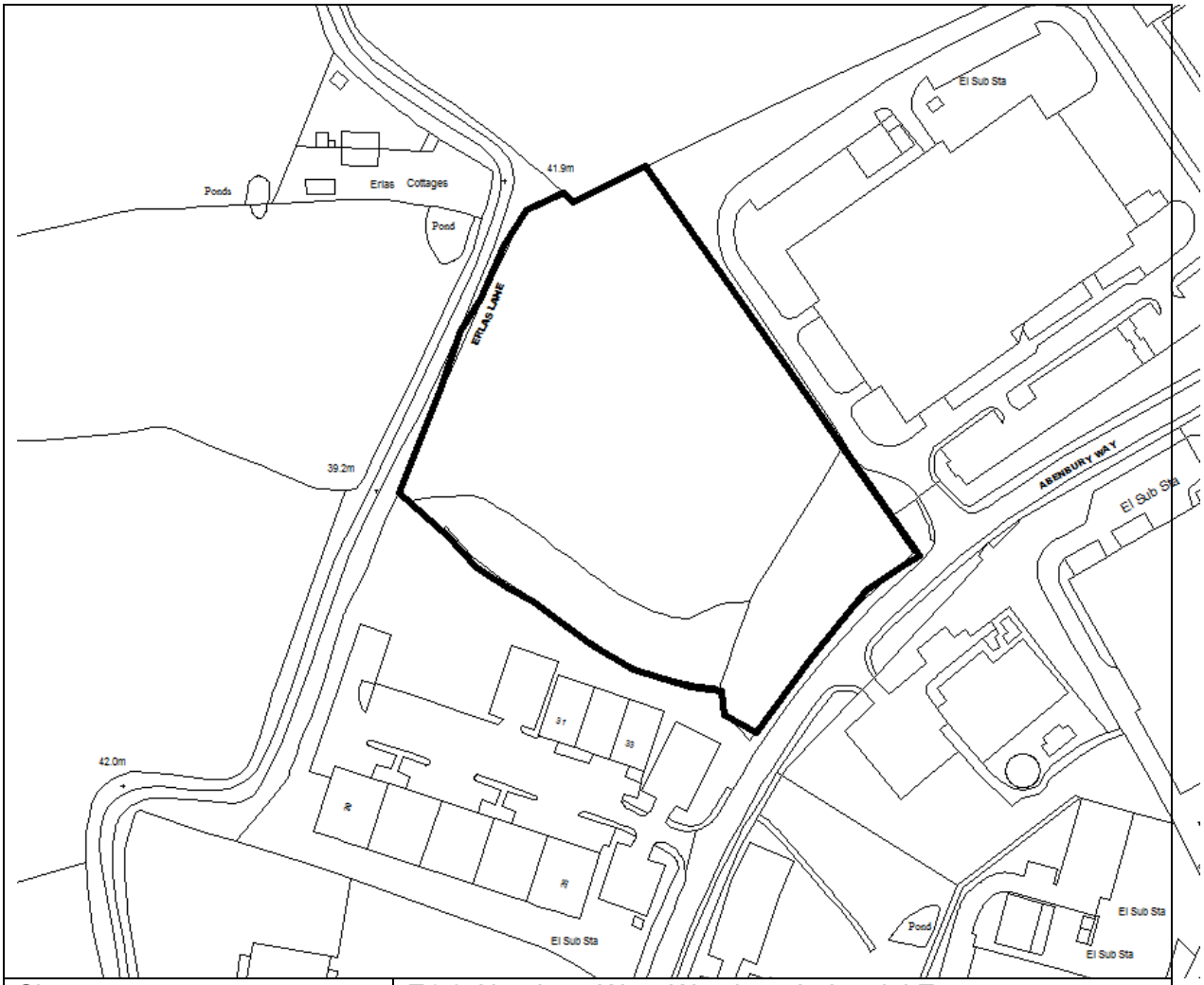
APPENDIX 4 – WREXHAM SITE PROFORMAS

The employment land site proformas relate to undeveloped land (or a significant redevelopment opportunity) which are allocated for employment in the Unitary Development Plan (primarily under Policy E1), comprise developable land within Employment Areas or have existing/recently lapsed planning consents for B1/B2/B8 uses. These proformas are linked to the analysis in Section 6.0 of the main Joint Employment Land Review document.

The employment land site proformas are different to the Employment Area Assessments included at Appendix 10, in that the latter refers to existing development and buildings. However, it should be noted that an employment site can be included within an Employment Area, for example some 24 of the employment sites discussed below are within, or adjacent to, Wrexham Industrial Estate.

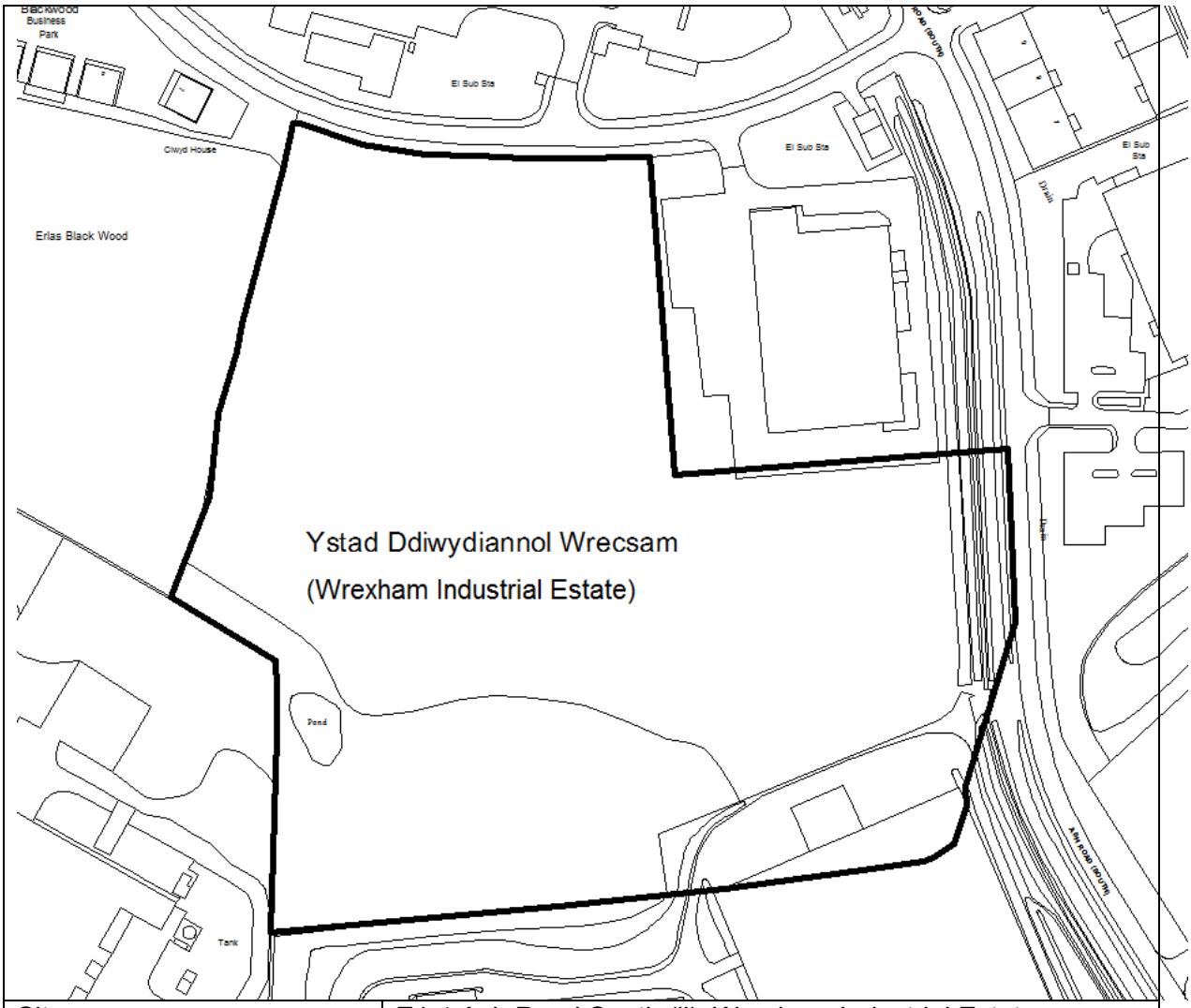
In terms of planning permissions for each site, the base date is April 2014.

Wrexham Industrial Estate – Sites Allocated under UDP Policy E1



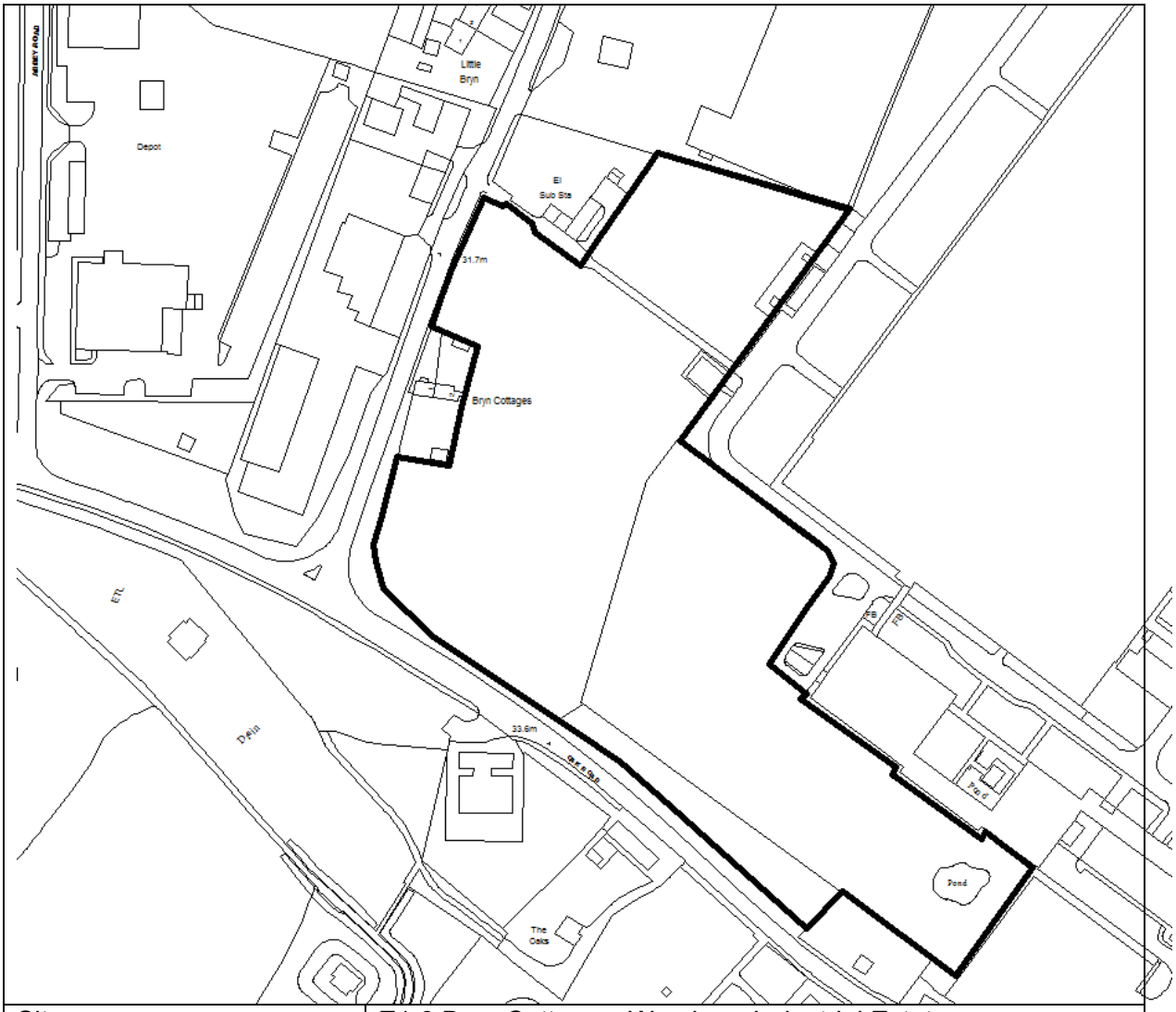
Site	E1.2 Abenbury Way, Wrexham Industrial Estate
Owner	Welsh Government
Agent	TACP Architects/Legat Owen
Size, ha	1.70
Market Availability	On the market
Planning Status	UDP Employment Allocation (Ref. 2)
Proposal	Owner currently seeking outline planning permission (Ref. P/2014/0195) for a 4,650 sqm B2 industrial unit, service yard, access and car park on 1.20 ha of land. Land to the north and west will be retained for ecological mitigation including ponds, grassland, trees, stream and Great Crested Newt Underpass.
Constraints	Various ecological issues including ponds (with Great Crested Newt Habitats), grassland habitats, bats, reptiles, birds and badgers Trees onsite Watercourses cross the edge of the site
Comments	Likely that unit will be used for the expansion of a local business (Cytec) However, continues to be marketed through Legat Owen, for

	sale, as a development site. Quoting price is £120,000/ha
Planning Issues	Green Barrier to the north (Policy EC1)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupiers
Serviced	No
Availability, years	0-1



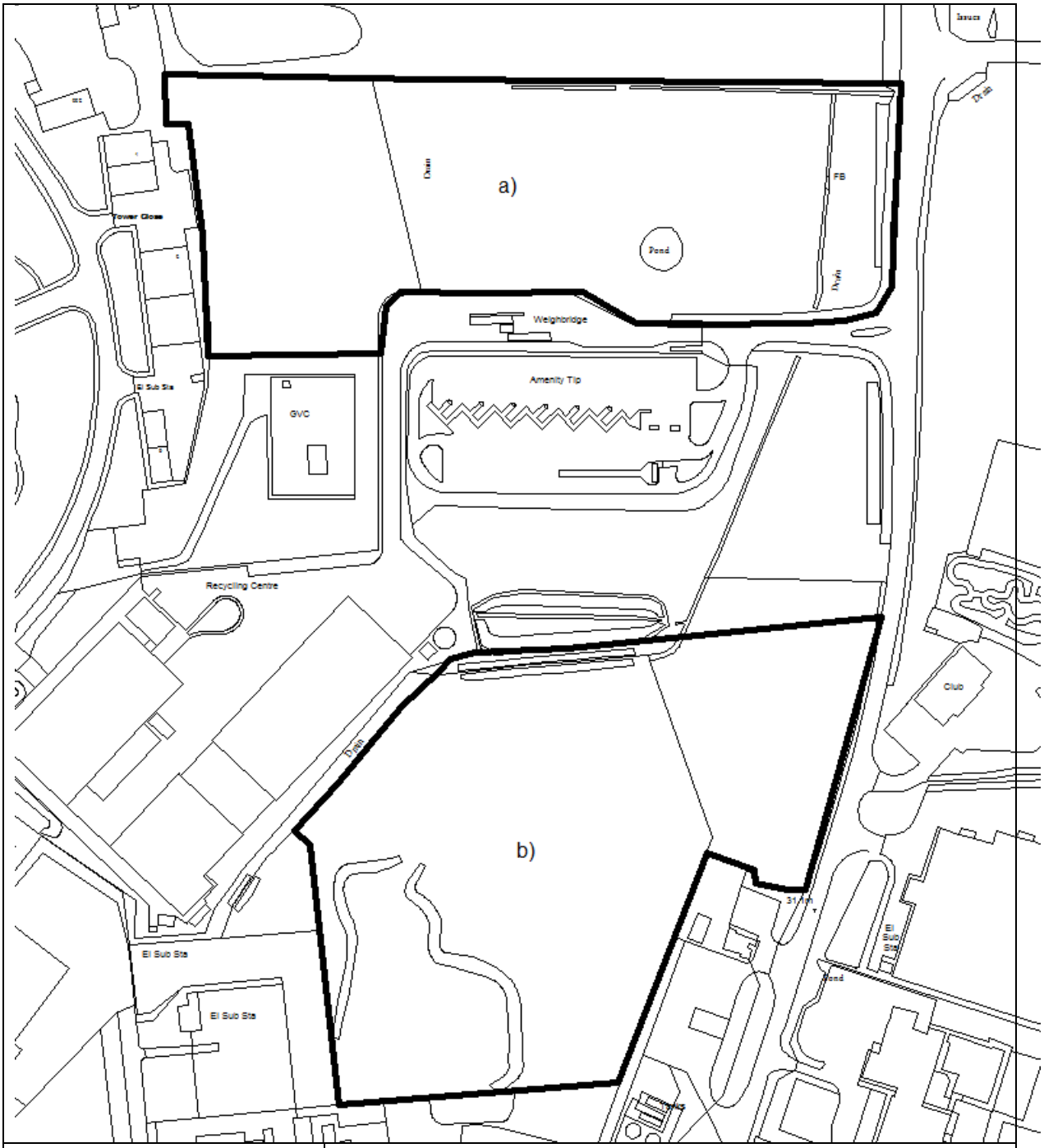
Site	E1.4 Ash Road South (ii), Wrexham Industrial Estate
Owner	Village Bakery Group
Agent	-
Size, ha	7.30
Market Availability	Not Available (Now Held as Expansion Land)
Planning Status	UDP Employment Allocation (Ref. 4)
Proposal	Recently acquired by The Village Bakery Group for further expansion within Wrexham Industrial Estate.
Constraints	Ponds on site (with Great Crested Newt Habitats). Up to half of the site may be required as ecological mitigation for the Newts, reducing the net developable area to 3.65 ha Woodland in the south (forms part of a wider Ancient Woodland area) Wildlife site to the west (Erlas Black Wood) which overlaps around Ash Road South Badgers reported onsite Habitat Directive constraints may make development here difficult Survey work underway here (and on other relevant sites in Wrexham Industrial Estate) with NRW funding to establish the full extent of the ecological constraints here

Comments	The site could accommodate a building of some 18,600 sqm.
Planning Issues	East of the site is in a floodrisk area (Policy EC12)
Likely development potential	Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



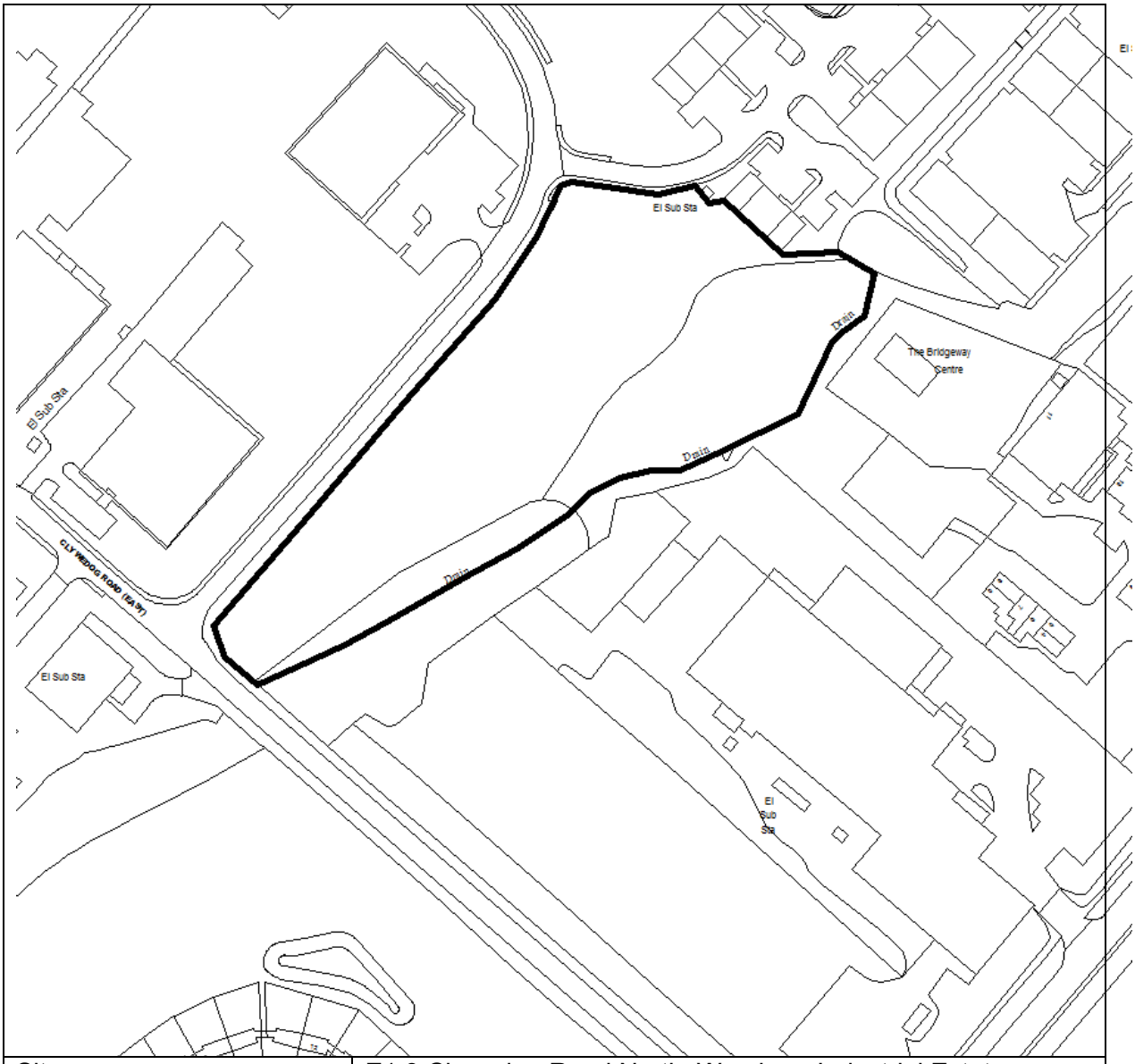
Site	E1.6 Bryn Cottages, Wrexham Industrial Estate
Owner	Multiple Owners (primarily Prysmian Cables and Systems)
Agent	-
Size, ha	3.60
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref 6)
Proposal	Previous planning application for a petrol station but no recent proposals put forward.
Constraints	Trees onsite Irregular 'L-shaped' site Housing adjacent Grizzled Skipper Butterfly recorded on site
Comments	No enquiries recorded by the Council for this site Suggested by Council ecologists as a possible ecological refuge/mitigation site
Planning Issues	-
Likely development potential	Industrial

Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	No
Availability, years	5+



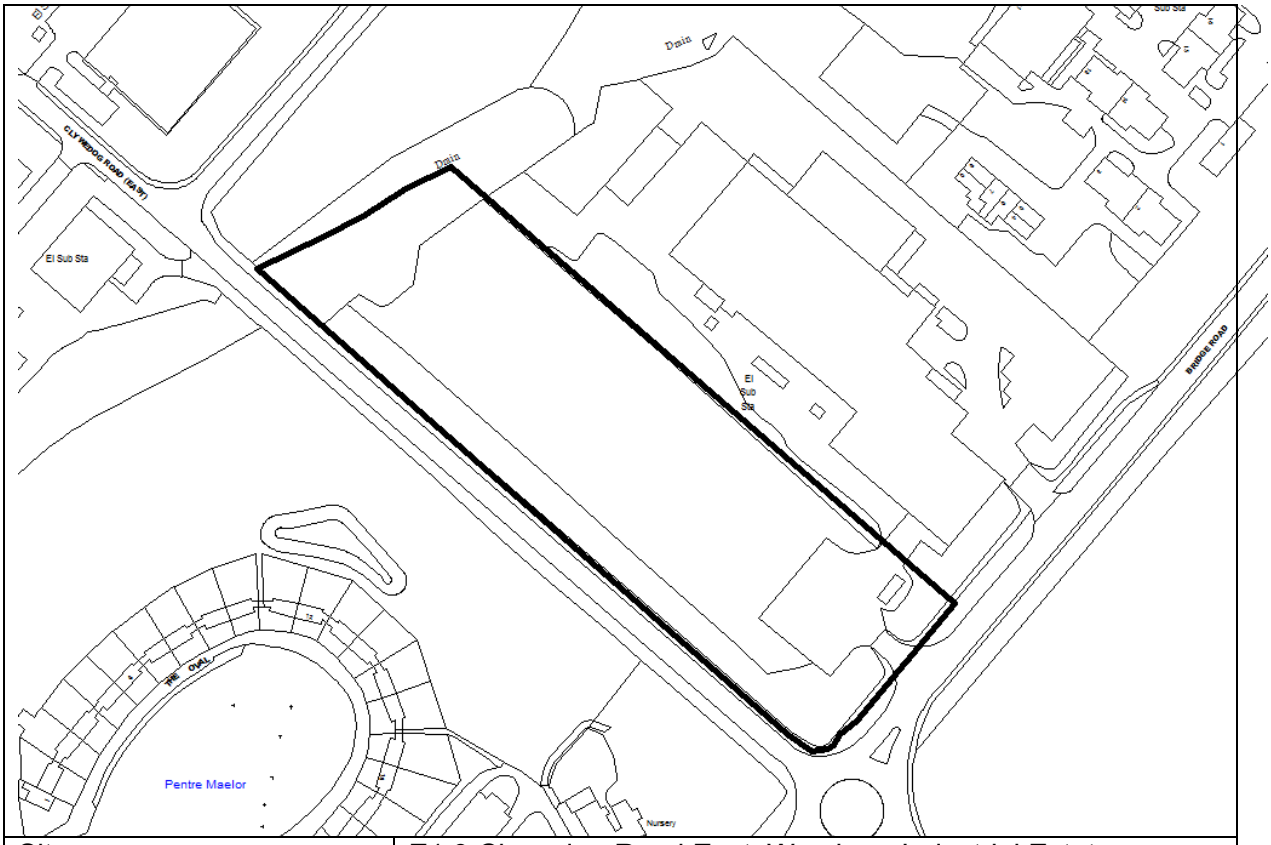
Site	E1.7 Bryn Road, Wrexham Industrial Estate
Owner	Wrexham County Borough Council
Agent	Axis PED
Size, ha	3.65 (Originally 9.5, 3.25 developed and 2.6 set aside for ecological mitigation)
Market Availability	Not Available (Developed)
Planning Status	UDP Employment Allocation (Ref. 7) Full planning permission (Ref. P/2007/0694) for a biological treatment facility for Waste Recycling Group far northern part of site - completed, with 2.6ha set aside for ecological

	mitigation a). Full planning permission for a biological treatment facility by Waste Recycling Group for southern part of site with 1.10ha of land set aside for ecological mitigation including ponds b) Development not complete at April 2014 base date.
Proposal	Full planning permission for a biological treatment facility for Waste Recycling Group on 3.65 ha of land in the southern part of the site (b), with 1.10 ha of land within this area set aside for ecological mitigation, including ponds The northern site (a) – 2.60 ha is set aside for ecological mitigation area as part of the waste recycling development which lies immediately adjacent in the south.
Constraints	N/A – Site developed
Comments	-
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	Yes
Availability, years	0-1



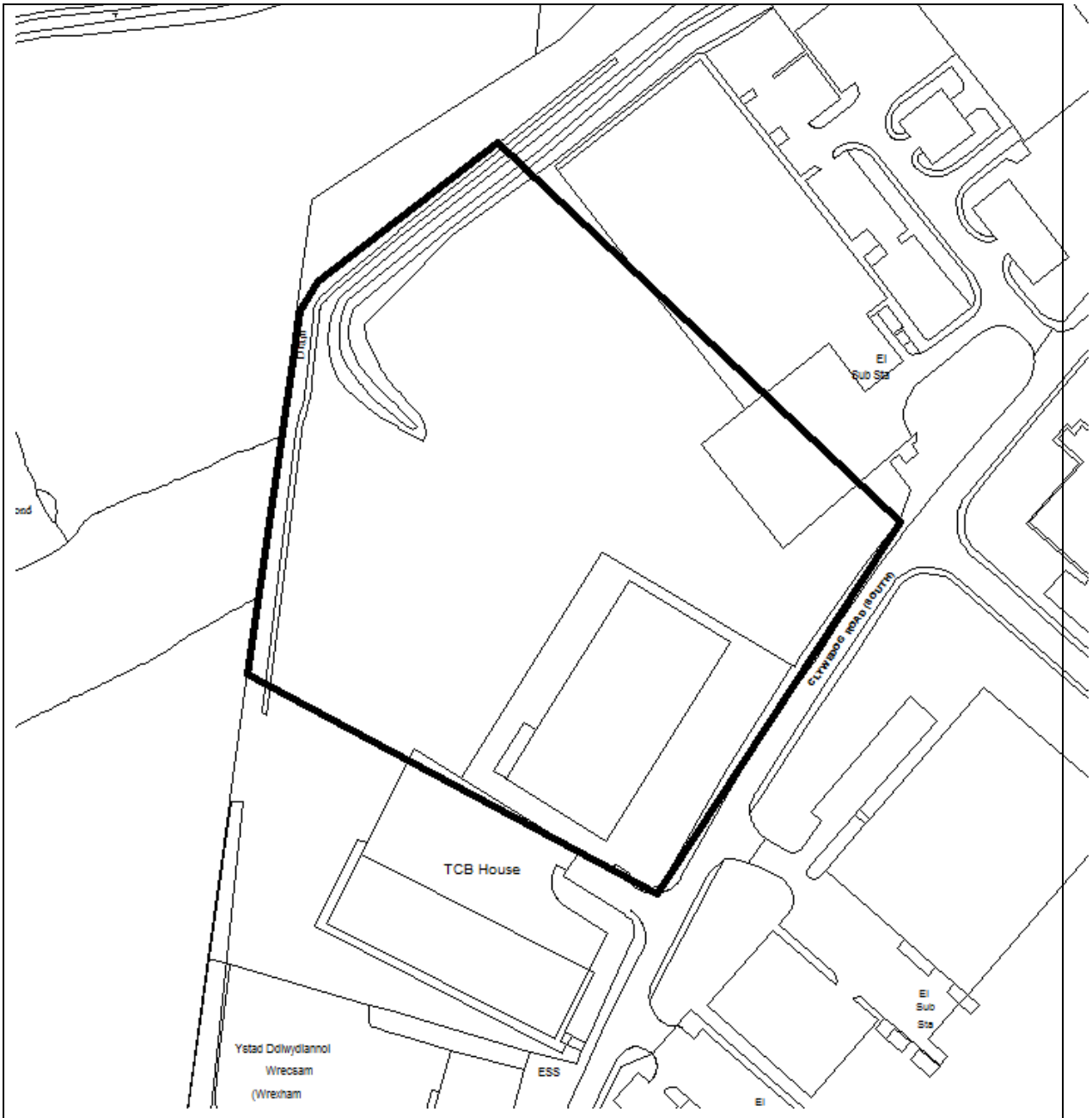
Site	E1.8 Clywedog Road North, Wrexham Industrial Estate
Owner	First Investments
Agent	-
Size, ha	1.90
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	UDP Employment Land Allocation (Ref. 8)
Proposal	-
Constraints	Ecological issues – Part broadleaved ancient woodland. Is in key ecological network location Not possible to develop woodland area, which would make remainder of site difficult to develop In floodrisk area Watercourses cross the site
Comments	Owner has aspirations to develop this land for services along with the neighbouring site (Site 9)
Planning Issues	-

Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Incubator/SME Cluster Site Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	No
Availability, years	5+



Site	E1.9 Clywedog Road East, Wrexham Industrial Estate
Owner	Hydro Aluminium
Agent	-
Size, ha	2.20
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. 9)
Proposal	-
Constraints	Frontage screened by trees Bridge Road frontage in use for HGV parking by Hydro Aluminium Identified by Council Ecologists as an ideal site to form part of the Wrexham Industrial Estate wildlife network. If this option was realised, around 40 percent of the site could be retained for ecological mitigation, reducing the net developable area to 1.32 ha.
Comments	First Investments have approached Hydro Aluminium about the purchase of this site First Investments has aspirations to develop this land for services along with the neighbouring site (Site 8)
Planning Issues	-
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Incubator/SME Cluster Site

	Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	No
Availability, years	1-3

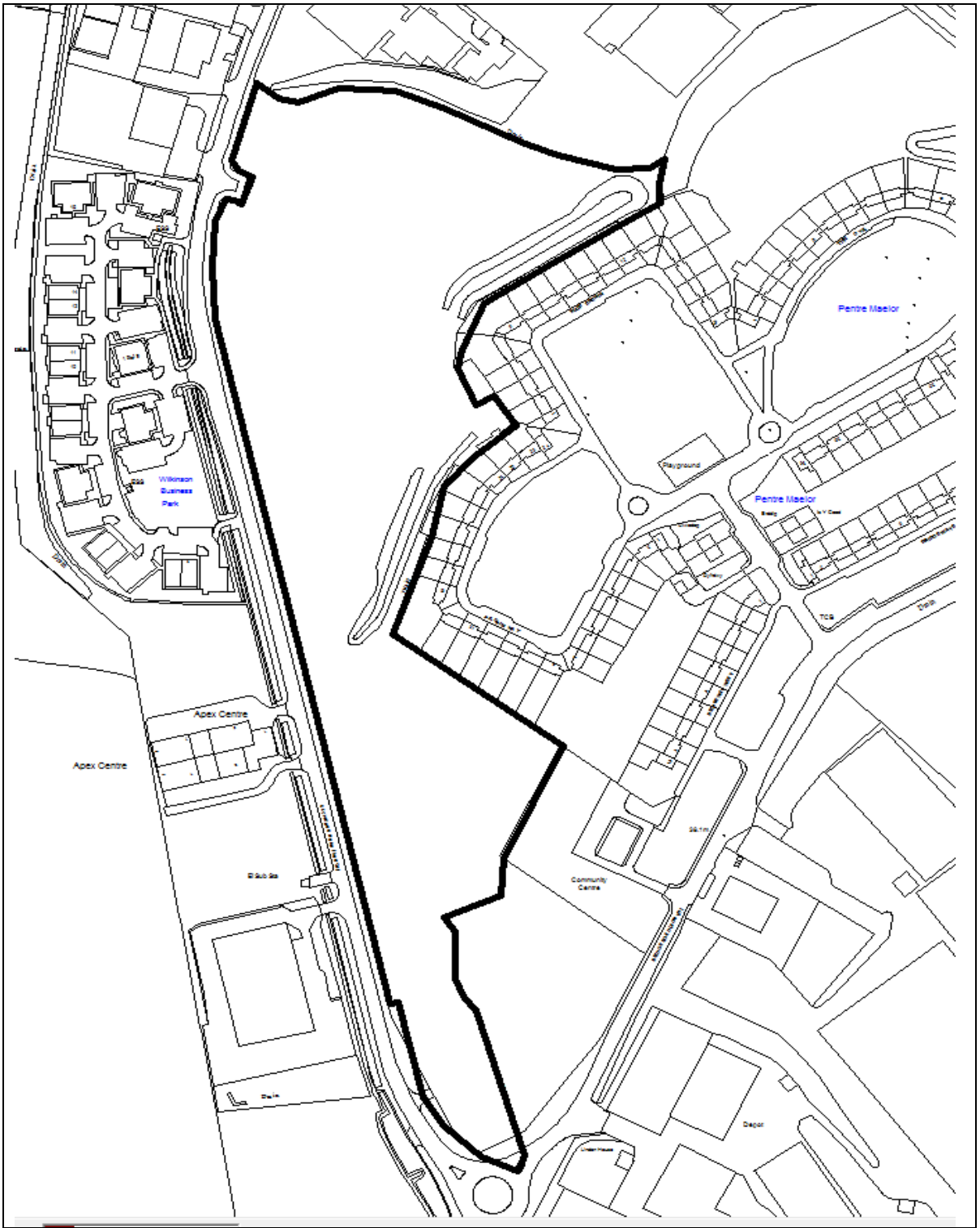


Site	E1.10 Clywedog Road South (i), Wrexham Industrial Estate
Owner	Tension Control Bolts/Penina 251
Agent	C4 Consulting
Size, ha	1.21 (Originally 3.3 ha of which 2.09 ha is developed)
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. 10) Southern section has permission for two industrial units (P/2011/0131 and P/2012/0771) by Tension Control Bolts. Land immediately adjoining to the south originally formed part of this allocation but has been developed out (p/2005/0552)
Proposal	Planning permission for 2 industrial units (Ref. P2008/0329)

	by Penina 251 on the northern part of the site (1.21 ha) has now lapsed. Southern section has permission for two industrial units of 1,952 sqm and 3,800 sqm by Tension Control Bolts, on 1.43 ha, with land in the west to be retained for ecological mitigation, including provision of a pond. This was developed out at the April 2014 base date.
Constraints	Ecological issues mitigated through Tension Control Bolts scheme.
Comments	Southern section now developed and occupied, at least in part, by Tension Control Bolts.
Planning Issues	Green Barrier to the west (Policy EC1)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	Yes (in part)
Availability, years	1-3

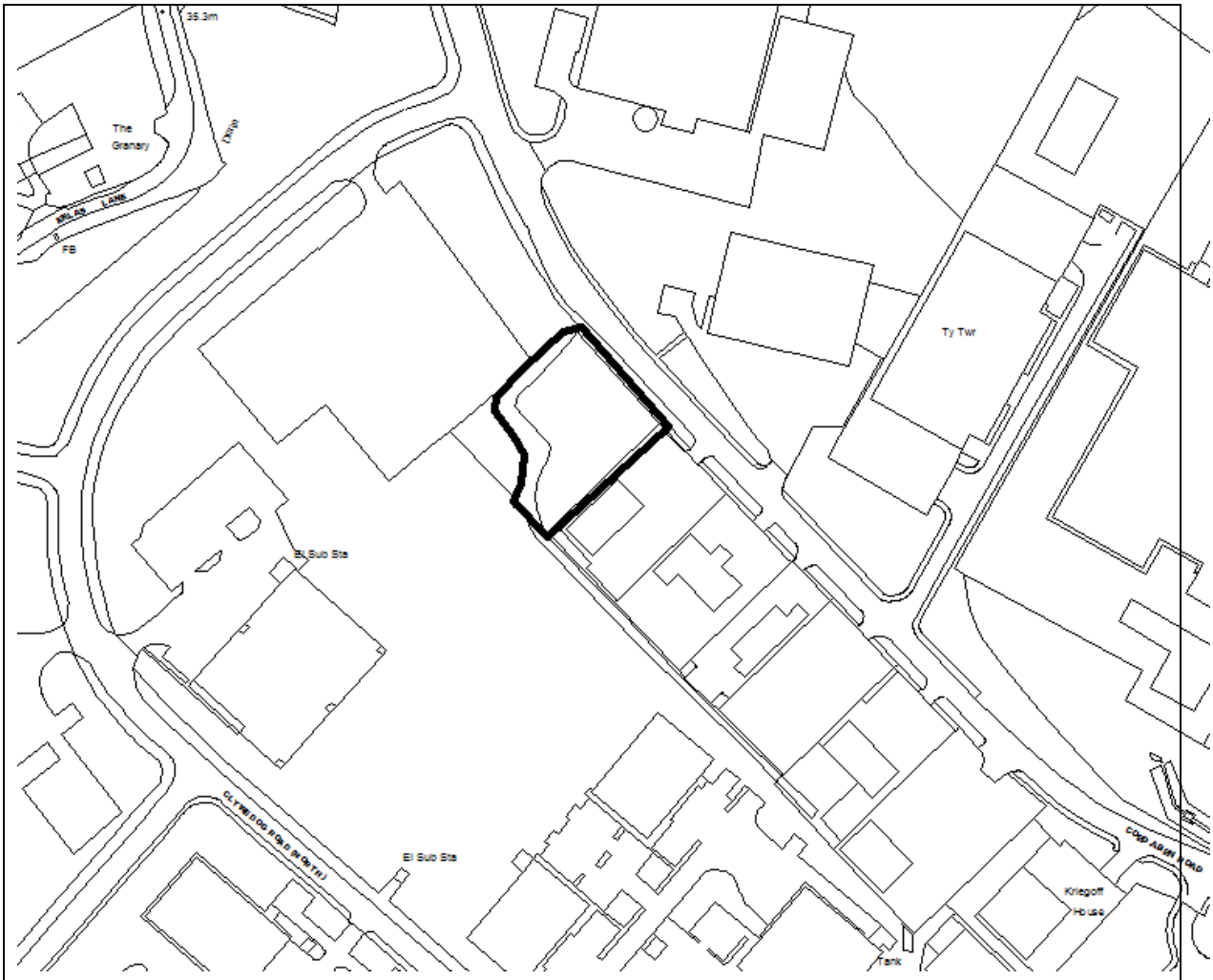
Site	E1.11 Clywedog Road South (ii), Wrexham Industrial Estate
Owner	Northern site (Site (a)):Lock Stock Self Storage Central site (Site (b)): Lloyd and Jones Engineering Ltd Southern site (Site (c)): First Investments
Agent	Platt White Partnership
Size, ha	a) 0.48 b) 0.48 c) 1 =1.96 (5 ha originally, 3.04ha developed).
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. 11)

	b) Outline planning permission for five units (Ref. P/2009/0120) by Lloyd and Jones Engineering Ltd. Extension of time to submit reserved matters (Ref. P/2014/0138) granted in May 2014 c) Originally formed part of the WIE link road application. Link road now built and this section is no longer required.
Proposal	a) Full planning permission for storage containers (Ref. P/2008/0999) by Lock Stock Self Storage has lapsed b) Outline planning permission for five units (Ref. P/2009/0120) by Lloyd and Jones Engineering Ltd. Extension of time to submit reserved matters, to 2019, (Ref. P/2014/0138) granted in May 2014
Constraints	Trees on sites Watercourse passes along eastern edge of all three sites (to be retained as ecological mitigation)
Comments	-
Planning Issues	Green Barrier to the west (Policy EC1)
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Locations General Business/Industrial Areas Incubator/SME Cluster Sites Site for Specific Occupiers
Serviced	No
Availability, years	3-5



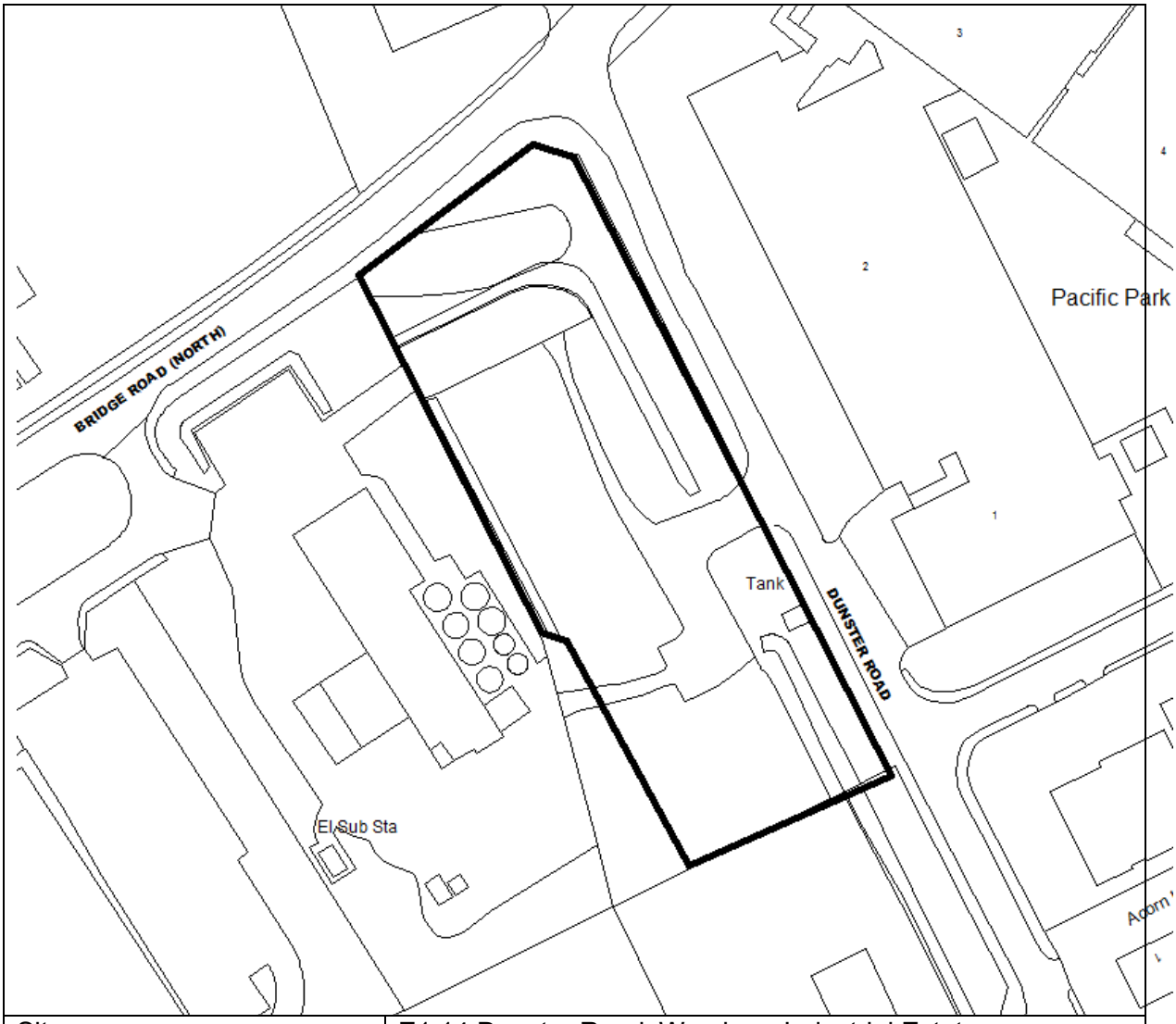
Site	E1.12 Clywedog Road South (iii), Wrexham Industrial Estate
Owner	First Investments
Agent	-
Size, ha	6.50
Market Availability	Not Available (Owner has aspirations for development)

Planning Status	UDP Employment Allocation (Ref. 12)
Proposal	-
Constraints	Irregular, linear shape Residential buffer zone would also provide ecological mitigation
Comments	Owner has aspirations for a development of light industrial units here, reflecting current demand patterns Any proposal would include an ecological management plan
Planning Issues	Protected for B1 business uses B1 due to proximity to housing (Policy E8). Links to Pentre Maelor Buffer Zone (Policy EC17)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Areas Incubator/SME Cluster Sites Site for Specific Occupiers
Serviced	No
Availability, years	1-3



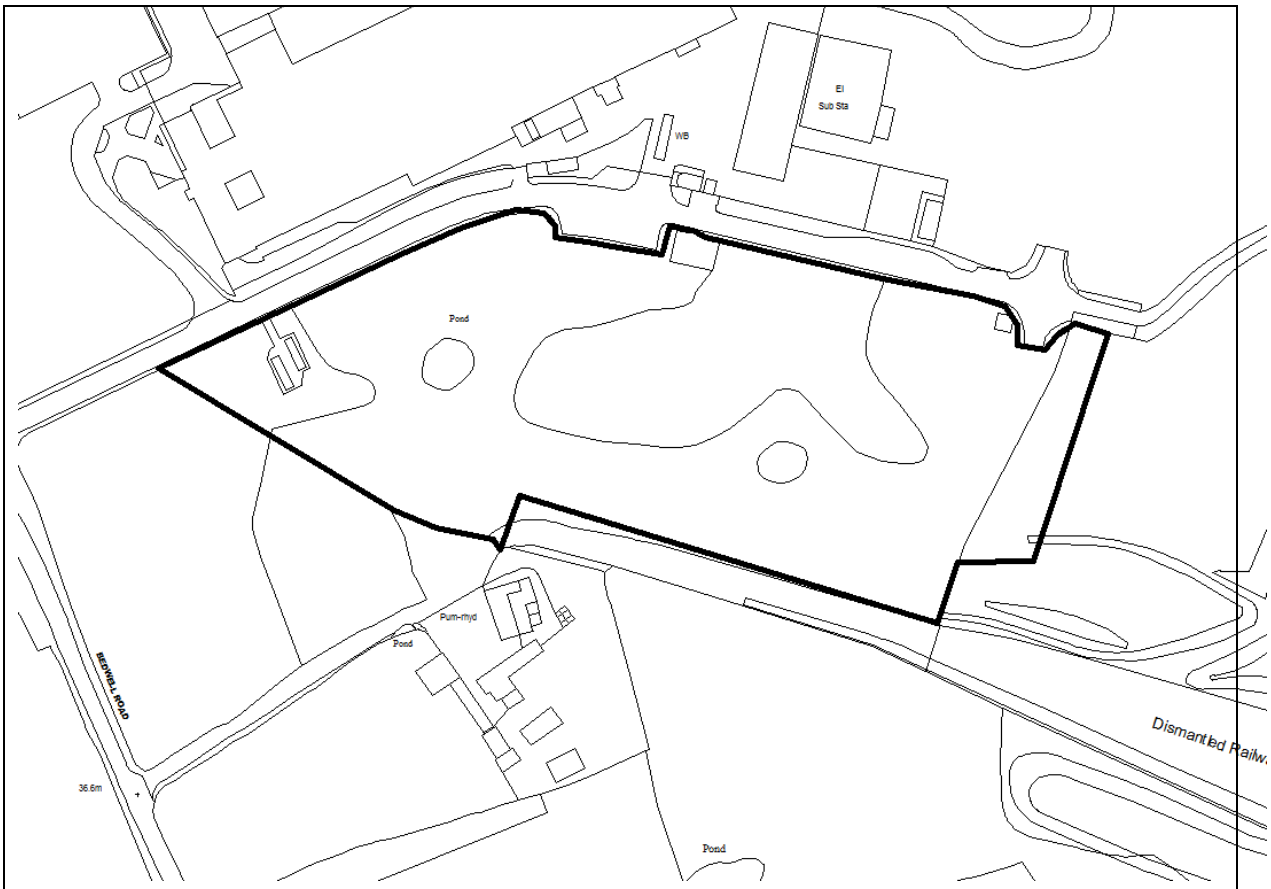
Site	E1.13 Coed Aben Road, Wrexham Industrial Estate
Owner	First Investments
Agent	Lambert Smith Hampton
Size, ha	0.17 (2.6ha originally, 2.43ha developed)
Market Availability	On the Market
Planning Status	UDP Employment Allocation (Ref. 13) Land immediately adjoining to the south east originally formed part of the allocation but has been developed.
Proposal	-
Constraints	Trees onsite
Comments	Marketed as a design and build opportunity, capable of providing a unit of 929 sqm or more. Previous application (Ref. P/2013/0810) for the erection of 627 sqm industrial unit, by First Investments, was withdrawn.
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Areas Incubator/SME Cluster Sites Site for Specific Occupiers

Serviced	No
Availability, years	1-3



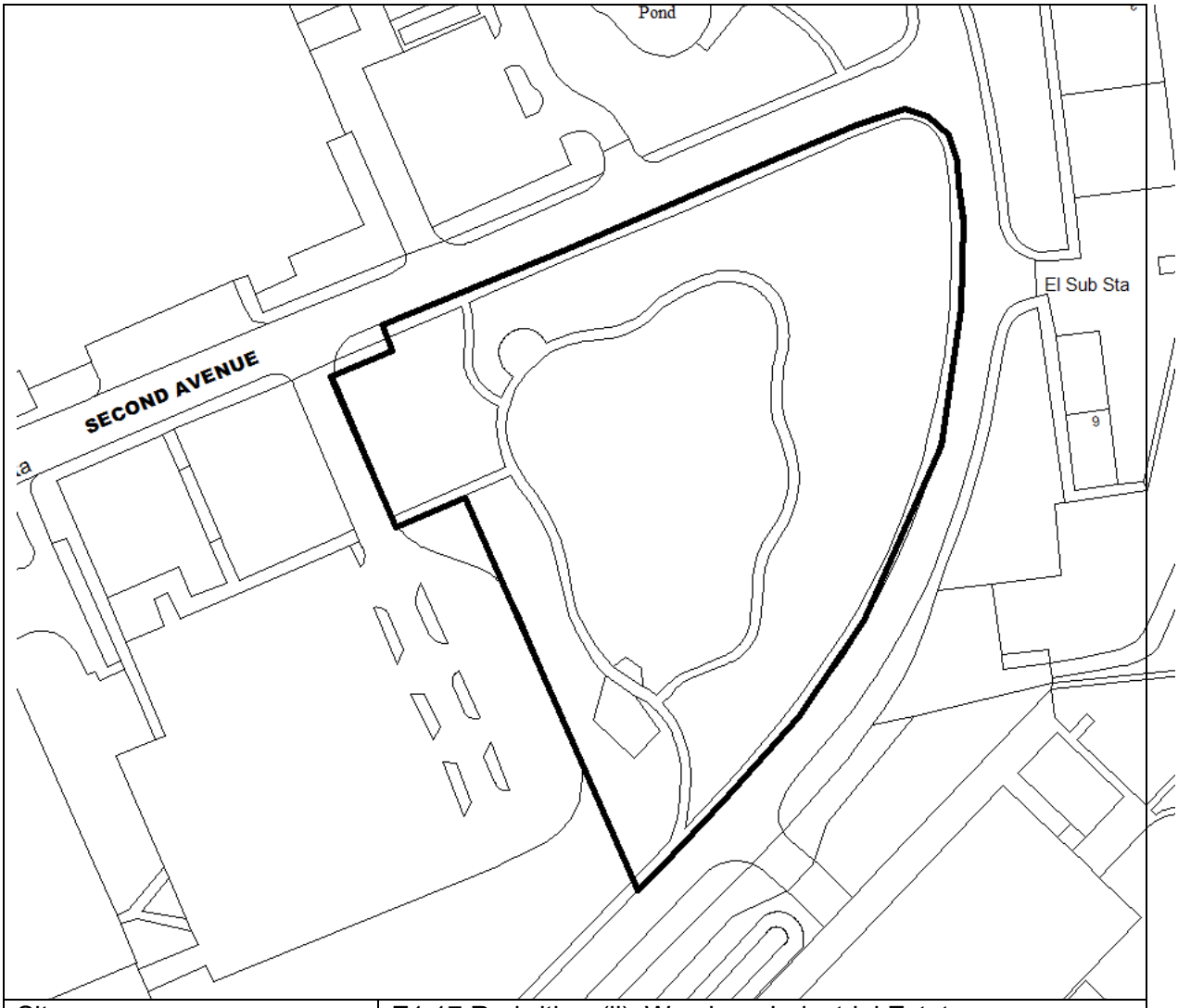
Site	E1.14 Dunster Road, Wrexham Industrial Estate
Owner	Lloyds Animal Foods Western
Agent	Kerry James Planning
Size, ha	0.80 (1.5ha originally, 0.6 ha developed)
Market Availability	Not Available (Part in use/part possibly undevelopable)
Planning Status	UDP Employment Allocation (Ref. 14) Full planning permission (App. Ref. P/2012/0204) for a biomass gasification CHP plant. Area immediately adjoining southern boundary originally formed part of the allocation but has been developed.
Proposal	Full planning permission (App. Ref. P/2012/0204) for a biomass gasification CHP plant on 0.22 ha of land in the south of the site.
Constraints	Land in the north of the site may be undevelopable due to ecological constraints
Comments	CHP plant not started yet Land in the north also partly in use as parking for Lloyds Animal Foods and will generally be held to meet the

	expansion needs of this company only.
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	3-5



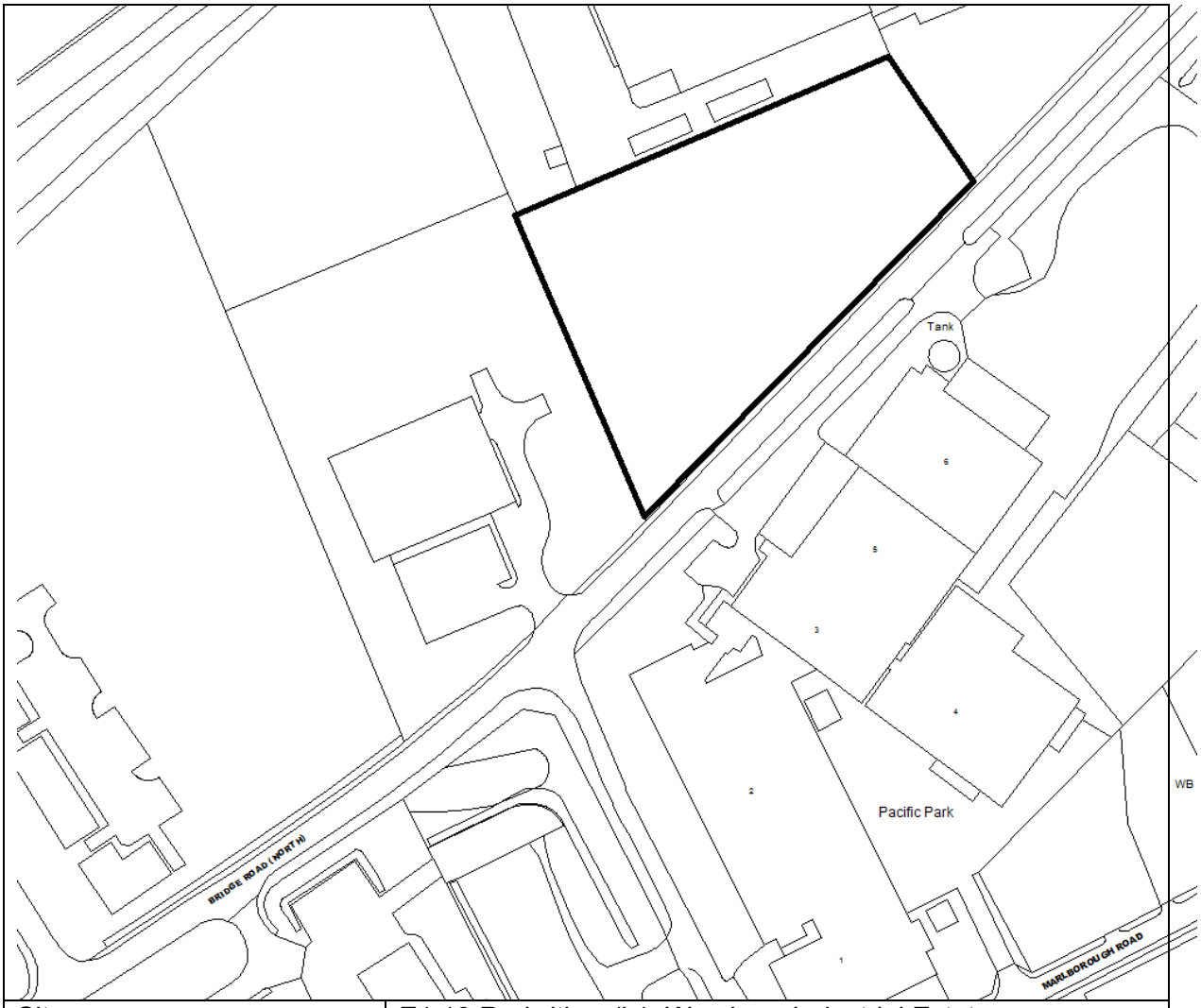
Site	E1.15 Former Tetra Pak, Wrexham Industrial Estate
Owner	Mainetti
Agent	-
Size, ha	2.90
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 15)
Proposal	-
Constraints	Trees onsite Various footpaths cross the site Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this land retained as an ecological mitigation site
Comments	Mainetti are seeking to dispose of this site Mainetti and the Council have so far received four (confidential) enquiries for this land
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No

Availability, years	5+



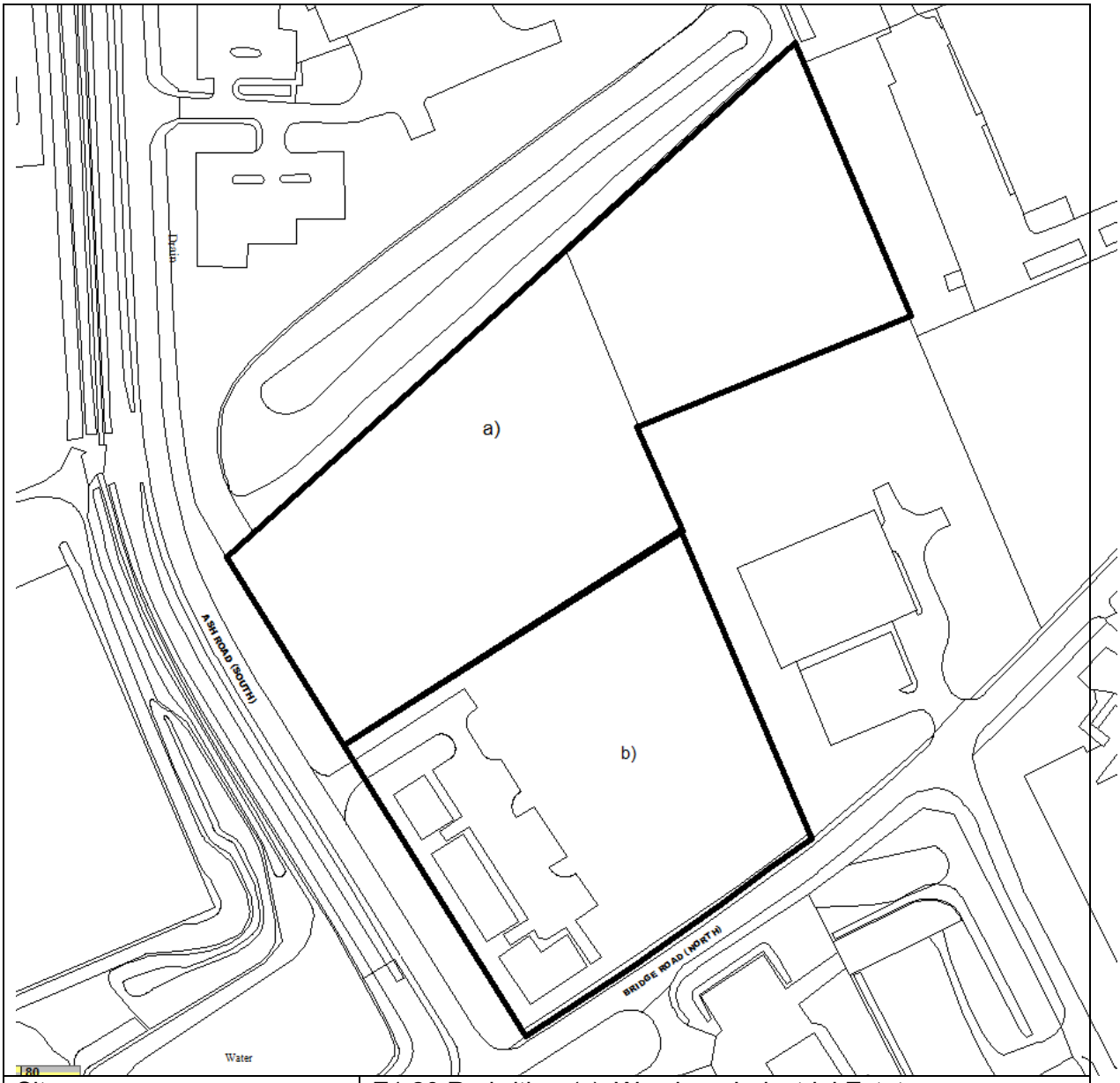
Site	E1.17 Redwither (ii), Wrexham Industrial Estate
Owner	Isringhausen
Agent	-
Size, ha	0.90
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 17)
Proposal	-
Constraints	Trees onsite Footpaths cross the site
Comments	Could be linked to Site 19 via a strip of undeveloped land along the Bridge Road North frontage Isringhausen seeking to dispose of this site and Site 19 Interest from Proserve Industrial Limited
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Incubator/SME Cluster Site

	Site for Specific Occupiers
Serviced	No
Availability, years	1-3



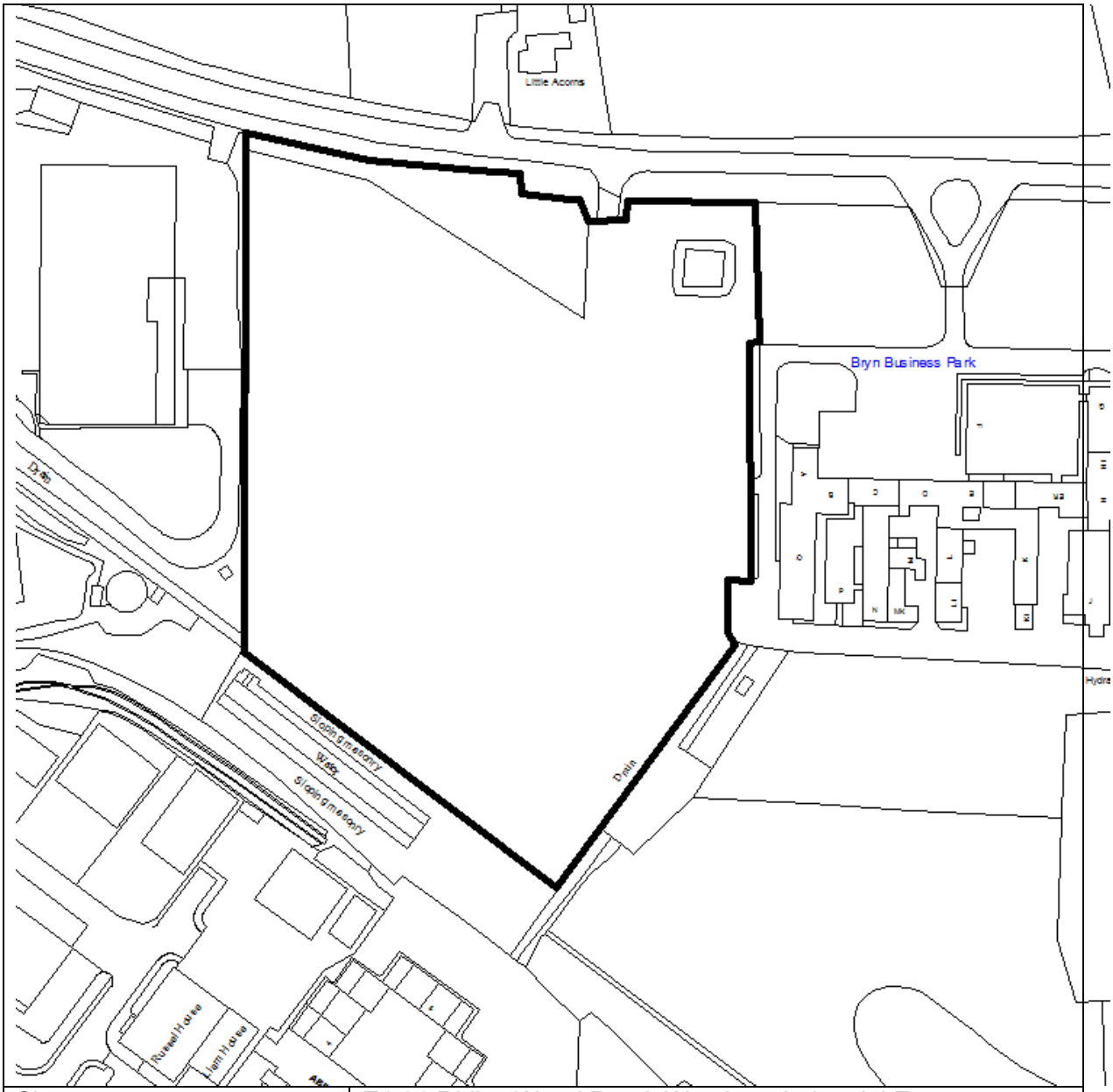
Site	E1.19 Redwither (iv), Wrexham Industrial Estate
Owner	Isringhausen
Agent	-
Size, ha	0.90
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 19)
Proposal	-
Constraints	Trees onsite Includes semi improved grassland. Potentially up to half the land (0.45 ha) could be set aside as a wildlife corridor.
Comments	Could be linked to Site 17 via a strip of undeveloped land along the Bridge Road North frontage Isringhausen seeking to dispose of this site and Site 17 Interest from R. C. Motors for land here. Negotiations underway for the sale of 0.8 ha.
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market	Established/Potential Office Location

segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



Site	E1.20 Redwither (v), Wrexham Industrial Estate
Owner	Northern Site (Site (a)): European Sheeting Southern Site (Site (b)): Erlas Developments
Agent	Alun Jones Associates
Size, ha	a) 2.03 b) 0.82 Total 2.85 ha (3.3ha originally, 0.45ha developed)
Market Availability	Not Available (southern part under development)
Planning Status	UDP Employment Allocation (Ref. 20)b) Full planning permission for 12 office units (P/2007/0433 & P/2008/1034) by Erlas Developments.
Proposal	b) Full planning permission for 12 B1 office units totalling 430 sqm (30-50 sqm each), plus pond and wet grassland to the east
Constraints	a) Bounded by Great Crested Newt exclusion fencing,

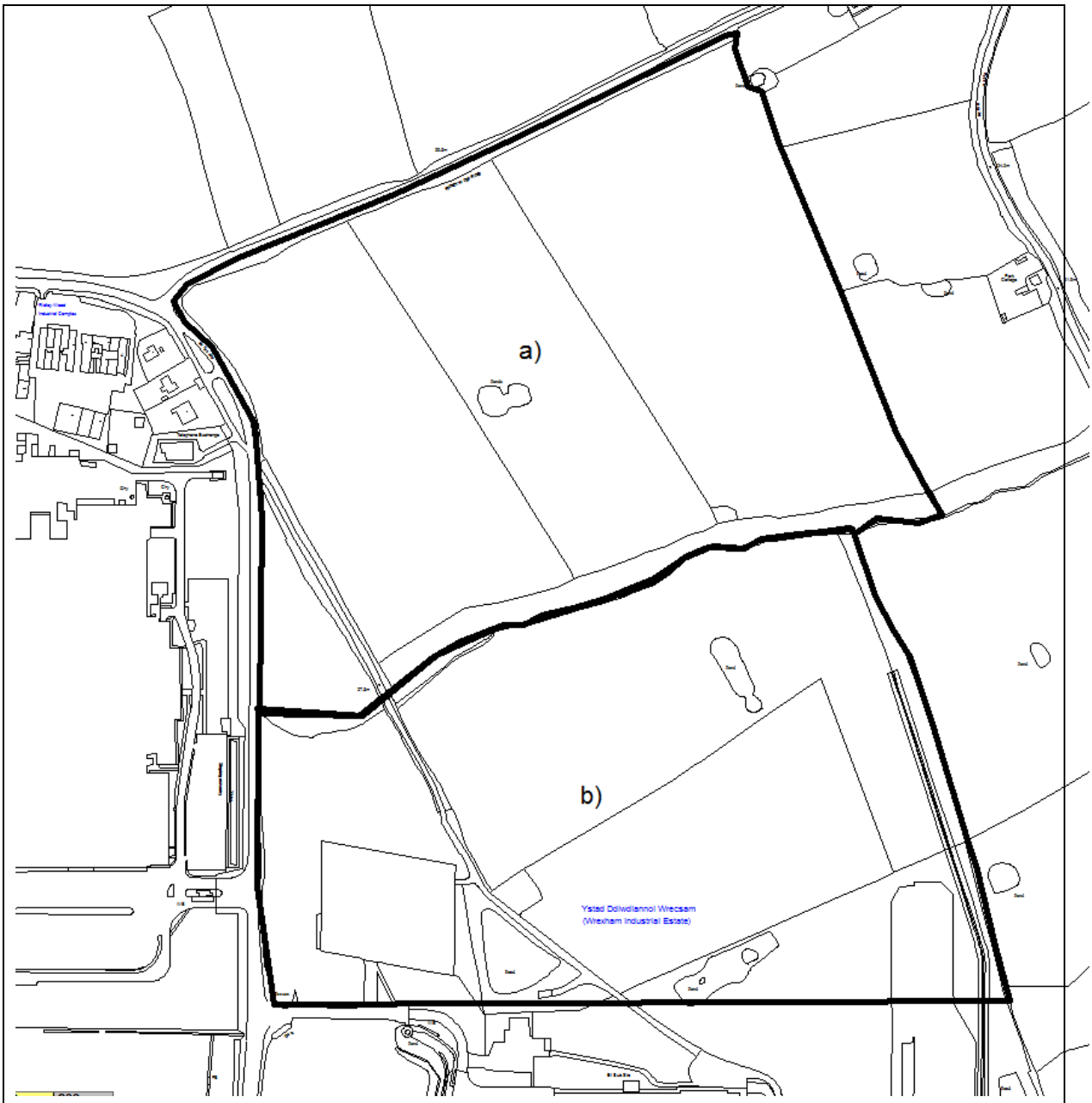
	ecological mitigation area on the northern boundary, trees onsite b) Constraints addressed by the development
Comments	b) Development underway – area to south west has been developed, with remainder not yet started.
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	Yes (in part)
Availability, years	1-3



Site	E1.21 Ridley Wood Road, Wrexham Industrial Estate
Owner	Welsh Government
Agent	Was Legat Owen
Size, ha	3.30
Market Availability	To be taken off the market
Planning Status	UDP Employment Allocation (Ref. 21)
Proposal	-
Constraints	Trees onsite Watercourses cross the edges of the site
Comments	Welsh Government holding the land for the expansion of Cytec and has (or will shortly be) taking it off the market Previously marketed, for sale, as a strategic employment site. Quoting price was £180,000/ha The Council has also received a (confidential) enquiry for this

	land
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No
Availability, years	3-5

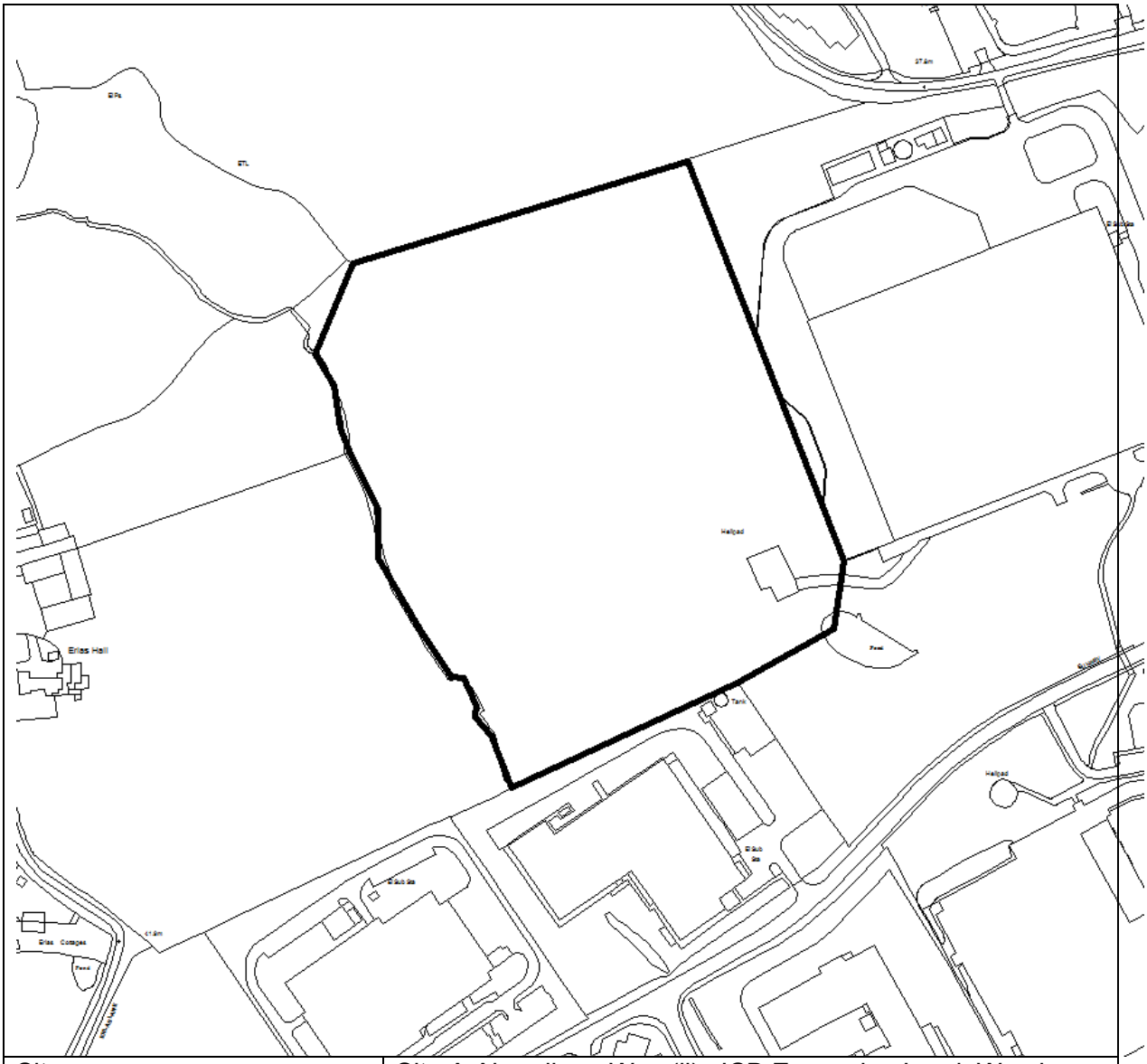
Wrexham Industrial Estate – UDP Policy E3 Single User Site



Site	E3 UDP Single User Site, Wrexham Industrial Estate
Owner	Kingmoor Park Properties
Agent	HOW Planning
Size, ha	32.2
Market Availability	Not available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. E3, Land to be made available to meet the needs of a single user) Northern Section (Site a)) has outline permission for a B8 storage and distribution unit (App. Ref. P/2011/0891) secured

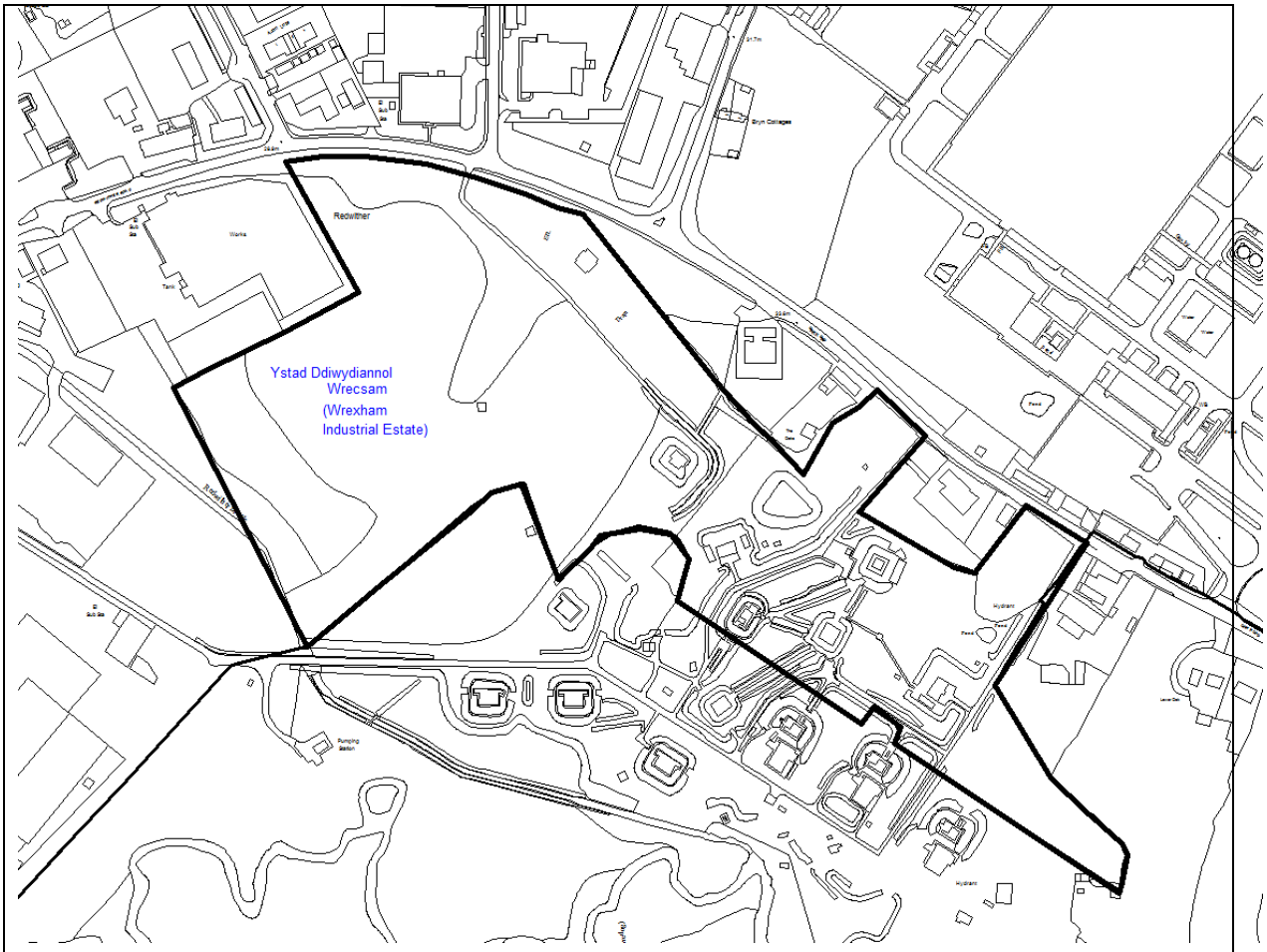
	at appeal (Appeal Ref. APP/H6955/A/09/2188910) in August 2013 Southern Section (Site b))Has outline permission for B2/B8 development (App. Ref. P/2008/0993), with the time to submit reserved matters extended by application P/2013/0270, secured at appeal (Appeal Ref. APP/H6955/A/09/2113258) in May 2010.
Proposal	a) Northern section a) has outline permission for a 46,950 sqm B8 storage and distribution unit on 20.61 ha to be used by Norbert Dentressangle Logistics b) Southern section has outline permission for 37,160 sqm B2/B8 development (comprising 22,159 sqm of B2/B8 space and 2,144 sqm of B1 offices) Some 21 ha of ecological mitigation would be provided around the units. Site is also being considered as a National Strategic Infrastructure Project - submitted by Wrexham Power Limited (Glenfinnan and St. Modwen) as a site for the Wrexham Energy Centre, a new combined cycle gas turbine (CCGT) power station and its integral gas connection (P/2012/0837).
Constraints	Trees onsite, with a dense block of woodland located east-west through the site Ponds and other watercourses Great Crested Newt Breeding Ponds Habitats for a range of protected species Close to various houses and farms These various ecological issues, to be dealt with through the agreed mitigation strategy
Comments	-
Planning Issues	Policy E3 identified this location as a 'Single User Employment Site'. However, the appeal decisions mean that premises for at least two companies can be provided here.
Likely development potential	Industrial
Potential guidance market segment uses	Heavy/Specialist Industrial Site Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No
Availability, years	1-3

Wrexham Industrial Estate – Other Development Land within the Employment Area Boundary



Site	Site A Abendbury Way (ii), JCB Expansion Land, Wrexham Industrial Estate
Owner	JCB
Agent	-
Size, ha	6.00
Market Availability	Not available (Held as expansion land)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development (Site. Ref. A)
Proposal	-
Constraints	-
Comments	Expansion land for JCB who presently occupy 55 percent of their total site Located to the rear of JCB and could only be accessed

	through land under their ownership, thus not readily available to meet the needs of other businesses JCB has announced plans to invest £150 million to expand its operations in Staffordshire and create an additional 2,500 jobs by 2018. The projected growth in machine production from Staffordshire factories will be supported by an increase in manufacture of components from factories elsewhere in the UK, including axles and gearboxes from the Wrexham plant. In time, this may necessitate an expansion of JCB facilities at Wrexham Industrial Estate.
Planning Issues	Green Barrier to the north (Policy EC1)
Likely development potential	Industrial
Potential guidance market segment uses	Heavy/Specialist Industrial Site Site for Specific Occupiers
Serviced	No
Availability, years	5+

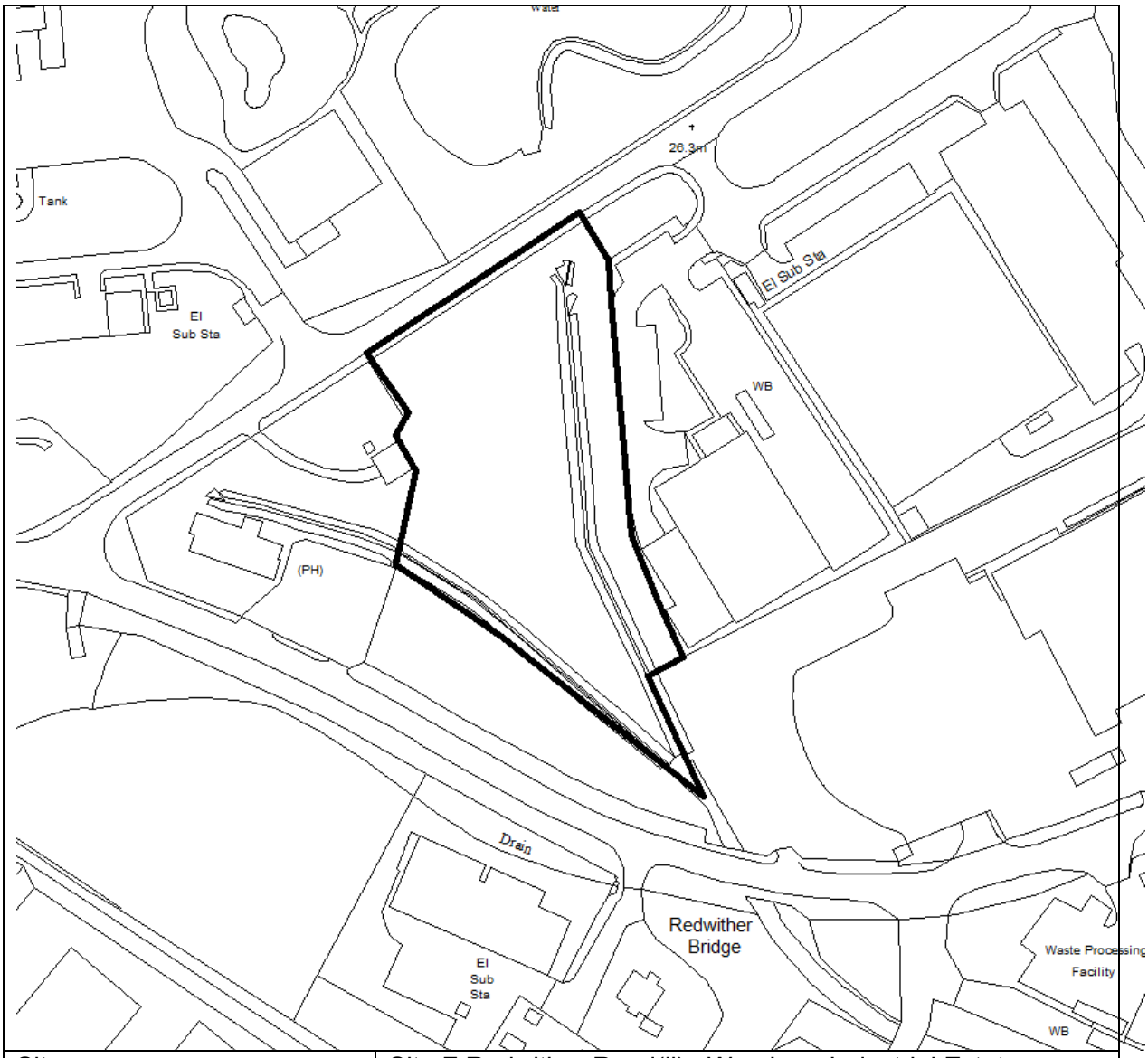


Site	Site B Cefn Park, Redwither Road, Wrexham Industrial Estate
Owner	Cefn Park Estates
Agent	-
Size, ha	11.50
Market Availability	Not available (Likely Undevelopable)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and has previously been considered suitable for B1/B2/B8 development. Previous outline permission for industrial uses (App. Ref. P/2000/0019) has now expired.
Proposal	-
Constraints	Part of a wider wildlife site, extending south to the River Clywedog, and is now considered undevelopable due to multiple ecological constraints Pylons cross the site Trees onsite Various footpaths cross the site Remains of multiple small buildings on the site
Comments	Assumed to be undevelopable
Planning Issues	South west of the site is in a floodrisk area (Policy EC12)
Likely development potential	-

Potential guidance market segment uses	-
Serviced	No
Availability, years	5+

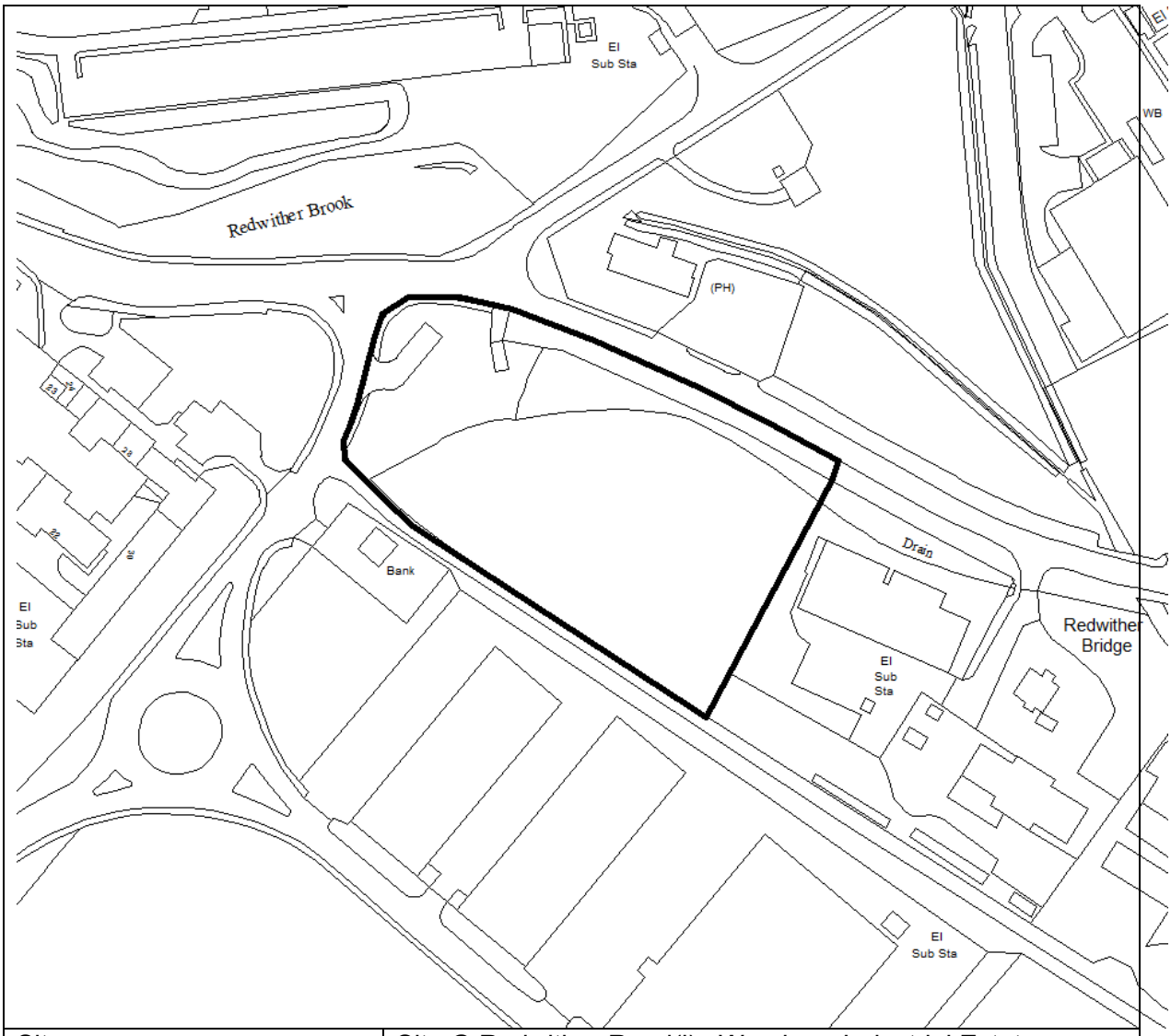
Site	Site C Coed Aben Road (ii & iii), Wrexham Industrial Estate
Owner	First Investments and Guy Tyrell
Agent	Legat Owen
Size, ha	1.7
Market Availability	On the Market
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development.
Proposal	-
Constraints	Includes an area of hardstanding Trees onsite Small pond and wet area to the rear

	Central part of site comprises short perennial and semi improved grassland. Grizzled Skipper Butterflies and Great Crested Newt recorded on site Council Ecologist view is that the central area of the site (some 0.55 ha) should be retained, for ecology, leaving the north and south of the site (1.15 ha) available for development.
Comments	On the market, for sale, as development or storage plots of 0.40 ha or more.
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



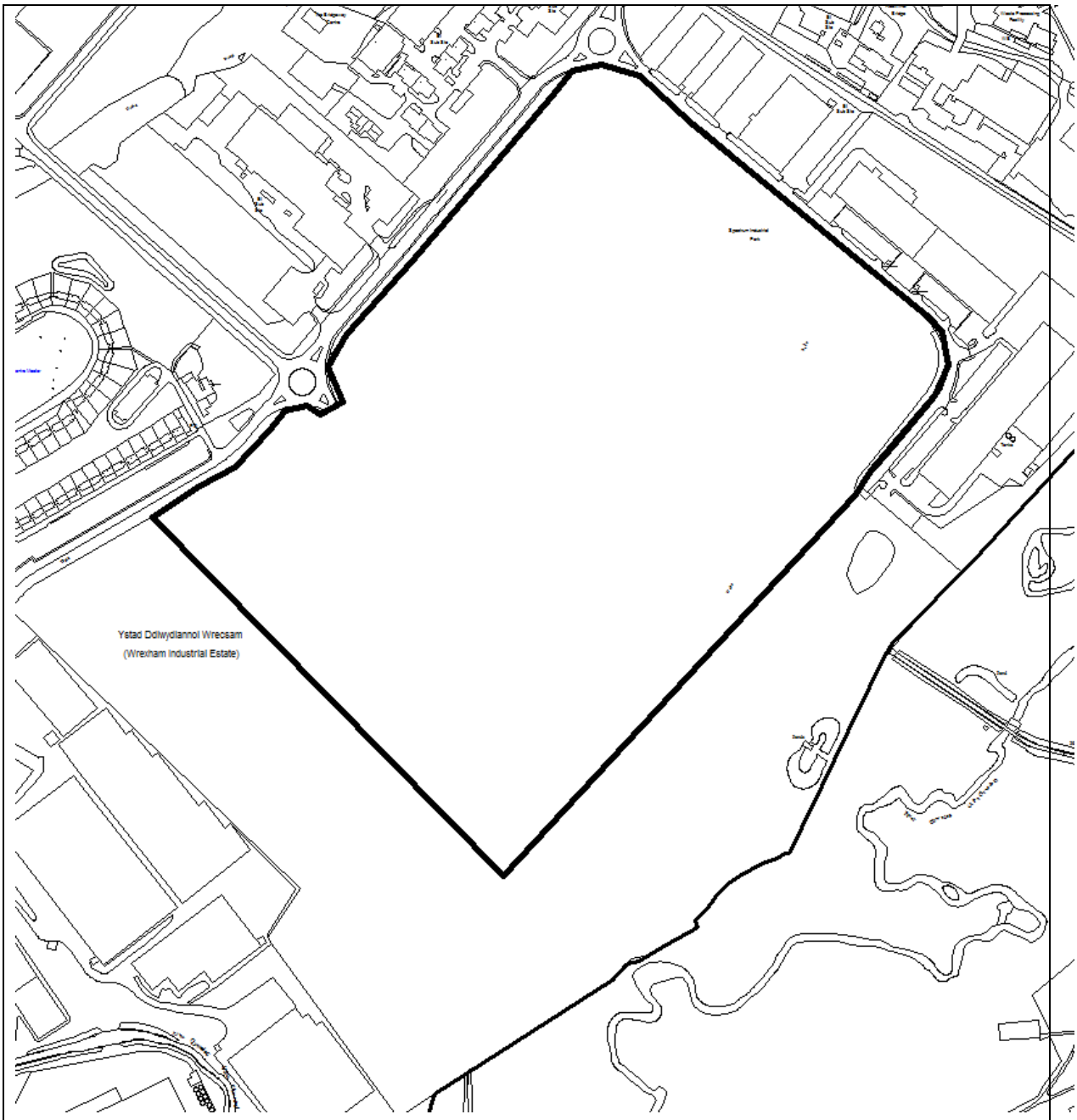
Site	Site F Redwither Road(ii), Wrexham Industrial Estate
Owner	I C Properties
Agent	-
Size, ha	0.74
Market Availability	Not available (Held as Expansion Land)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development (Site. Ref. F)
Proposal	-
Constraints	Watercourse crosses the site (forms part of a wildlife corridor) Flood risk area Trees onsite
Comments	Forms part of a wider ownership which extends to include the unit to the north, which is occupied by Nutrafeed (as their headquarters) Likely to be held for the future expansion of that business

Planning Issues	Planning enforcement case relating to the inappropriate development of fencing and earthworks
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



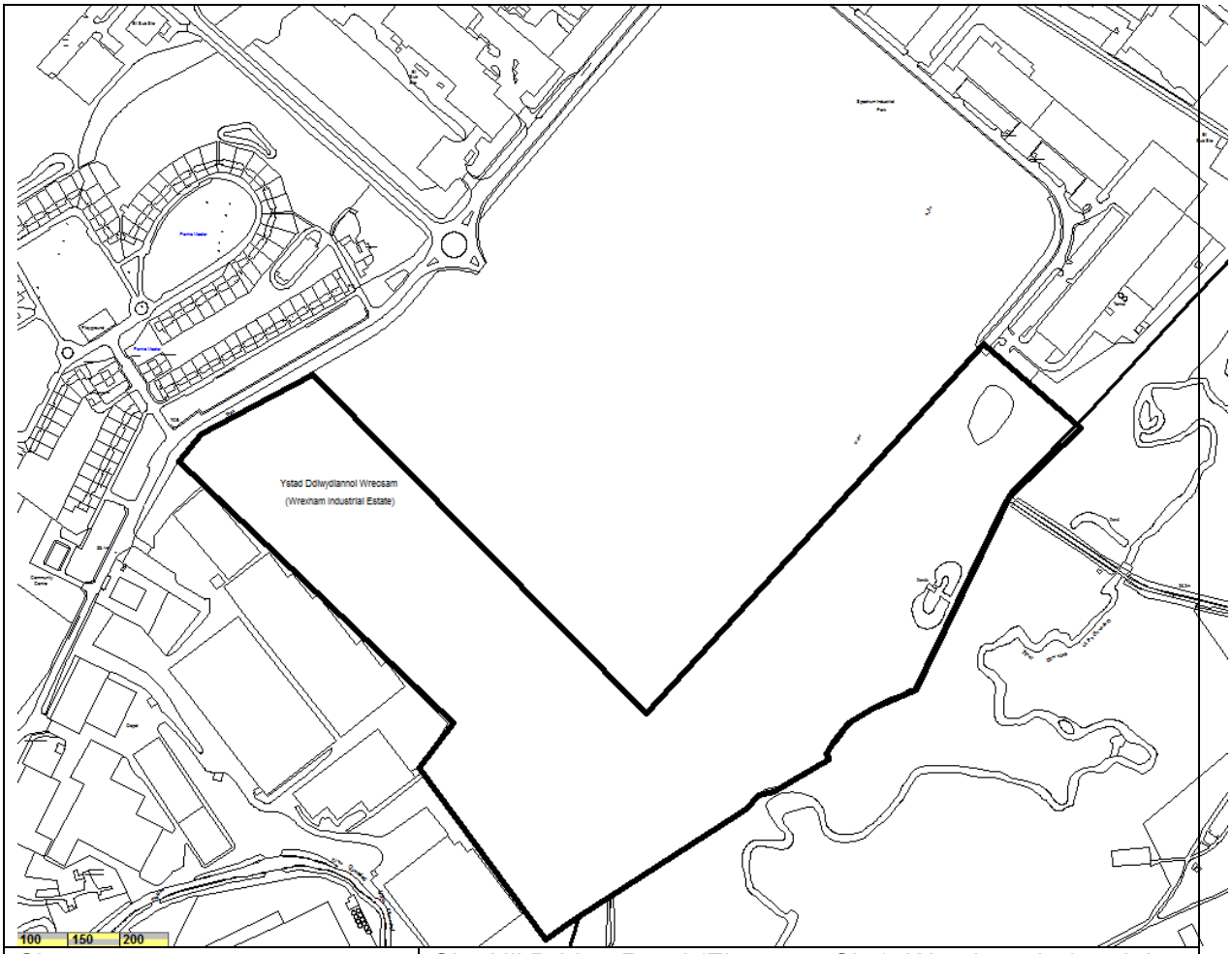
Site	Site G Redwither Road(i), Wrexham Industrial Estate
Owner	Private Individual
Agent	-
Size, ha	0.99
Market Availability	Not available (Held as Expansion Land/May be undevelopable)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development
Proposal	-
Constraints	Forms part of a wildlife corridor Significant tree coverage on site (broad leaved woodland, possibly including a rare fruit tree). The Council Ecologist view is that this site would make an ideal ecological reserve area.
Comments	Expansion land for the adjacent multi-let industrial complex (Redwither Works). However, land could not be developed without the loss of much of the established woodland and the likely interference with the wildlife corridor
Planning Issues	-

Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	5+



Site	Site Hi Bridge Road (Firestone Site), Wrexham Industrial Estate
Owner	Welsh Government
Agent	-
Size, ha	26.00
Market Availability	Not available (Development Underway)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development (Site. Ref. Hi) 26.1 ha has outline planning permission for a prison (App. Ref. P/2013/0671) with ecological mitigation set aside in adjoining site Hii.

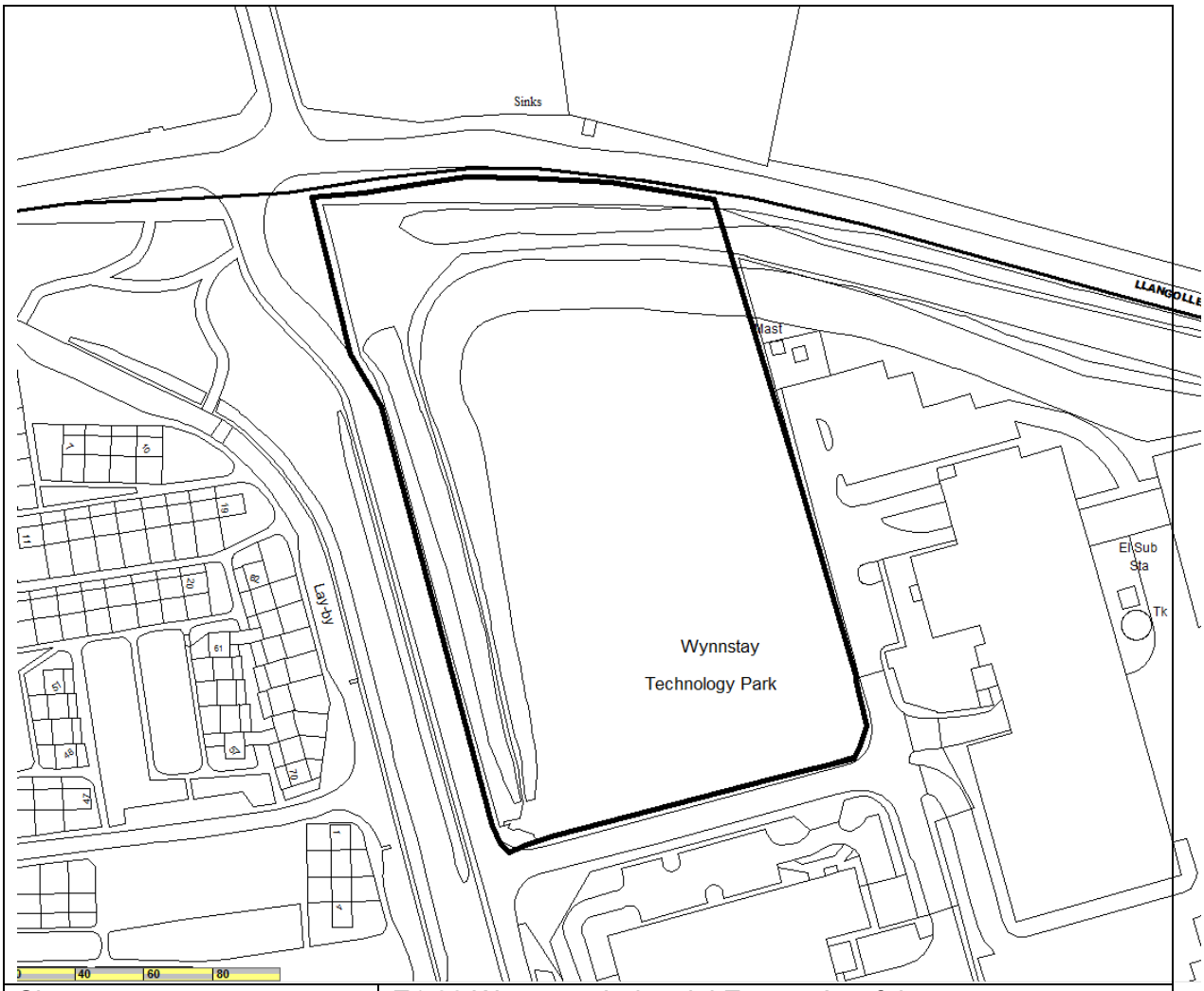
Proposal	26.1 ha has outline planning permission for a 76,370 sqm prison, with a secure perimeter fence, access, parking, visitor/support building, energy centre and associated landscaping.
Constraints	Ecological issues including a number of protected species (ecological mitigation to be focussed on Site Hii).
Comments	Initial site preparation and ecological mitigation activities (including the erection of Great Crested Newt fencing) are underway, overseen by Natural Resources Wales Construction works are expected to begin in Summer 2014 The Prison will be fully operational be September 2017 Site will be developed for a 2,100 place prison, holding Category C adult male prisoners
Planning Issues	-
Likely development potential	Prison
Potential guidance market segment uses	Site for Specific Occupiers
Serviced	No
Availability, years	0-1



Site	Site Hii Bridge Road (Firestone Site), Wrexham Industrial Estate
Owner	Welsh Government
Agent	-
Size, ha	20.1
Market Availability	Not available (Mitigation Land)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development. 26.1 ha has outline planning permission for a prison on adjacent site Hi (App. Ref. P/2013/0671), with the majority of this site set aside for ecological mitigation.
Proposal	26.1 ha (primarily be in Site Hi) has outline planning permission for a 76,370 sqm prison, with a secure perimeter fence, access, parking, visitor/support building, energy centre and associated landscaping. The bulk of Site Hii will be protected for ecological mitigation.
Constraints	A number of protected species recorded onsite Ponds onsite (including Great Crested Newt Habitats) Gas main crosses south of site Watercourses cross the site

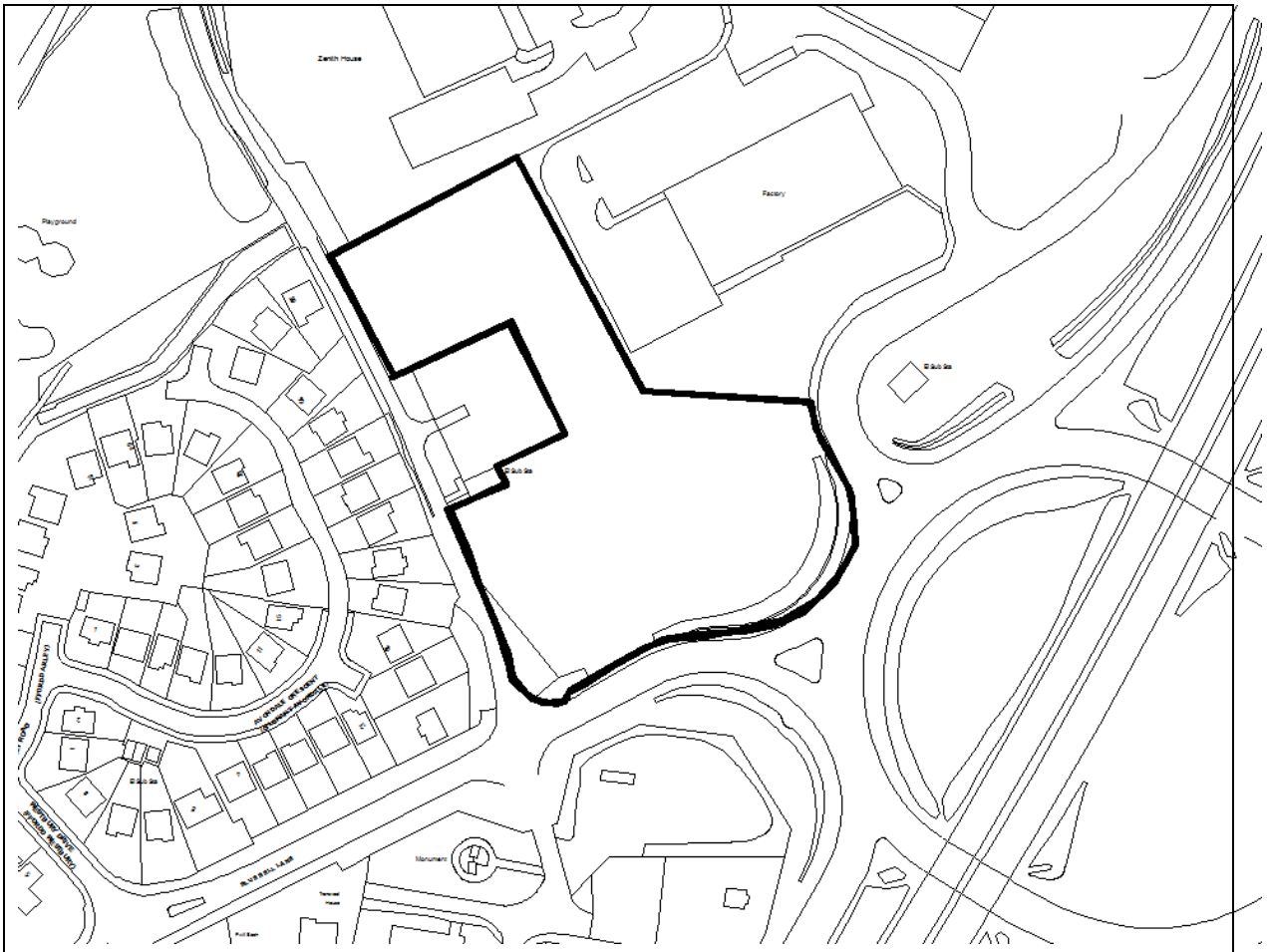
	Environmental corridor associated with the Clywedog River to the south
Comments	Initial site preparation and ecological mitigation activities (including the erection of Great Crested Newt fencing) are underway for the prison, overseen by Natural Resources Wales. Adjacent owner F Lloyd Penley has a requirement for some 2.4 ha of expansion land in the west of the site to accommodate a new 14,864 sqm logistics unit. This would be integrated into their existing site, with access coming from within that site. It is understood that the company would either acquire 2.4 ha and pay a commuted sum for an 'off site' mitigated area, or the company will purchase 4.8 ha, taking responsibility for a mitigated area within its own site boundaries.
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	Site for Specific Occupiers
Serviced	No
Availability, years	5+

Land Elsewhere in Wrexham — Sites Allocated under UDP Policy E1

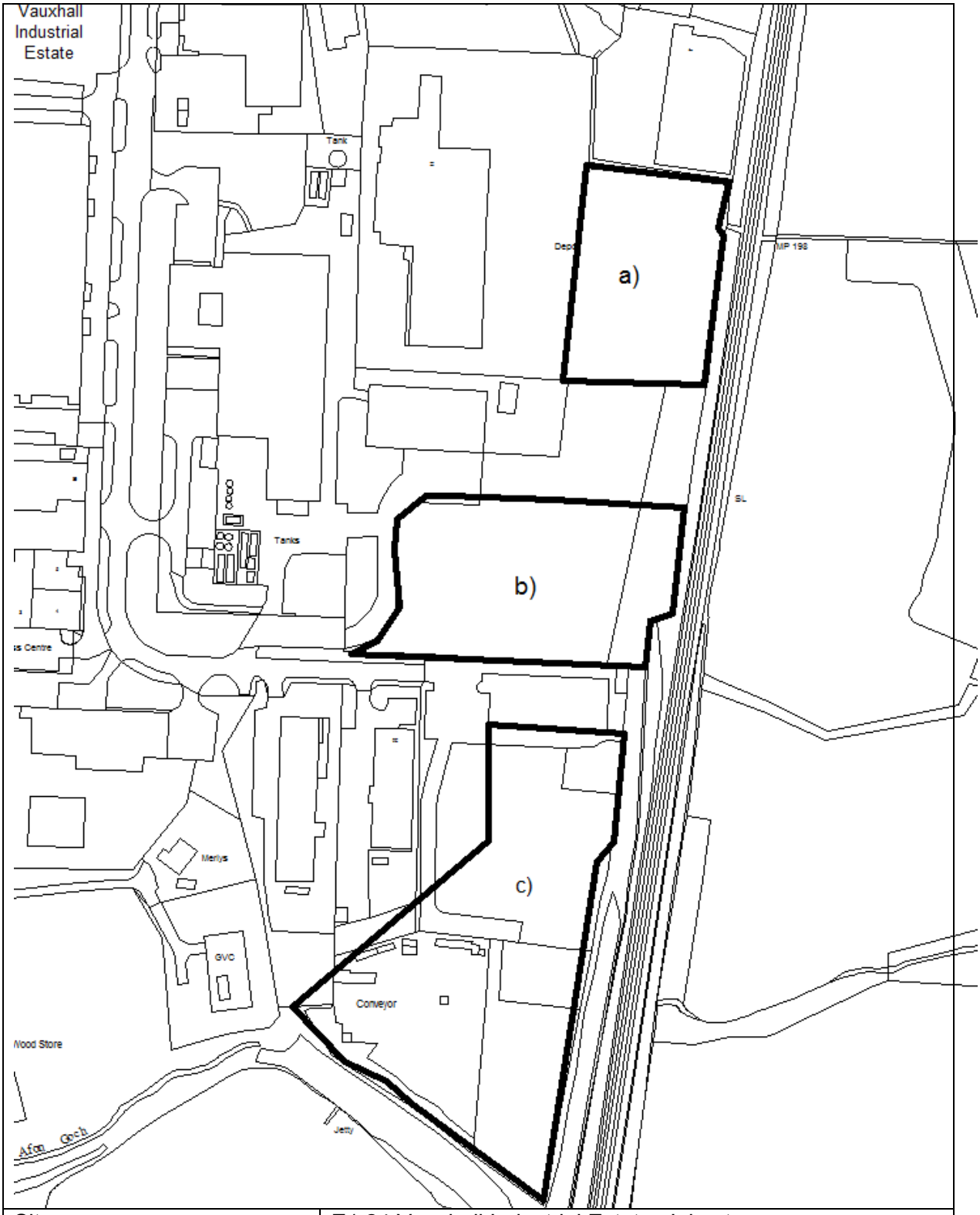


Site	E1.22 Wynnstay Industrial Estate, Acrefair
Owner	NS Holdings
Agent	-
Size, ha	1.40
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 22)
Proposal	Previously proposed for housing, but a planning application was refused and dismissed at appeal.
Constraints	Trees onsite
Comments	Remaining development plot at Wynnstay Technology Park (Plot 1) No known developer/occupier interest at this time
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site

	Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No
Availability, years	5+

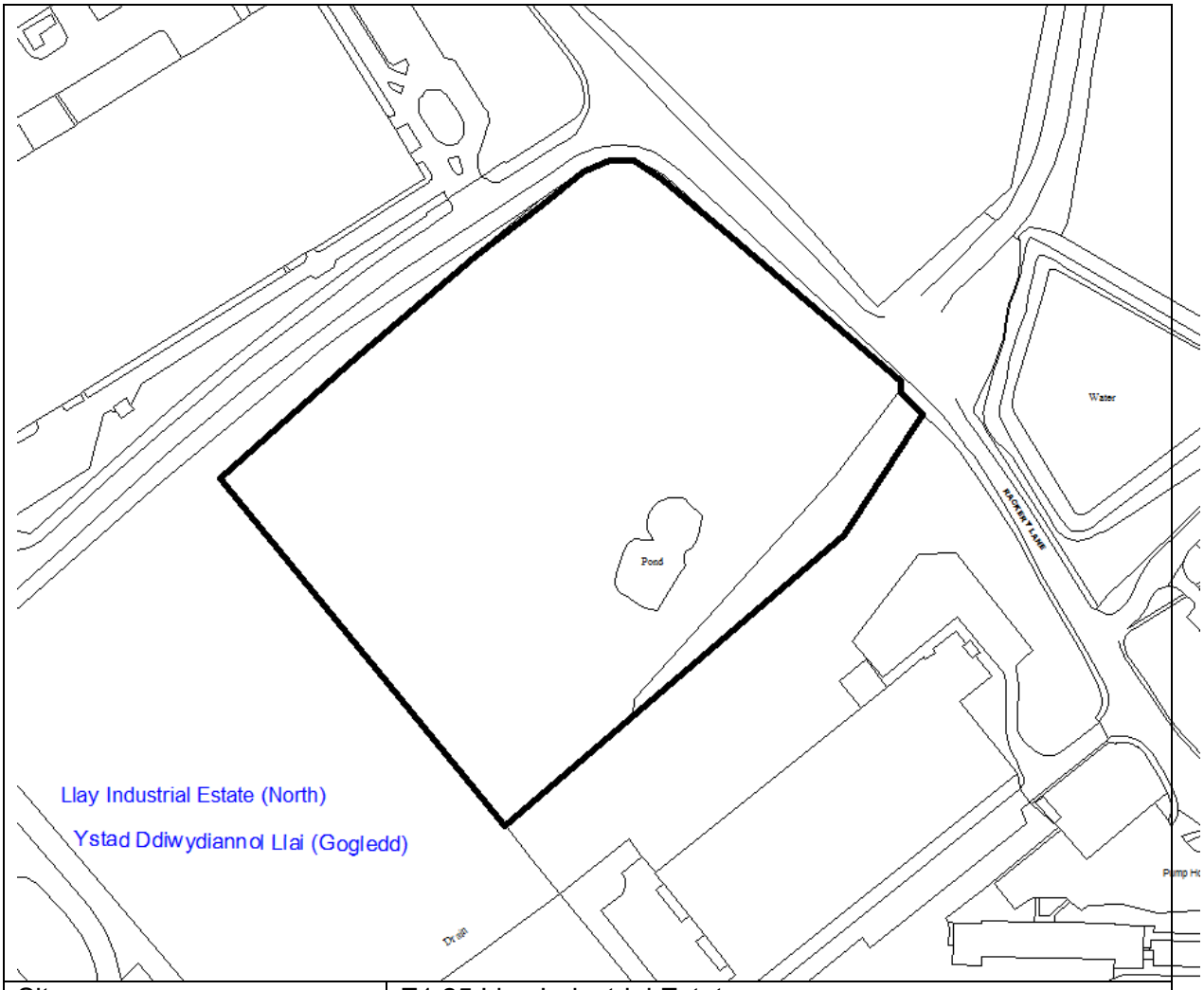


Site	E1.23 Gresford Industrial Estate, Pandy
Owner	IMW and M Jones
Agent	MTP
Size, ha	1.10
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 23)
Proposal	Outline application (P/2009/0732) for three B1 business units on 0.92 ha has now expired.
Constraints	Site surrounds an electricity substation Much of site is wooded Housing adjacent
Comments	Not clear if owners have any intention to develop this site following lapsing of previous permission.
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



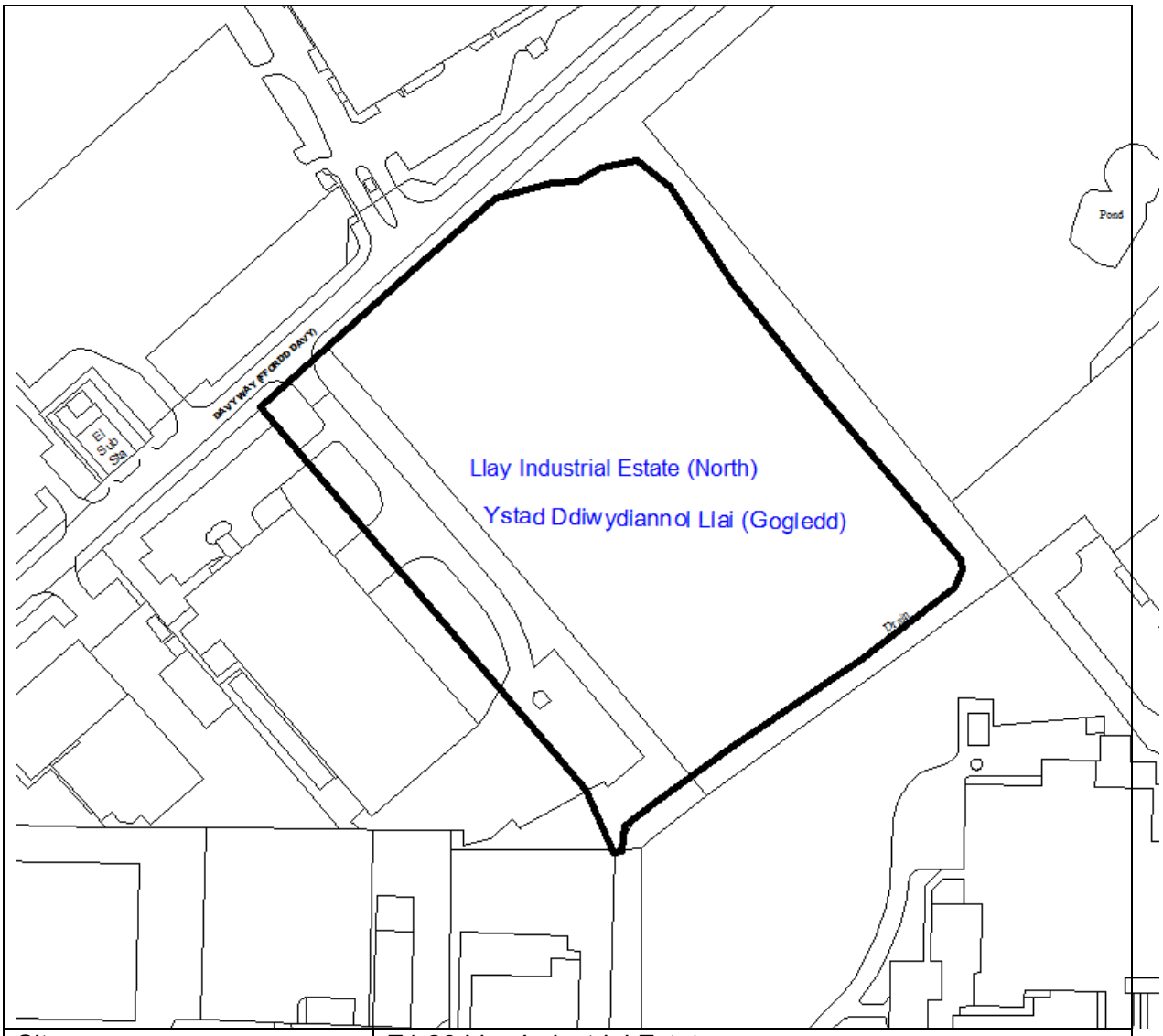
Site	E1.24 Vauxhall Industrial Estate, Johnstown
Owner	Northern Site (Site (a)): Vale of Llangollen Travel Central Site (Site (b)):Flint Group Southern Site (Site (c)): Multiple private individuals
Agent	-

Size, ha	0.71 (2.5 originally, 1,79 ha developed or constrained)
Market Availability	Not Available (Expansion Land/In Use)
Planning Status	UDP Employment Allocation (Ref. 24) c) Full planning permission (App. No. P/2012/0428) for the erection of a steel framed storage shed.
Proposal	c) Full planning permission for the erection of a 119 sqm steel framed storage shed on 0.10 ha, for the use of the adjacent occupier (Flint Group). Remains undeveloped.
Constraints	b) Trees onsite c) Site of ecological value (Monks Pool) to the south Stryt Las A'r Hafod Site of Special Scientific Interest to the east, further ecological surveys would be required prior to any development Sites a and c are backland sites which cannot be independently accessed from the industrial estate roads.
Comments	a) In active use for coach parking by Vale of Llangollen Travel b) Unused c) Most of site is in use for open storage by Flint Group
Planning Issues	Green Barrier to the south and east (Policy EC1)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



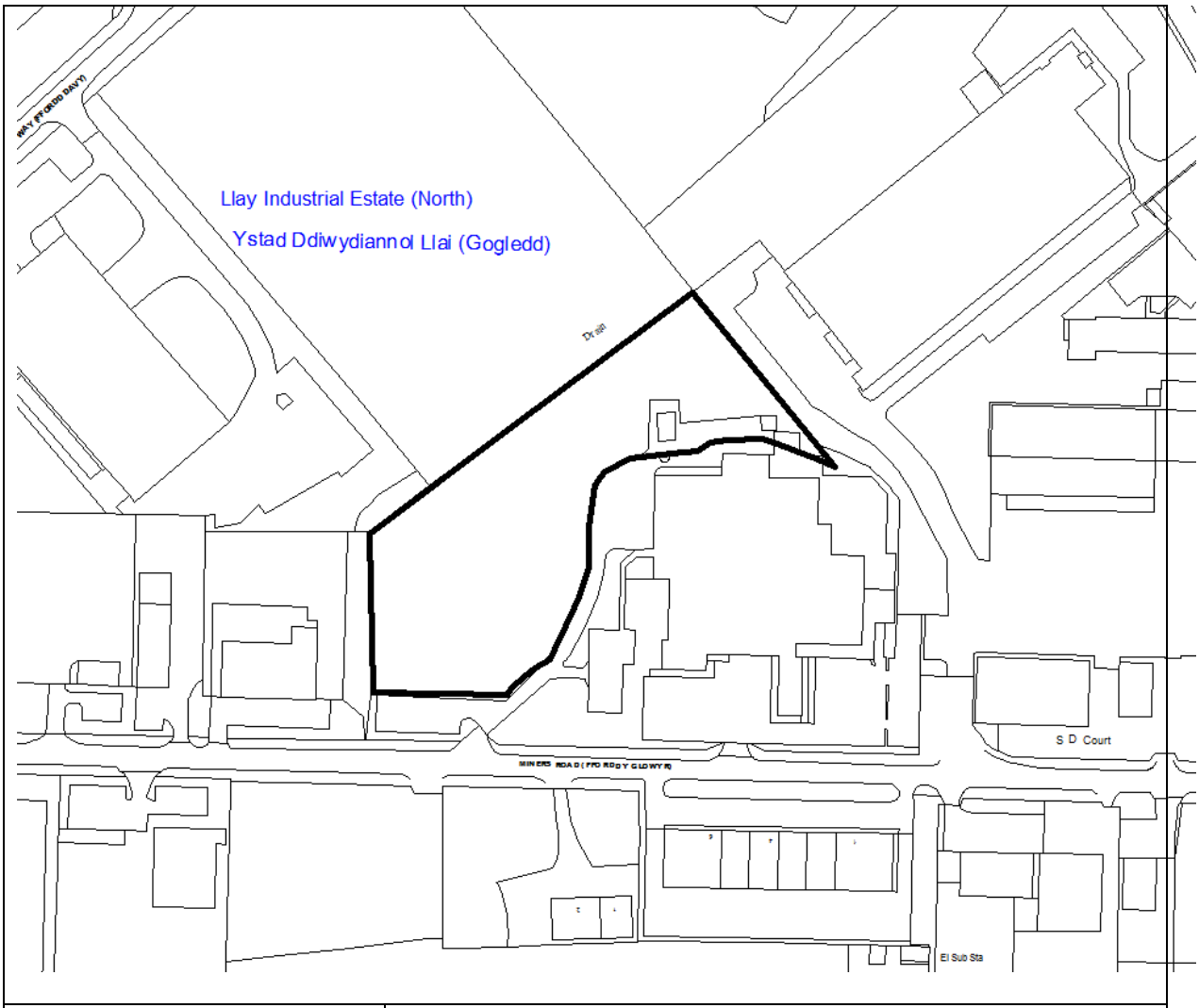
Site	E1.25 Llay Industrial Estate
Owner	North Wales Police
Agent	-
Size, ha	3.30
Market Availability	Not available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. 25)
Proposal	-
Constraints	Sloping Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation
Comments	This site (and Site 26) was purchased from Sharp in late 2013 North Wales Police intend to build a new custody suite and offices here, relocating most of their facilities from the current building in Wrexham Town Centre Subject to planning, this new facility will form a new divisional

	HQ serving Wrexham and Flintshire Detailed timetable for the development has not been established.
Planning Issues	-
Likely development potential	Office
Potential guidance market segment uses	Established/Potential Office Location Site for Specific Occupiers
Serviced	No
Availability, years	1-3



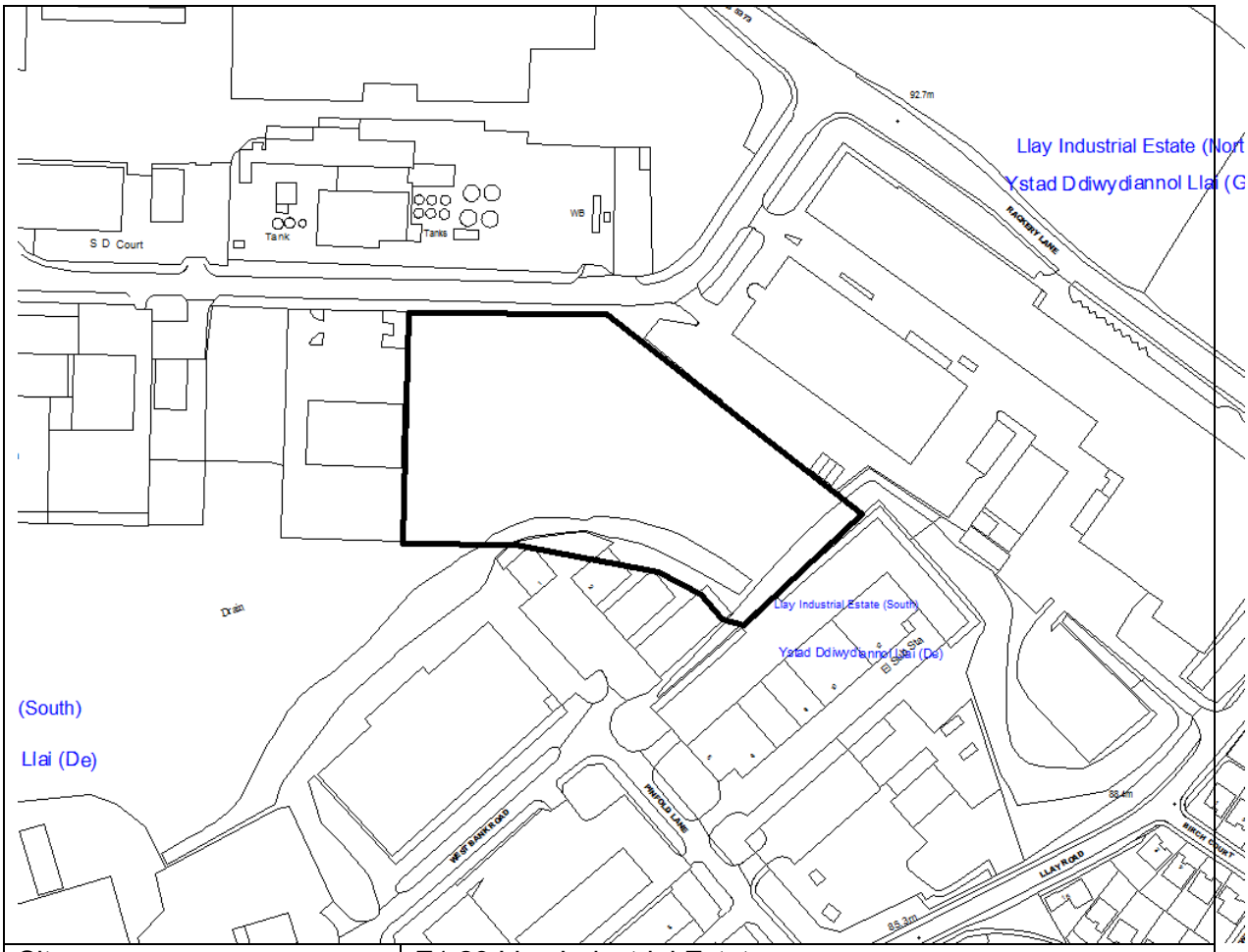
Site	E1.26 Llay Industrial Estate
Owner	North Wales Police
Agent	-
Size, ha	2.9
Market Availability	Not available (Owner has aspirations for development)
Planning Status	UDP Employment Allocation (Ref. 26)
Proposal	-
Constraints	Sloping Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation
Comments	This site (and Site 25) was purchased from Sharp in late 2013 North Wales Police intend to build a new custody suite and offices here, relocating most of their facilities from the current building in Wrexham Town Centre

	Subject to planning, this new facility will form a new divisional HQ serving Wrexham and Flintshire Detailed timetable for the development has not been established
Planning Issues	-
Likely development potential	Office
Potential guidance market segment uses	Established/Potential Office Location Site for Specific Occupiers
Serviced	No
Availability, years	1-3

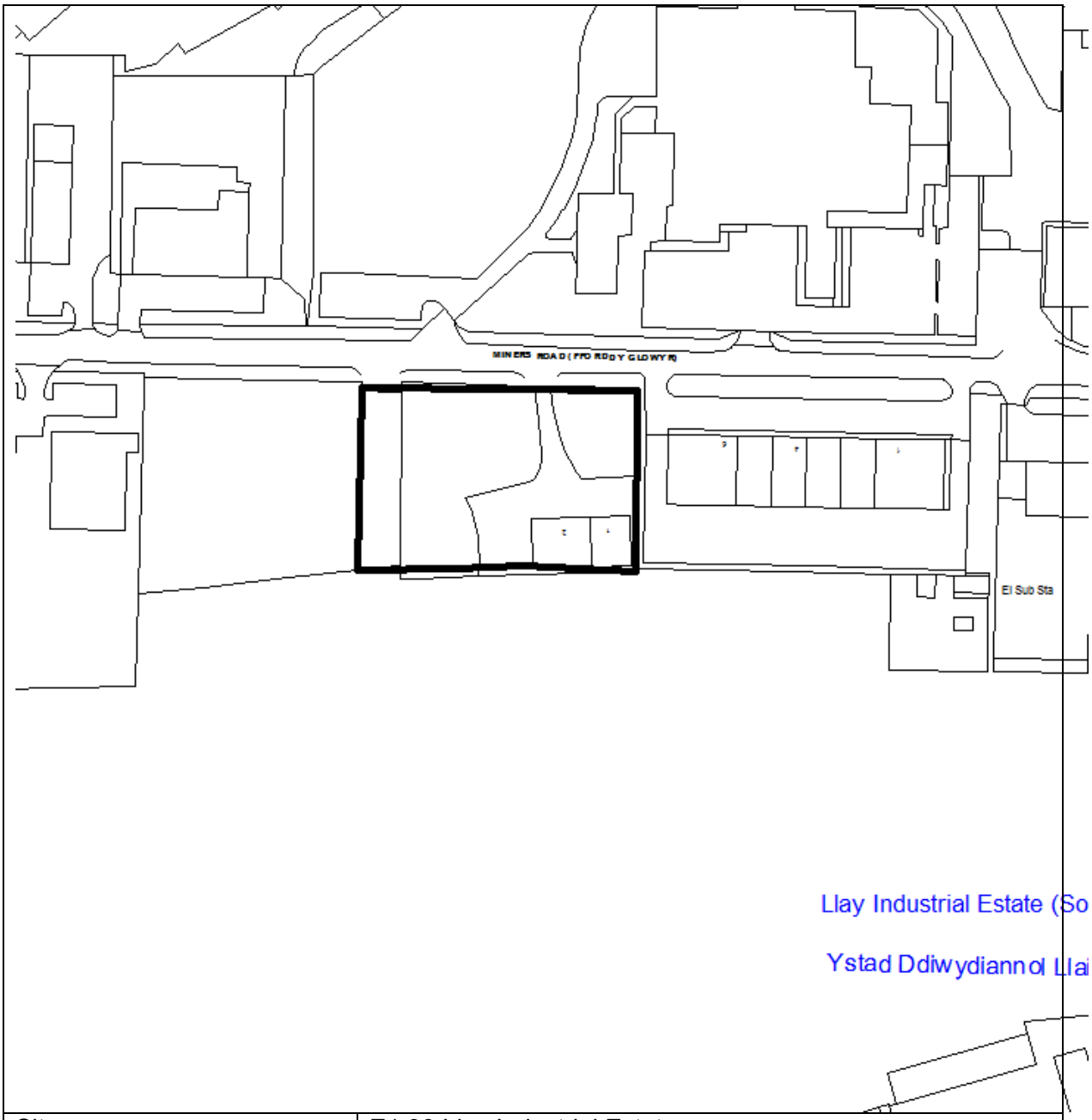


Site	E1.28 Llay Industrial Estate
Owner	Not known (Land Registry records not available)
Agent	-
Size, ha	1.4
Market Availability	Not available (May not be Developable)
Planning Status	UDP Employment Allocation (Ref. 28)
Proposal	-
Constraints	Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation Land is bounded by existing businesses in the south and Sharp's landholdings in the north, providing a separate access would be difficult
Comments	Landlocked site with unclear ownership, may not be developable
Planning Issues	-
Likely development potential	Office/Industrial
Potential guidance market	Established/Potential Office Location

segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupiers
Serviced	No
Availability, years	5+

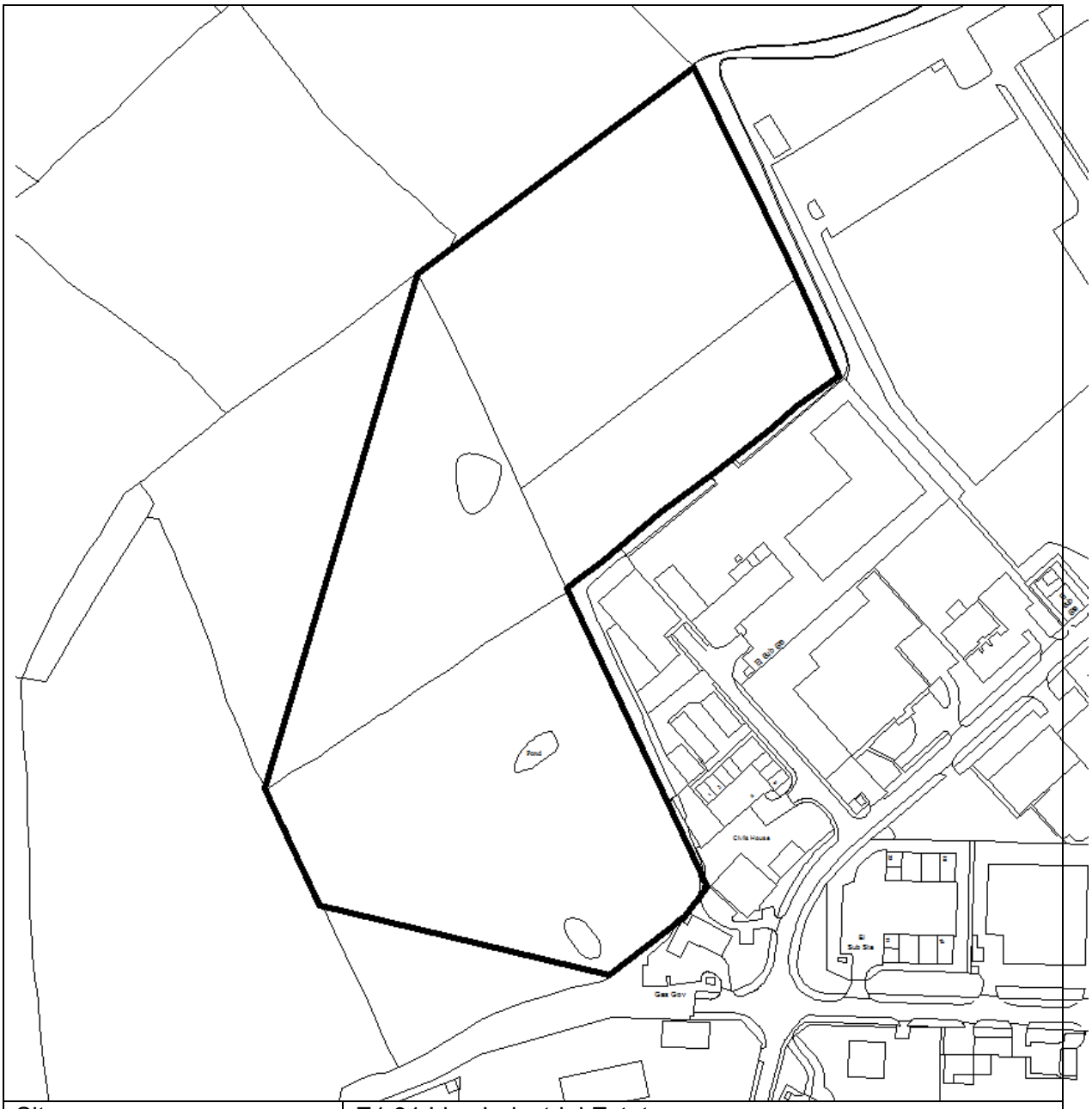


Site	E1.29 Llay Industrial Estate
Owner	Poole Bay Construction Company
Agent	-
Size, ha	1.2
Market Availability	Not Available (Held as Expansion Land)
Planning Status	UDP Employment Allocation (Ref. 29)
Proposal	-
Constraints	Trees onsite Various footpaths cross the site
Comments	Held as a long term asset by a national construction firm No plans for development here at present
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



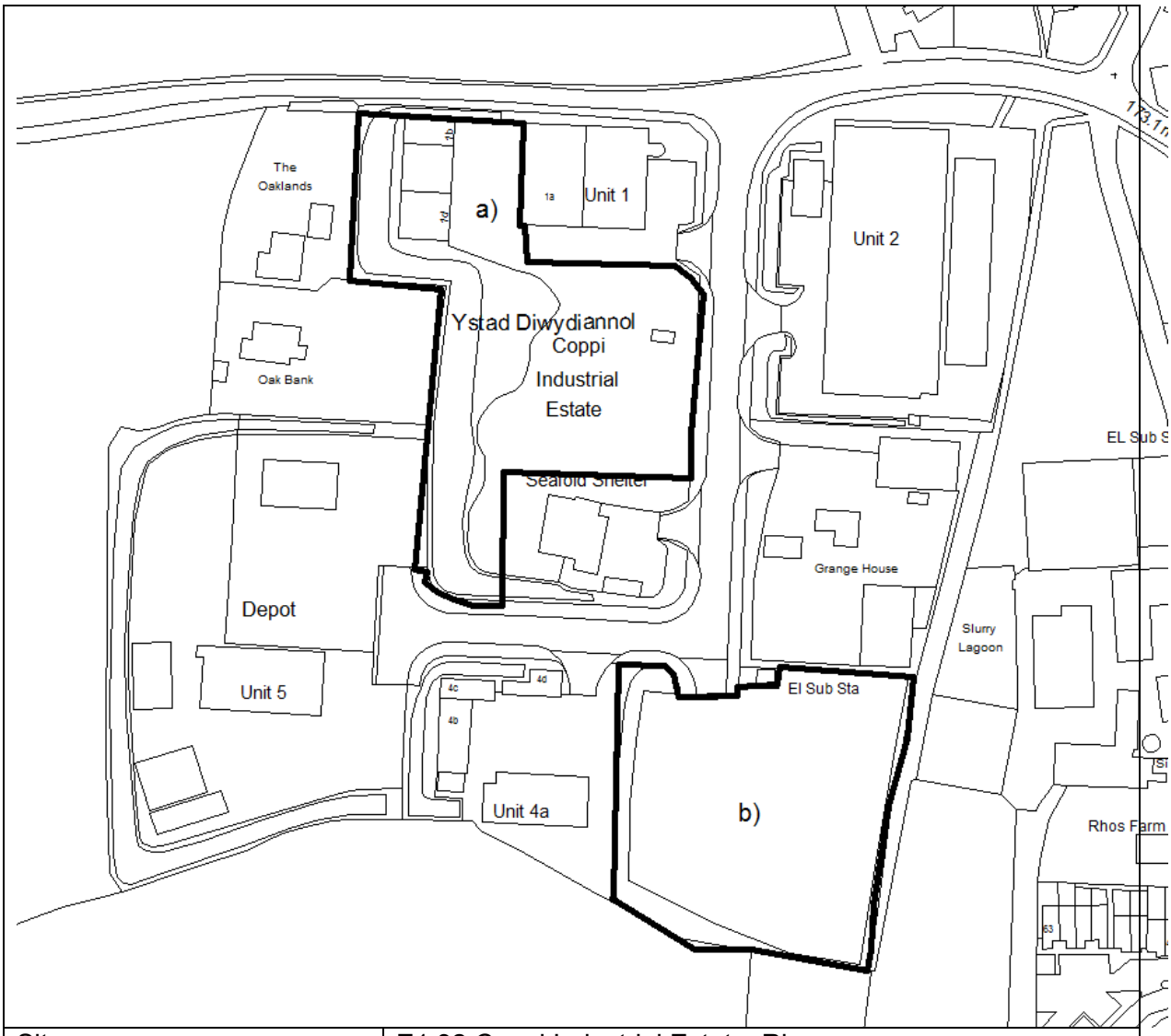
Site	E1.30 Llay Industrial Estate
Owner	D & D James
Agent	-
Size, ha	0.47 (Originally 0.8, 0.33 has been partially developed)
Market Availability	Not Available (In Use)
Planning Status	UDP Employment Allocation (Ref. 30) Full planning permission (App. Ref. P/2007/1150) for a steel framed industrial unit
Proposal	Full planning permission for a steel framed industrial unit. Unit developed to a steel frame some years ago, with no subsequent construction
Constraints	-
Comments	Most of site is in active use by D & D James Steel Buildings (who have a developed unit on the site) for premises and car

	parking. I&S Car Centre also operates from an adjoining unit The unfinished steel frame unit is used for open storage and as a 'demonstration facility' to illustrate D & D James' building techniques Not clear if it will ever be fully completed
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



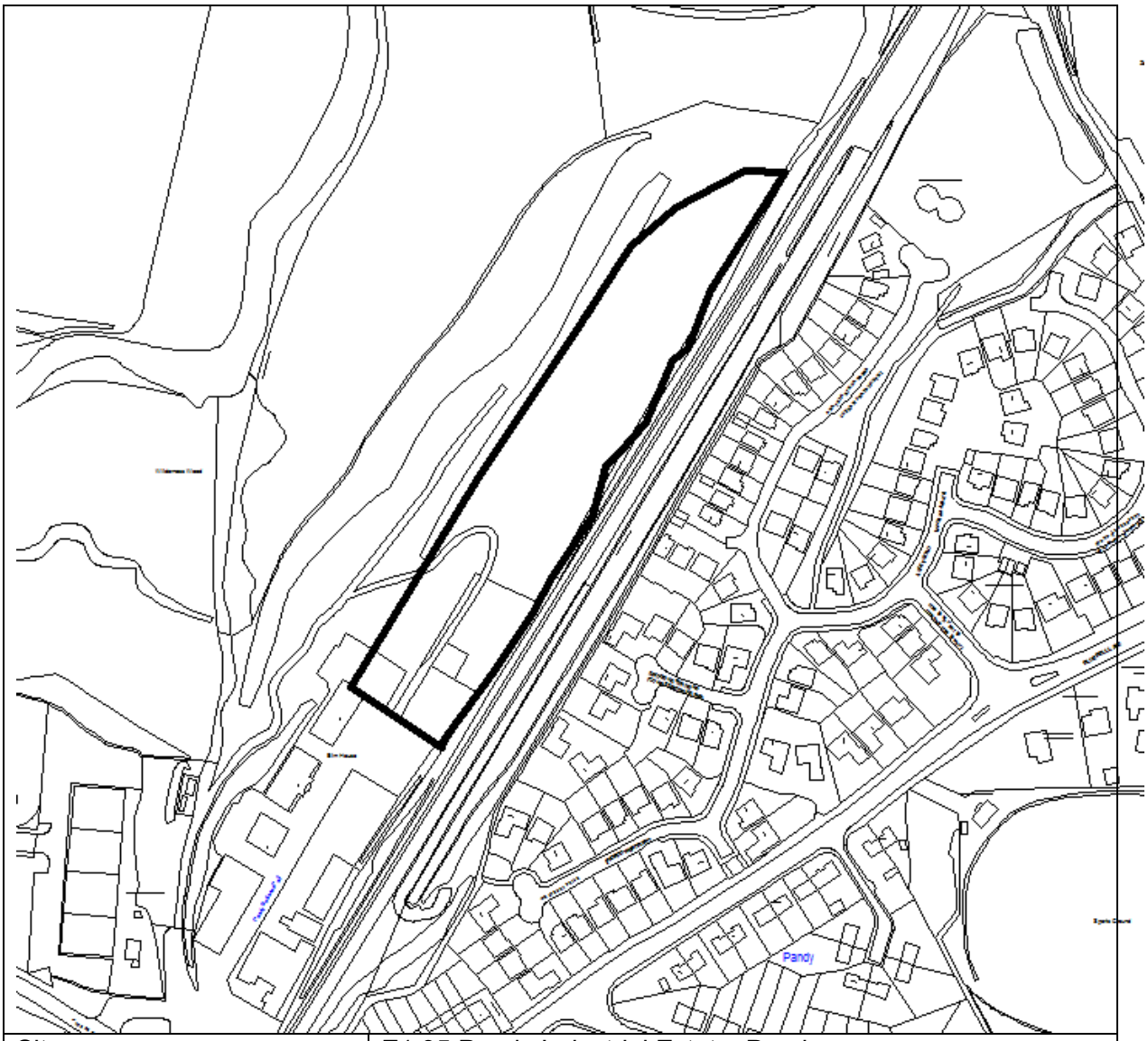
Site	E1.31 Llay Industrial Estate
Owner	Multiple including Wrexham County Borough Council, Marlin Industries and several private individuals
Agent	-
Size, ha	6.4 (7.5 originally – 1.1ha developed)
Market Availability	Not Available (May not be Developable)
Planning Status	UDP Employment Allocation (Ref. 31)
Proposal	-
Constraints	Trees onsite Multiple ownerships Backland site, any access to Llay Industrial Estate would have to pass through the ownerships of existing businesses Great Crested Newts possibly present on edge of site.
Comments	(Primarily) greenfield expansion land for Llay Industrial Estate

	North eastern portion of site is in use for open storage by Marlin Industries Remainder is in active agricultural use No identified plans for development on this site Access constraints and multiple ownerships would make it difficult to deliver a single coherent development here
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Heavy/Specialist Industrial Site Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No
Availability, years	5+



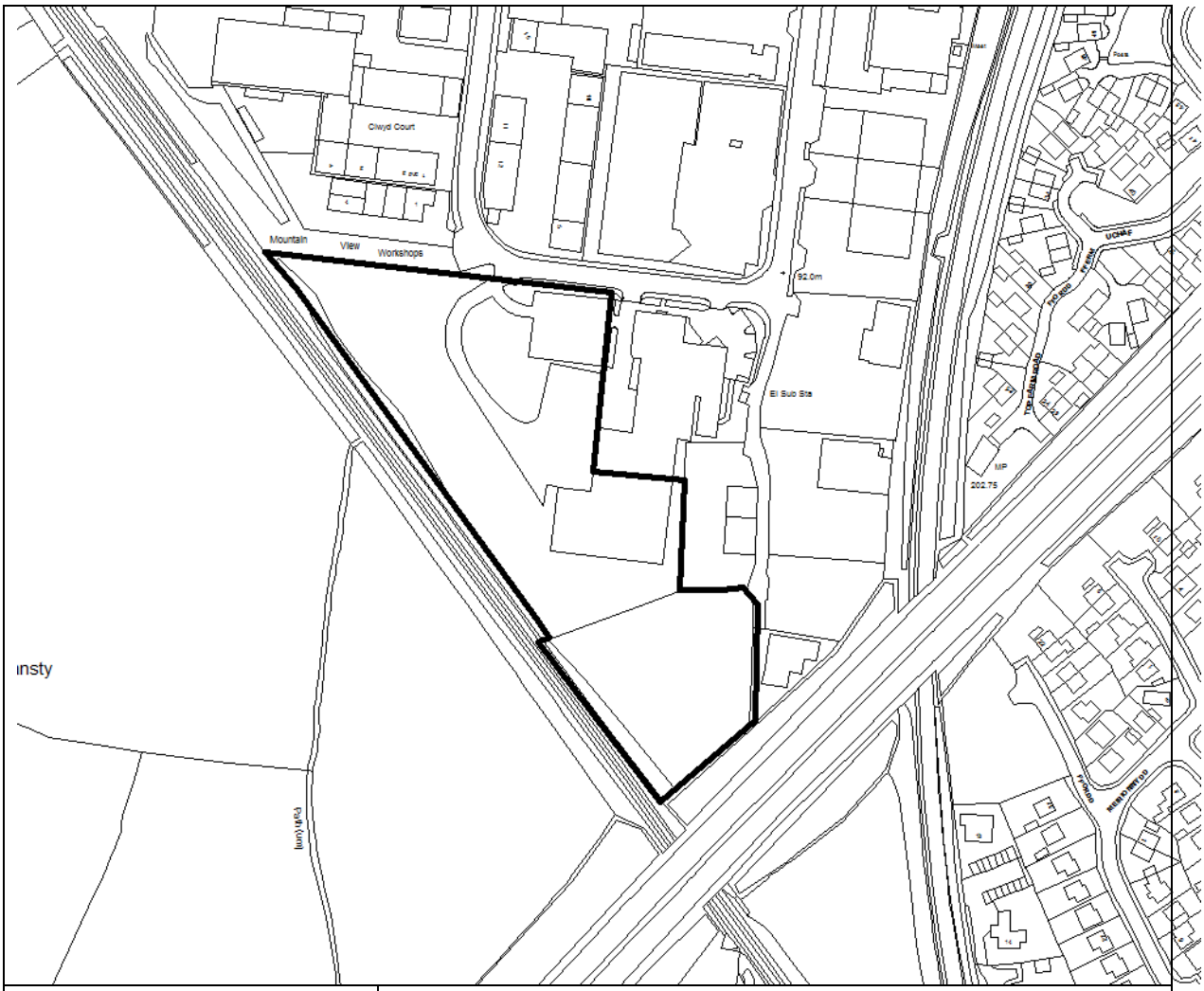
Site	E1.32 Coppi Industrial Estate, Rhos
Owner	Northern Site (Site (a)): Not known, Land Registry Data not available Southern Site (Site (b)): Private individual
Agent	-
Size, ha	0.40 (0.81 originally, 0.41 seems to be in use)
Market Availability	Not Available (In Use)
Planning Status	UDP Employment Allocation (Ref. 32) a) Full planning permission for the parking of private hire vehicles. This does not appear to have been taken up.
Proposal	a) Full planning permission for the parking of private hire vehicles.
Constraints	b) Trees onsite
Comments	a) North west portion of the site has been developed for two terraced industrial units. No evidence of activity on the rest of the site b) In use for open storage by an unidentified business
Planning Issues	a) Special Landscape Area (Policy EC5) to the north
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+



Site	E1.35 Pandy Industrial Estate, Pandy
Owner	Lloyd Morris Holdings
Agent	-
Size, ha	0.70 (Originally 1.1, 0.4 developed)
Market Availability	Not Available (Expansion Land)
Planning Status	UDP Employment Allocation (Ref. 35) Full Planning Permission for 2 industrial units (App Ref. P/2010/0908) on 0.085 ha.
Proposal	Full Planning Permission for 2 industrial units totalling 855 sqm on 0.085 ha
Constraints	Trees onsite
Comments	Growth land for Pandy Industrial Estate
Planning Issues	Adjacent Walking/Cycling Routes (Policy T10)
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers

Serviced	No
Availability, years	3-5



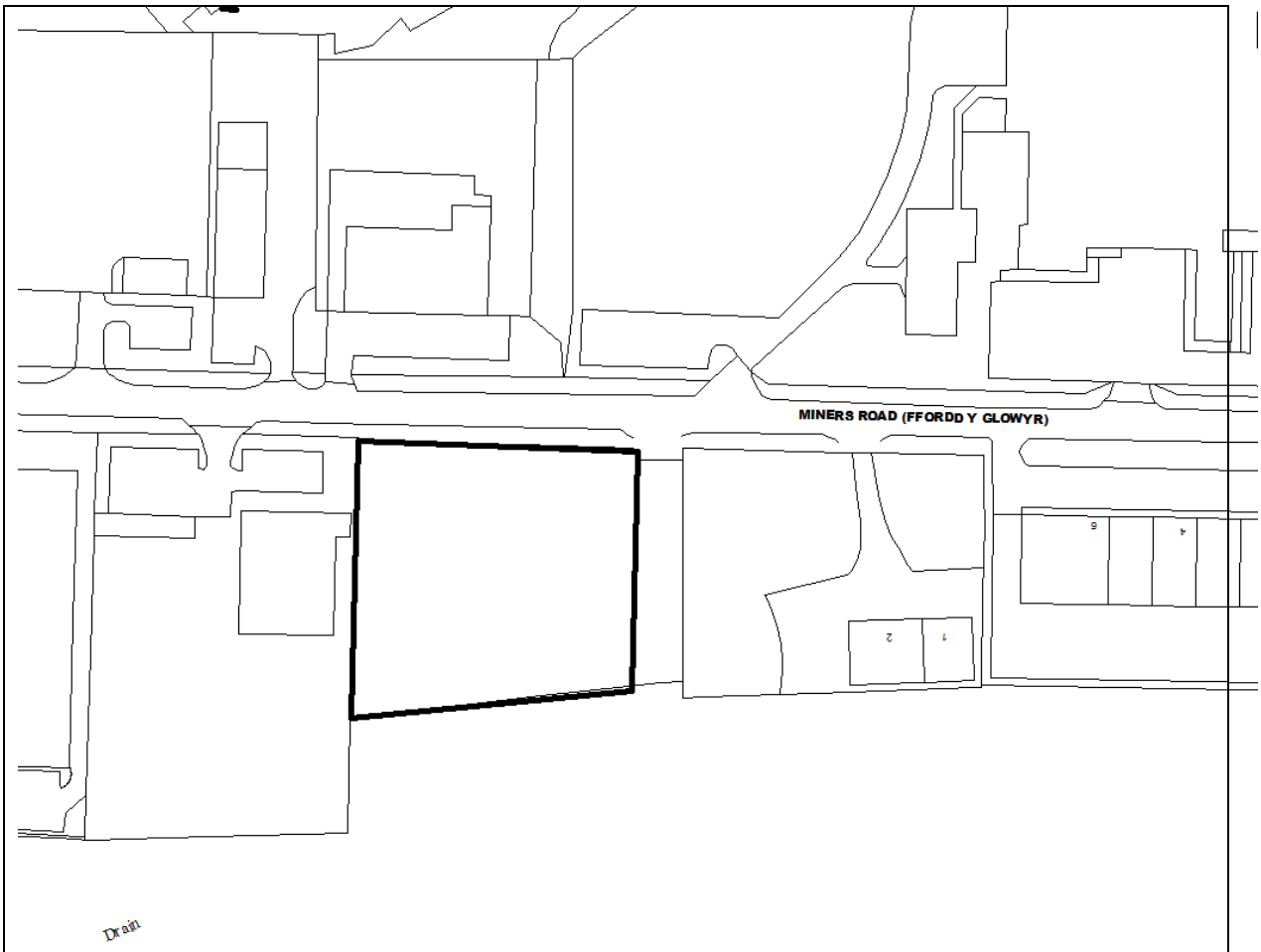
Site	E1.37 Rhosduu Industrial Estate, Wrexham town
Owner	Toolpak
Agent	-
Size, ha	0.90 (1.7 originally, 0.8 developed).
Market Availability	Not Available (Held as Expansion Land)
Planning Status	UDP Employment Allocation (Ref. 37)
Proposal	-
Constraints	Trees onsite Railway line adjacent
Comments	Expansion land for Toolpak Some land in the south is in use for open storage by that company Is presently within the secure curtilage of Toolpak but could be developed separately with a distinct access provided from the main industrial estate road
Planning Issues	-
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area

	Heavy/Specialist Industrial Site Warehouse/Distribution Park Site for Specific Occupiers
Serviced	No
Availability, years	5+

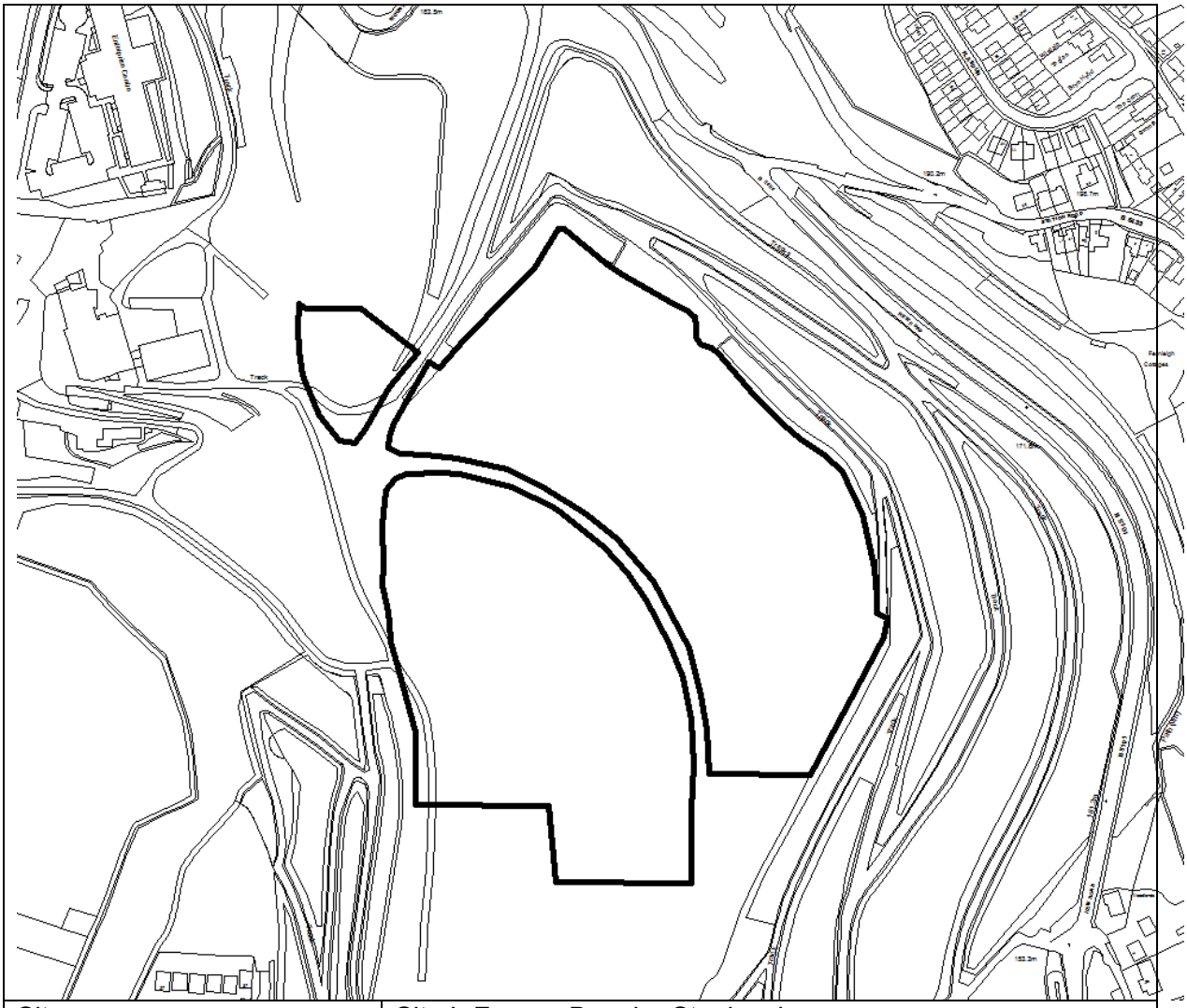
Site	E1.39 Ruthin Road Development Area (Western Gateway), Wrexham town
Owner	Wrexham County Borough Council
Agent	-
Size, ha	8.80 (originally 15.2, but reduced to 8.8 as a result of planning permission)
Market Availability	Available
Planning Status	UDP Employment Allocation (Ref. 39) Received outline planning consent for a mixed use development (App. Ref. P/2003/1285) comprising - a high quality employment park, housing, primary school, open space and infrastructure. Various subsequent applications of which the latest (App. Ref. P/2012/0059) extends the period stipulated for submission of a reserved matters application for a further five years (to 2017)
Proposal	Application P/2012/0059 clarifies the total site area to be 23.62 ha, of which 8.83 ha is designated as employment development land and 6.42 ha is proposed for housing. A further 8.13 ha will be set aside for ecological mitigation, providing a new wildlife and recreation corridor with links to Wrexham Town Centre

	Various infrastructure changes are proposed including realignments and a new roundabout for the A525 (towards its junction with the A483) and associated access and spine roads Additional footpaths/cycleways to be provided, linking Wrexham Technology Park and the Hospital
Constraints	Trees onsite Various public footpaths pass through the site River Gwenfro pass through the site Various ecological issues, to be addressed through the provision of ecological mitigation land.
Comments	Wrexham Gateway will form a third phase of Wrexham Technology Park Croesnewydd Road Highway Improvement Scheme was completed in spring 2013 A proposed development of 4.05 ha has effectively now been secured on the employment land and is the subject of submitted planning applications for both the required access road and the development which will provide 8,166 sqm of new Grade A accommodation for a single end user. This will be completed and occupied by Spring 2016. Following the development identified above only 4.75 ha of developable employment land will remain. However, this cannot currently be developed until major improvements are made to the adjoining A483 junction. Demand exists for the remaining employment land and WCBC Economic Development officers have recorded three strong enquiries for land here over 2014. Each was seeking to carry out their own developments respectively for 600, 1,000 and 1,500 sqm of accommodation. The Council will proceed with development of the spine road through the site and other associated infrastructure works.
Planning Issues	Employment land protected for high quality uses in the UDP (Policy E2) Walking/cycling route to the north (Policy T10)
Likely development potential	Office
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park Site for Specific Occupiers
Serviced	No
Availability, years	1-3

Land Elsewhere in Wrexham – Other Development Land



Site	Site K Llay Industrial Estate (H)
Owner	P. R. Pugh Haulage
Agent	-
Size, ha	0.80
Market Availability	Not Available (In Use)
Planning Status	Not allocated in the UDP, but within the Employment Area boundary and considered suitable for B1/B2/B8 development (Site. Ref. K)
Proposal	-
Constraints	-
Comments	Site in active use for lorry parking by P. R. Pugh Haulage Contractors No plans for development here
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	5+

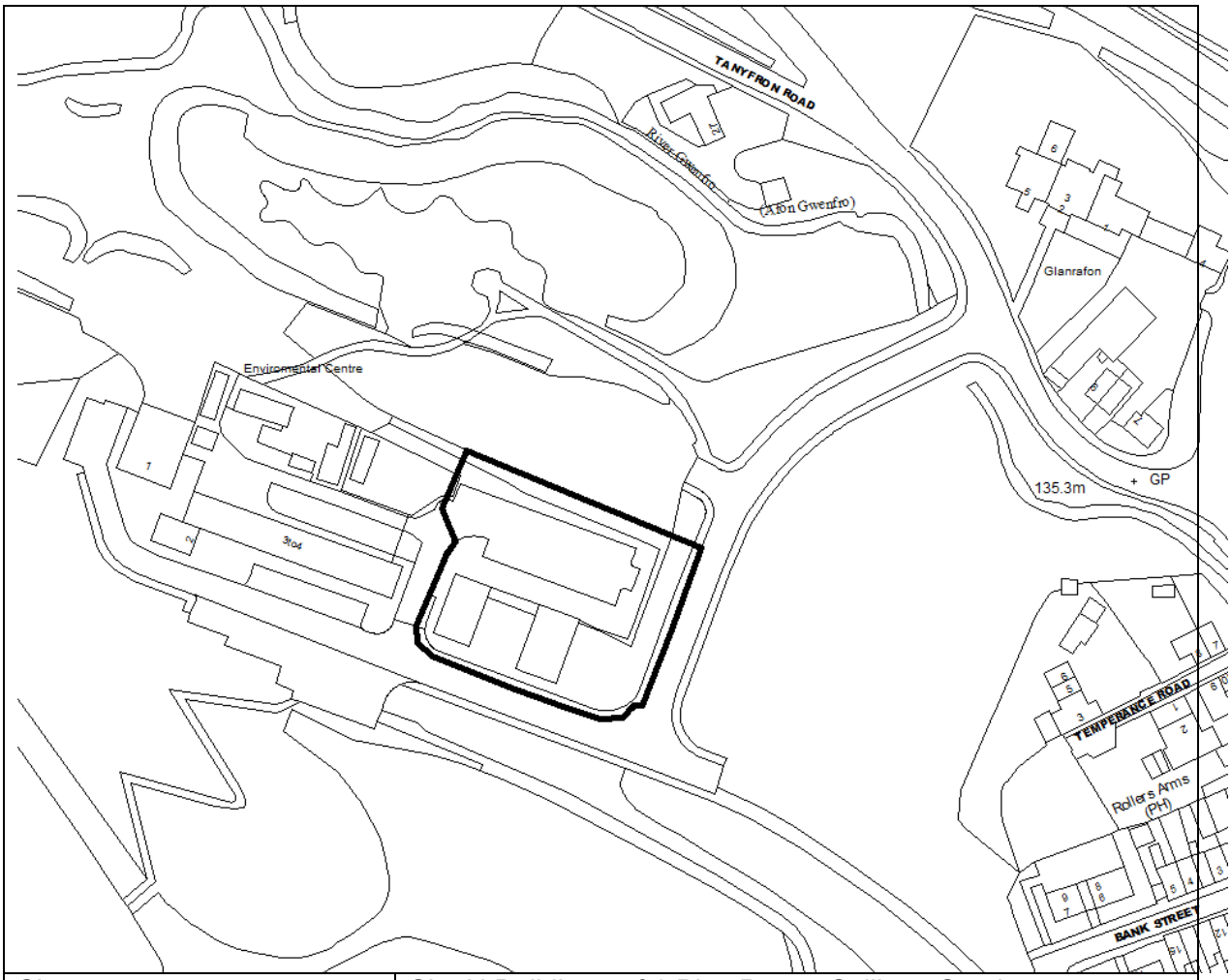


Site	Site L Former Brymbo Steelworks
Owner	Emror (formerly Brymbo Developments)
Agent	Parkhill Estates
Size, ha	8.00
Market Availability	Available
Planning Status	Not allocated in the UDP, but has past consents for B1/B2/B8 development. Historic outline consent (App. Ref. CB00016 granted in November 1997) for a mixed use scheme, for retail, B Class employment and leisure uses. Further consents for B1(c) light industrial units (App. Ref. P/2005/1484) and commercial development (P/2005/1489). Four extensions to the period within which reserved matters applications can be submitted (2000, 2003, 2006 and 2009) where then sought. The most recent consent, granted in March 2014 (App. Ref. P/2014/0166) was reserved matters approval for a spine road to access the site and to further extend the time in which reserved matters consent can be sought to March 2017.
Proposal	Housing development in the south now complete. Outstanding development includes 8 ha of B-Class employment and a 1.5 ha primary school. Access in place

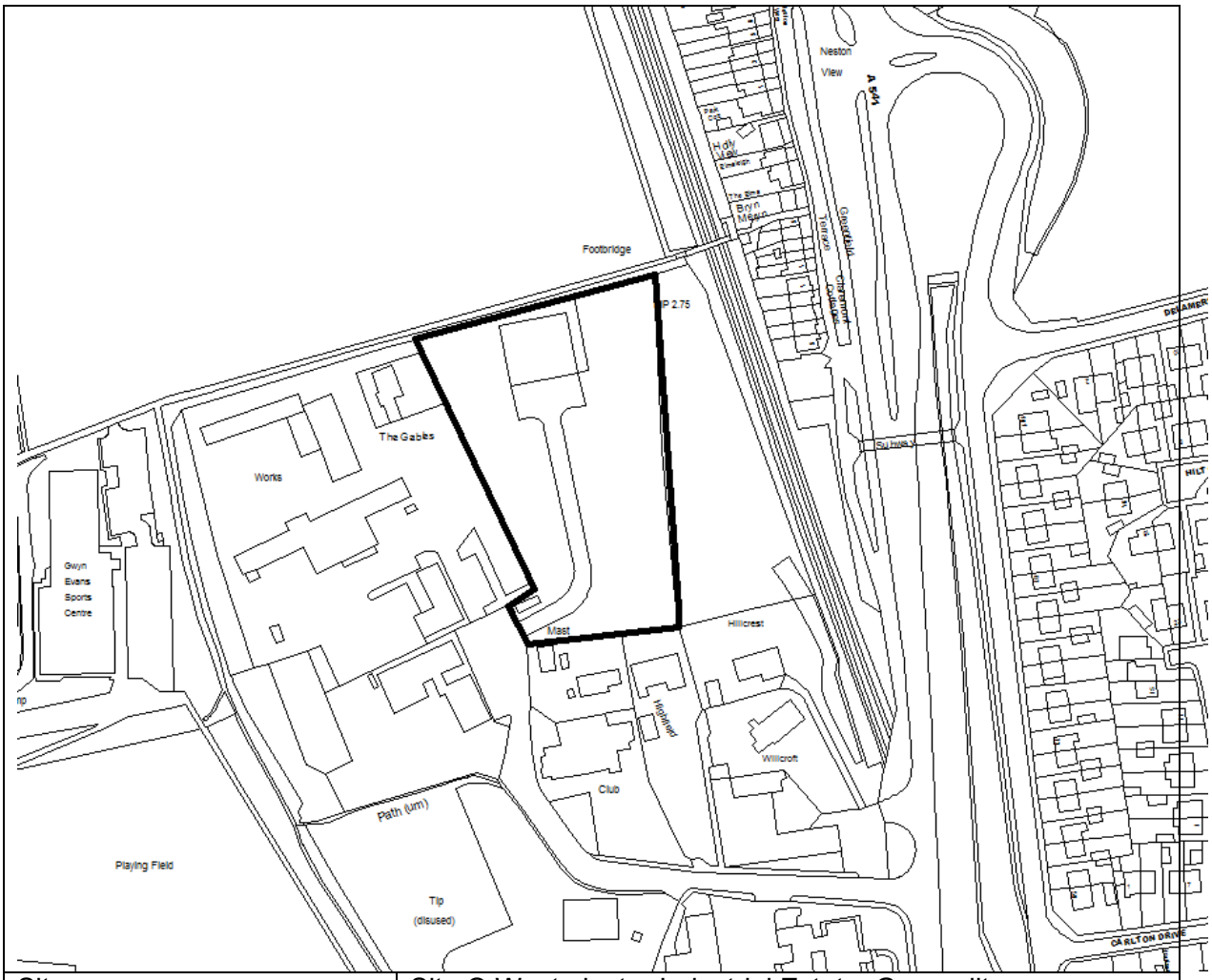
Constraints	Reclaimed site Plateau site, with steeply sloping sites
Comments	Although the owner has retained a long term commitment to this site, they have also continued to defer the B1/B2/B8 development in favour of residential options. Not clear if this aspect of the development will ever be delivered by the current owners.
Planning Issues	Land Reclamation Area (Policy EC10) Green Barrier (Policy EC1) to the east
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park General Business/Industrial Area
Serviced	No
Availability, years	5+

Site	Site M Ruabon Business Park, Adjacent A483
Owner	Wynnstay Farming Company Ltd
Agent	Forsters
Size, ha	23.00
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	Not allocated in the UDP, but has outstanding consents for B1/B2/B8 development Reserved matters planning permission (App. Ref. P/2003/1484) for a 49,749 sqm B1 Business Park – High Technology, Manufacturing, Research And Development Of Prestige Offices Also has a Certificate of Lawful Development (Ref. P/2010/0847) for the provision of a site access road, associated with the above consent, secured at appeal (Appeal Ref. APP/H6955/X/11/2160288) in June 2012
Proposal	Owner now seeking outline consent (App. Ref. P/2014/0021) for a mixed-use development comprising: • 300 houses – including 16 social rented and 14 intermediate homes • 1,858 sqm of A1food retail and a Petrol Filling Station • 12, 960 sqm of B1(c) light industrial • 4,646 sqm of B8 storage and distribution

	• A 2,787 sqm 2/3 storey hotel and pub/restaurant • 6.08 ha of public open space, retaining an existing pond Also 0.73 ha land reserved for a primary school and access off the A539 and B5605. Further potential for a 0.61 ha Extra Care facility. Total B-Class employment delivered by this application would be 17,606 sqm on 3.42 ha.
Constraints	Various ecology issues – including breeding birds Footpaths cross the site Woodland onsite Pond in centre of site (to be retained in current proposal)
Comments	Current proposal will only provide a third as much B-Class employment as the previous consented outline proposal
Planning Issues	Greenfield site bounded by Green Barrier (Policy EC1) and Special Landscape Area (Policy EC5) land. Walking/cycling route passes through the site (Policy T10)
Likely development potential	Office/industrial
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park General Business/Industrial Area Warehouse/Distribution Park
Serviced	No
Availability, years	3-5

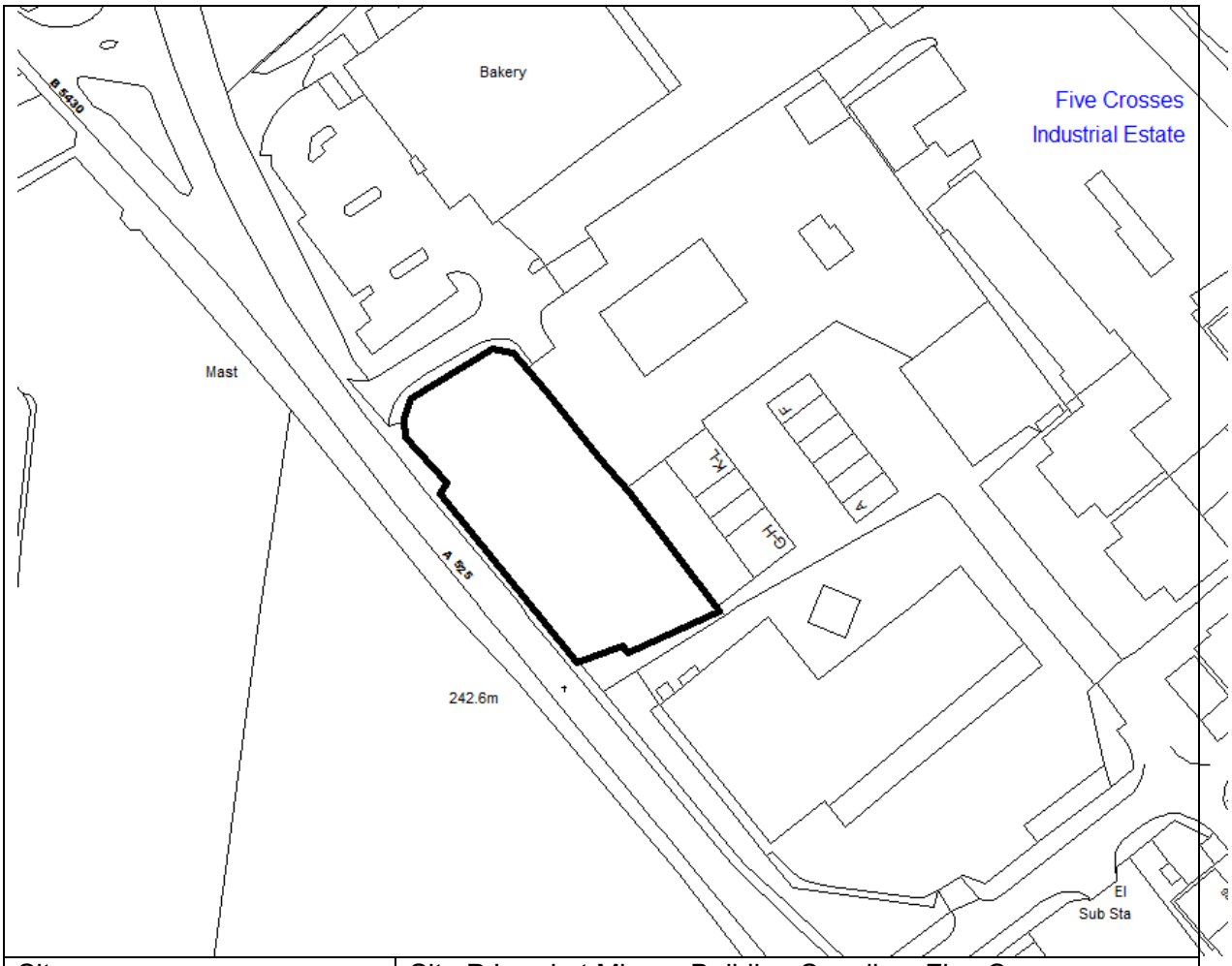


Site	Site N Buildings 5&6 Plas Power Colliery, Southsea
Owner	Read Construction Holdings
Agent	-
Size, ha	0.31
Market Availability	Available
Planning Status	-
Proposal	Planning permission (App. Ref. P/2007/0931) for the change of use of buildings and land to office use including link building extension and associated works has now lapsed
Constraints	Vacant buildings on site benefit from listed building status and curtilage listed status Potential of contamination requiring ground investigation Trees on site
Comments	Any future development will need to retain the existing listed buildings on site
Planning Issues	Adjacent to area of Land Reclamation to the south (Policy EC16)
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area
Serviced	No
Availability, years	5+

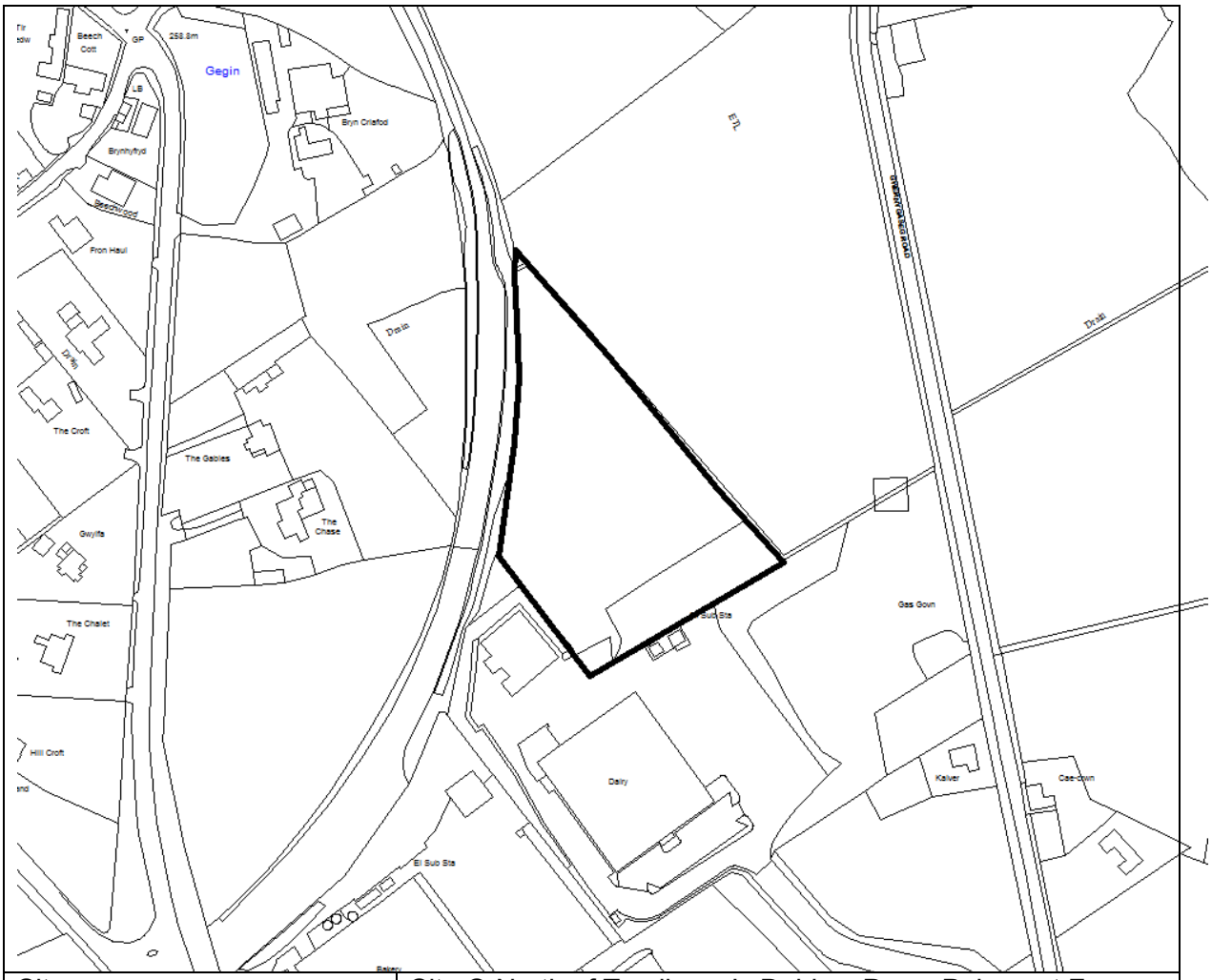


Site	Site O Westminster Industrial Estate, Gwersyllt
Owner	Whitley Brothers
Agent	-
Size, ha	0.82
Market Availability	Not Available (Held as Expansion Land)
Planning Status	-
Proposal	Planning permission for ready mixed concrete plant (App. Ref. P/2008/0103) by D P Williams Holdings has now lapsed.
Constraints	-
Comments	Hardstanding area with previous permissions for concrete batching plants and the manufacture of concrete products by D P Williams Holdings. Land likely to be held to meet the needs of this company only.
Planning Issues	Being considered as a potential UCS housing site for inclusion in the LDP.
Likely development potential	General Business/Industrial Area Site for Specific Occupier
Potential guidance market segment uses	General Business/Industrial Area
Serviced	No

Availability, years	3-5



Site	Site P Land at Minera Building Supplies, Five Crosses Industrial Estate, Minera
Owner	Minera Building Supplies Ltd
Agent	McDyre & Co
Size, ha	0.28
Market Availability	Available
Planning Status	Full planning permission (App. Ref. P/2011/0339) for three multi-let buildings of B1/B2/B8 employment use
Proposal	Proposed for three buildings containing 11 two-storey Class B1/B2/B8 office and workshop units with associated access, parking and landscaping
Constraints	-
Comments	-
Planning Issues	Green Barrier to the south and west (Policy EC1)
Likely development potential	Industrial/office
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area
Serviced	No
Availability, years	1-3



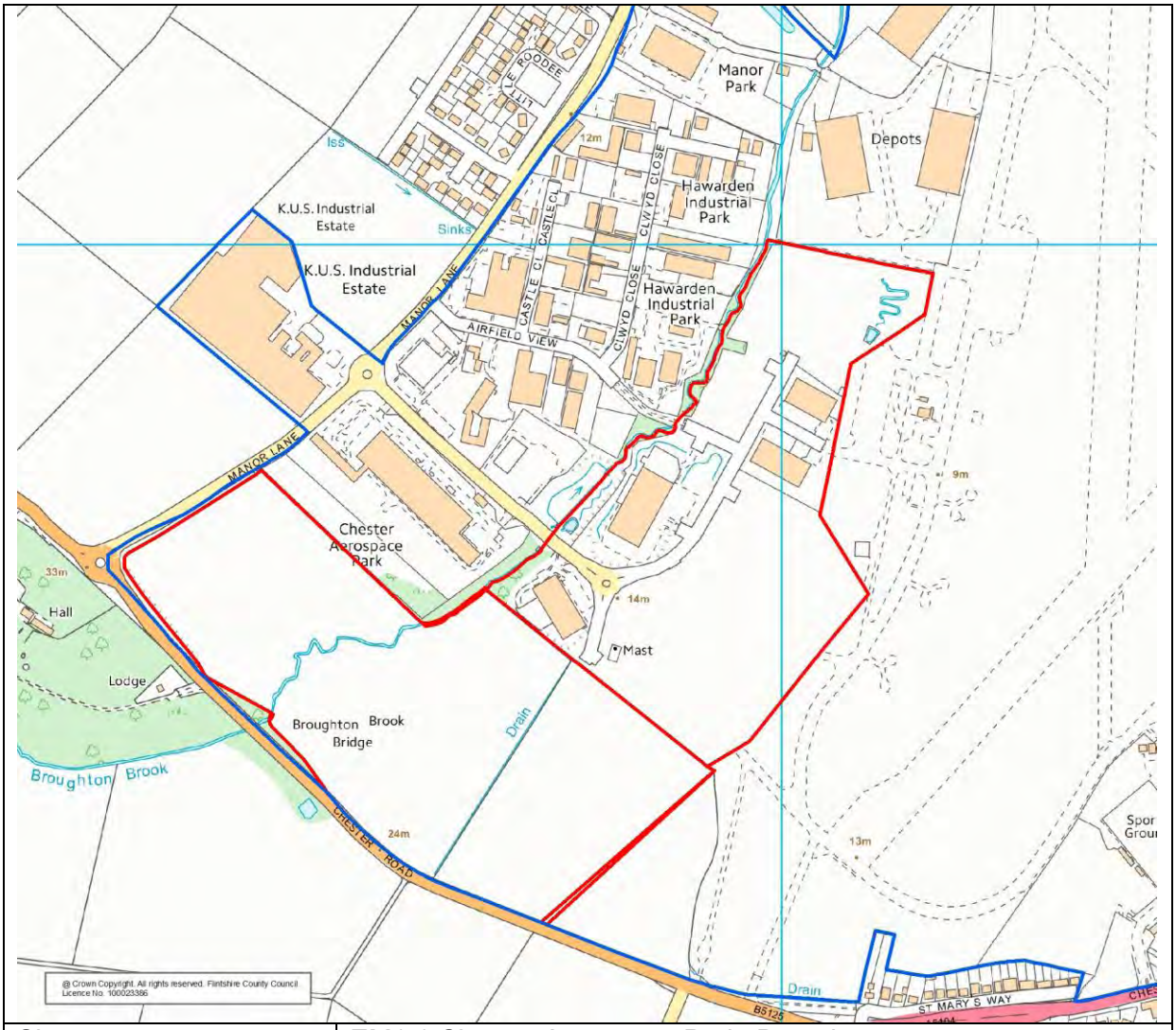
Site	Site Q North of Tomlinson's Dairies, Pen y Palamant Farm, Minera
Owner	Tomlinson's Dairies
Agent	Haston Reynolds
Size, ha	0.95
Market Availability	Not Available (Held as Expansion Land)
Planning Status	Full planning permission (App. Ref. P/2012/0112) for the construction of a building for bottling and storage of milk.
Proposal	Proposed for a 643 sqm bottle store for the use of the dairy with an area of hardstanding and earthworks on the remainder of the 0.9 ha site.
Constraints	Ecological issues mitigated through consented application
Comments	Greenfield land to the north is also owned by Tomlinson's Dairies and will generally be held to meet the expansion needs of this company only.
Planning Issues	Bounded to the north west by a Walking/Cycling Route (Policy T10) and a Green Barrier (Policy EC1)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier
Serviced	No

Availability, years	1-3

APPENDIX 5 – FLINTSHIRE SITE PROFORMAS

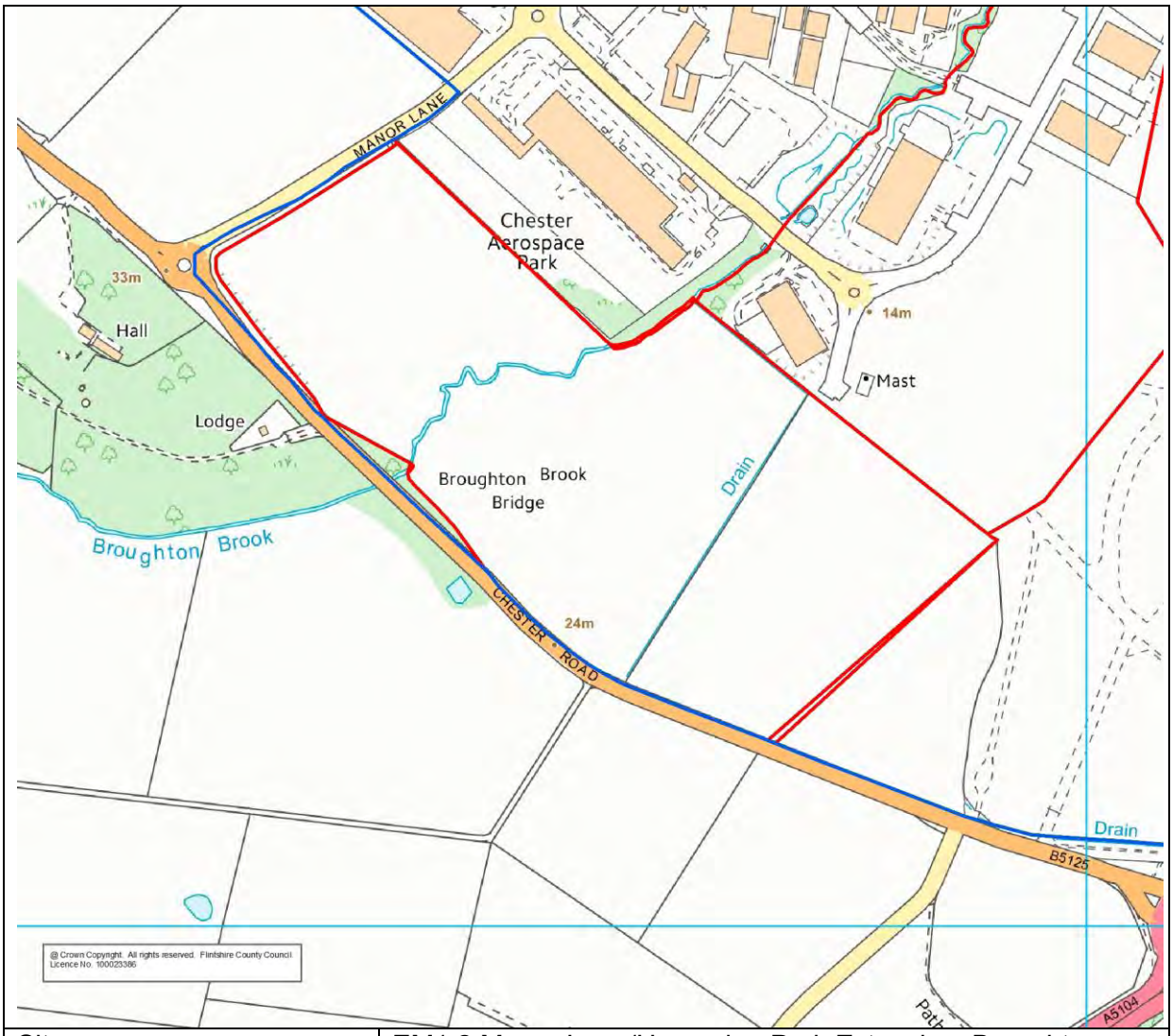
The employment land site proformas relate to undeveloped land (or a significant redevelopment opportunity) which are allocated for employment in the Unitary Development Plan (Policies EM1 and EM2) or have existing planning consents for B1/B2/B8 uses. These proformas are linked to the analysis in Section 6.0 of the main Joint Employment Land Review document.

The employment land site proformas are different to the Employment Area Assessments included at Appendix 9, in that the latter refers to existing development and buildings in the Counties Principal Employment Areas (as defined under Policy EM3 of the UDP). However, it should be noted that an employment site can be included within an Employment Area, for example EM1.12 Land to North West of Garden City, Deeside is within the wider Deeside Employment Area as set out under Policy EM3.



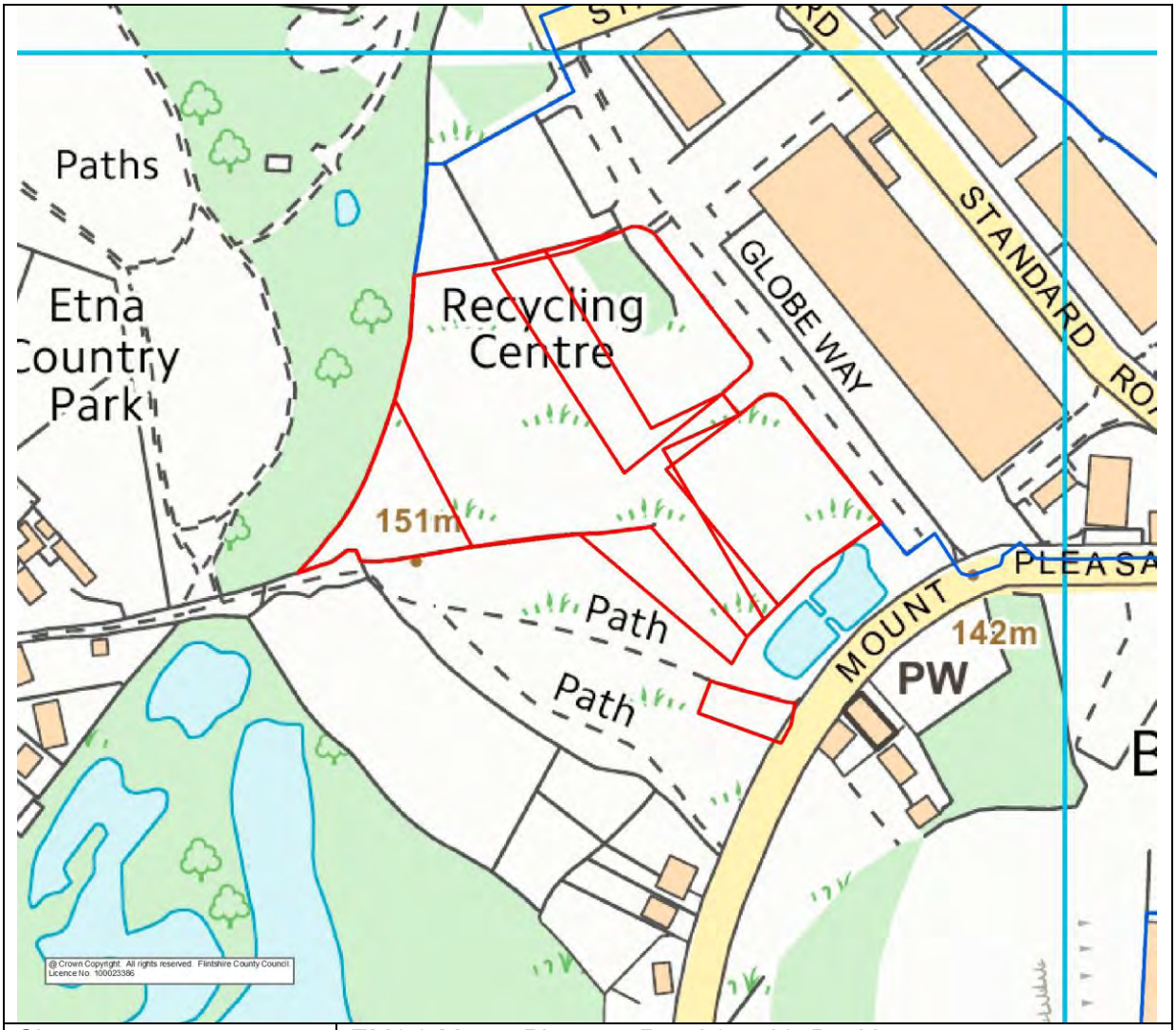
Site	EM1.1 Chester Aerospace Park, Broughton
Owner	Welsh Government/Pochin
Agent	Legat Owen/King Sturge/JLL
Size, ha	9.00
Market Availability	Partly Available – marketed as Hawarden Business Park
Planning Status	EM1 General Employment Land Allocation (Ref. No. 1) Planning consent for up to 42,000 sqm of B1/B2/B8 accommodation.
Proposal	A portion of the site is now being developed for a 2,500 sqm industrial facility for SIRA Test and Certification. Land is being developed through a partnership between UK Land and Property, Pochin in conjunction with Welsh Government. Development should be complete by late 2014.
Constraints	Airbus runway and related facilities adjacent. Development will require consultation with Airbus.
Comments	Identified by Airbus as a preferred site for provision of a supplier park. The masterplan development can accommodate individual buildings of up to 23,223 sqm.

	Several buildings have already been completed on the site, and they are excluded from the site area. Site divided into six development plots of which three remain available. These range from 1,858 sqm up to 13,935 sqm. Pochin report that they have a number of parties potentially interested in these plots.
Planning Issues	Site is within Development Zone and Principal Employment Area (Policy EM3). Minerals safeguarding area to the west (Policy MIN8).
Likely development potential	Industrial
Potential guidance market segment uses	High Quality Business Park Research and Technology/Science Park General Business/Industrial Area Heavy/Specialist Industrial Site Sites for Specific Occupier
Serviced	Yes
Availability, years	1-3



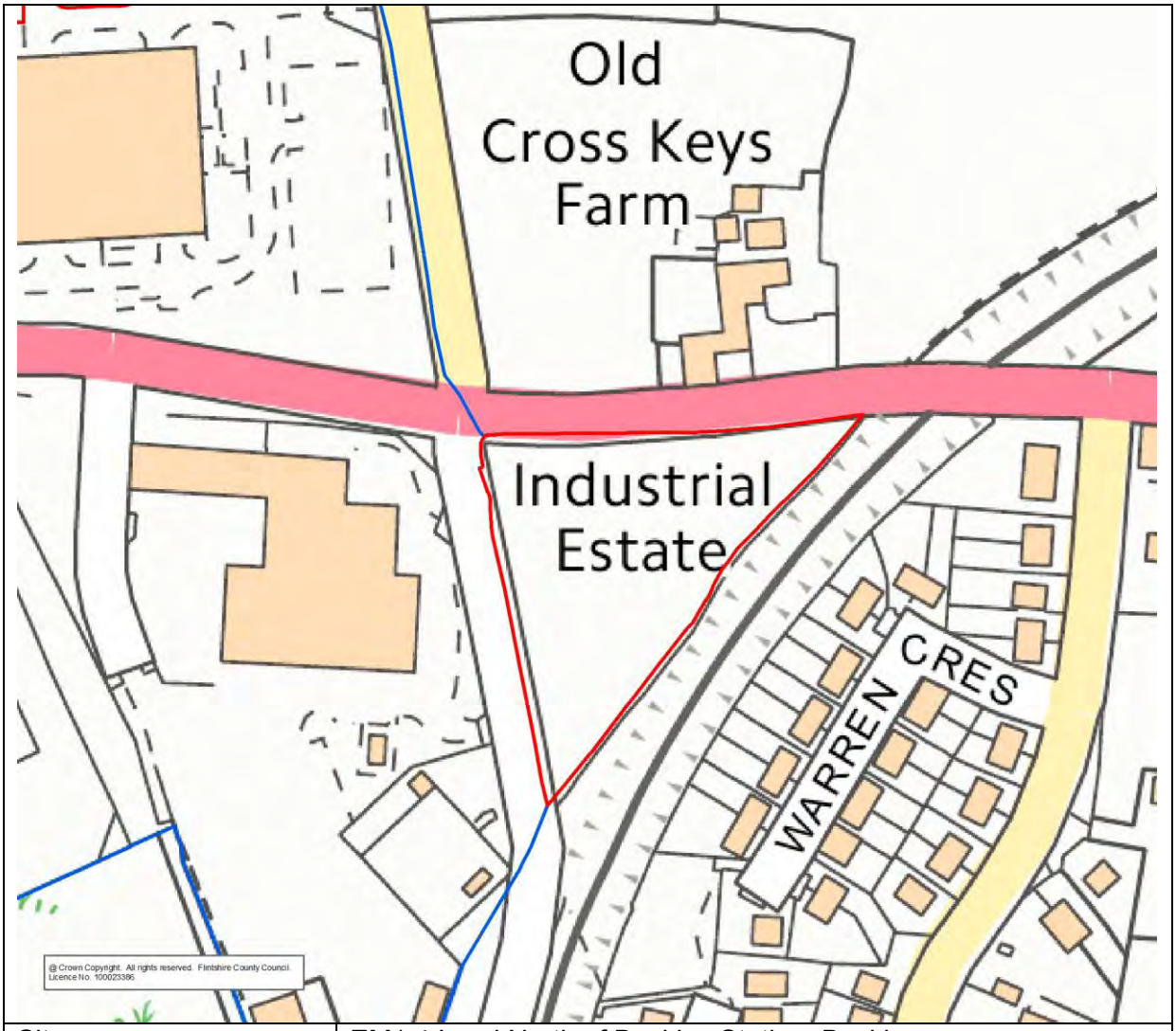
Site	EM1.2 Manor Lane/Hawarden Park Extension, Broughton
Owner	Welsh Government/Gladstone Estates
Agent	Legat Owen/King Sturge/JLL
Size, ha	18.20
Market Availability	On the Market
Planning Status	EM1 General Employment Land Allocation (Ref. No. 2) Outline consent for extension to existing business park for employment purposes (App. Ref. 050673)
Proposal	7,800 sqm office park (Class B1) on the western site and 22,100 sqm of B2/B8 development on the eastern site served by two separate access points.
Constraints	Site is bisected by Broughton Brook creating a natural division between the eastern and western parts. Flight path limitations for Hawarden Airport serve to render the easternmost parts of the site undevelopable. Possible habitat issues on Chester Road frontage. Potential constraints on electricity supply.
Comments	Identified by Airbus as a preferred site for provision of a supplier park.

	Marketed as expansion site for Hawarden Business Park.
Planning Issues	Site is within Development Zone and Principal Employment Area (Policy EM3). Minerals safeguarding area runs through the centre of the site (Policy MIN8).
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park Research and Technology/Science Park General Business/Industrial Area Heavy/Specialist Industrial Site Incubator/SME Cluster Site Sites for Specific Occupier
Serviced	No
Availability, years	3-5

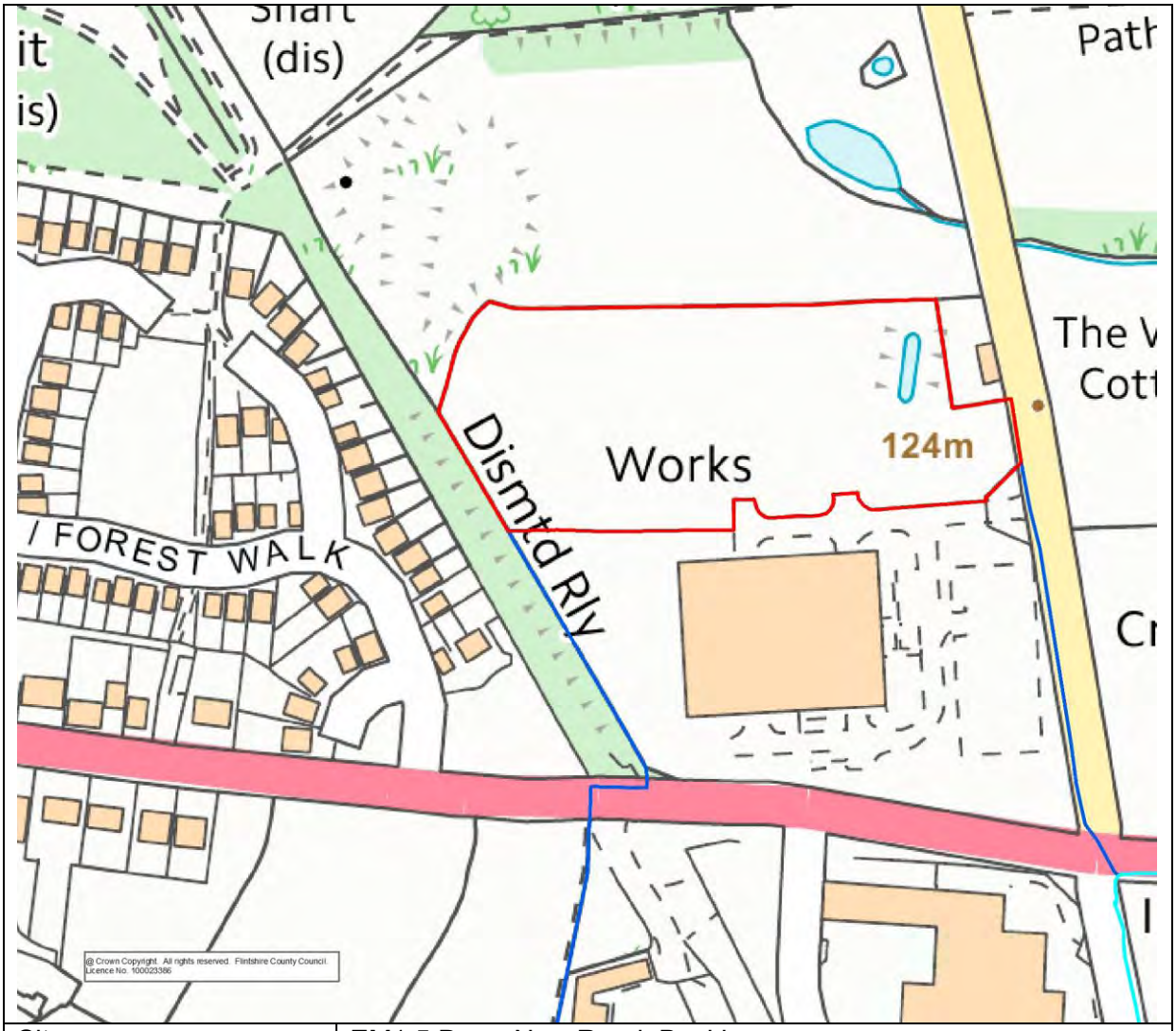


Site	EM1.3 Mount Pleasant Road (north), Buckley
Owner	Blackrock Development Ltd
Agent	Legat Owen
Size, ha	2.00
Market Availability	Partly Available – marketed as Globe Business Park
Planning Status	EM1 General Employment Land Allocation (Ref. No. 3) Full planning consent for warehouse and manufacturing units (App. Ref. 48990 and 049270)
Proposal	North western part of site developed as premises for Lester Fabrication & Cladding Co. (App. Ref. 049138) North eastern part of the site developed as premises for William Taylor Stonemasons (App. Ref. 048989) Southern part of site under construction (may now be complete) for two industrial units totalling 916 sqm (App. Ref. 48990 and 049270).
Constraints	-
Comments	Southern units are on the market for sale at £710/sqm.
Planning Issues	Previously an Area of Search for New Waste Management Facilities (Policy EWP6)

Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area
Serviced	Yes
Availability, years	0-1

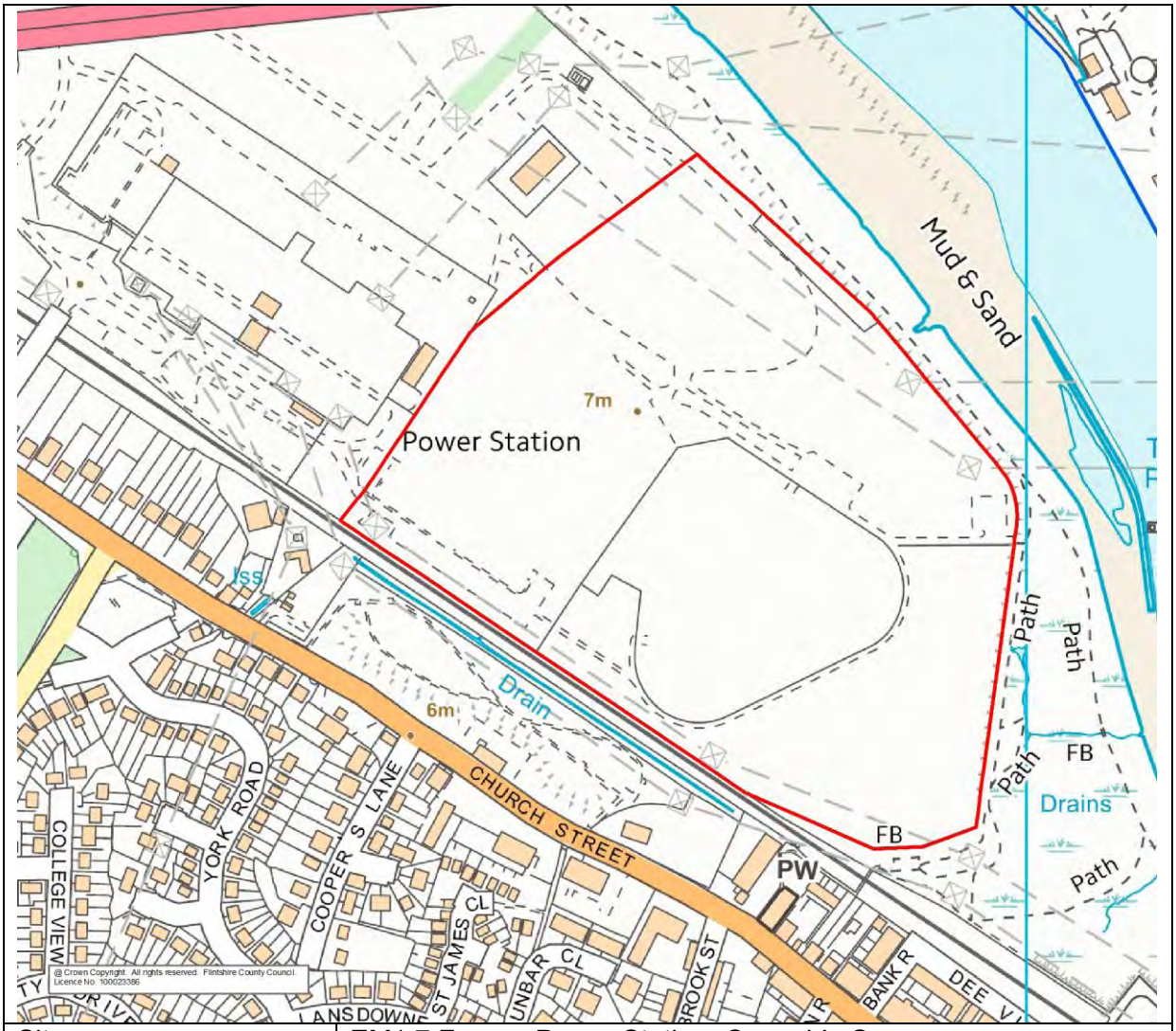


Site	EM1.4 Land North of Buckley Station, Buckley
Owner	Buckley Foods
Agent	-
Size, ha	0.60
Market Availability	Not Available (Held as Expansion Land)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 4)
Proposal	-
Constraints	Adjacent to railway line Bounded by trees
Comments	Held as expansion land for Buckley Foods
Planning Issues	Site is within Principal Employment Area (Policy EM3).
Likely development potential	Industrial/office
Potential guidance market segment uses	General Business/Industrial Area
Serviced	No
Availability, years	5+



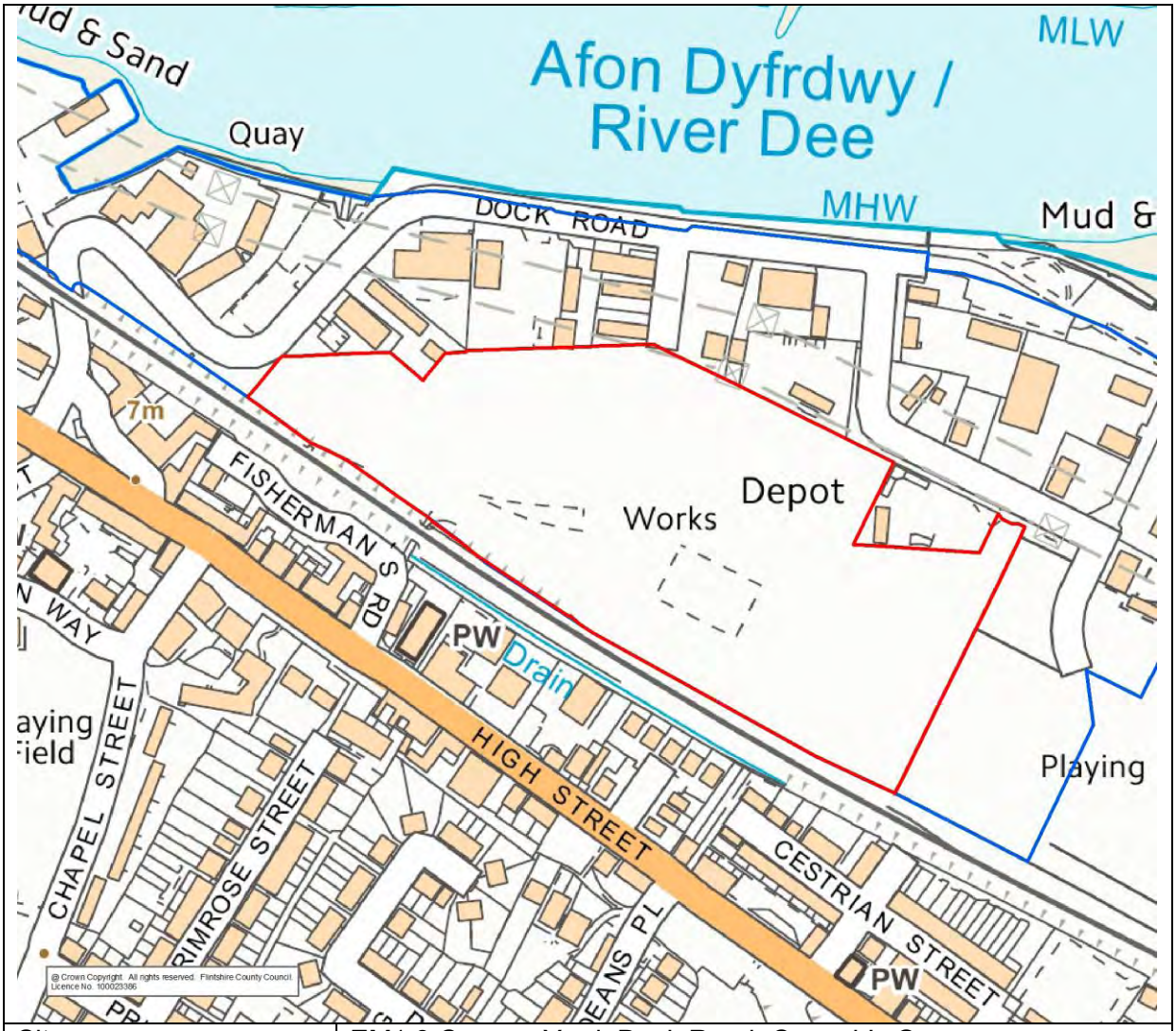
Site	EM1.5 Drury New Road, Buckley
Owner	F.G. Whitley & Sons Co
Agent	Legat Owen
Size, ha	1.40
Market Availability	Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 5)
Proposal	-
Constraints	Trees onsite
Comments	Expansion land associated with the 4,236 sqm manufacturing unit to the south (former Optec/Airbus facility). Both the unit and the land have now been let to Glen Dimplex Professional Appliances, for the supply of refrigeration units for hospitals, pharmacies and laboratories amongst others. It is possible that Glen Dimplex will wish to develop the additional land for further facilities. Both sites share common access arrangements at present, but could be divided to provide separate development opportunities.
Planning Issues	Site of International Importance (Policy WB2) and Statutory Site

	of National Importance (Policy WB3) to the north.
Likely development potential	Office/Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier Established/Potential Office Location
Serviced	No
Availability, years	1-3



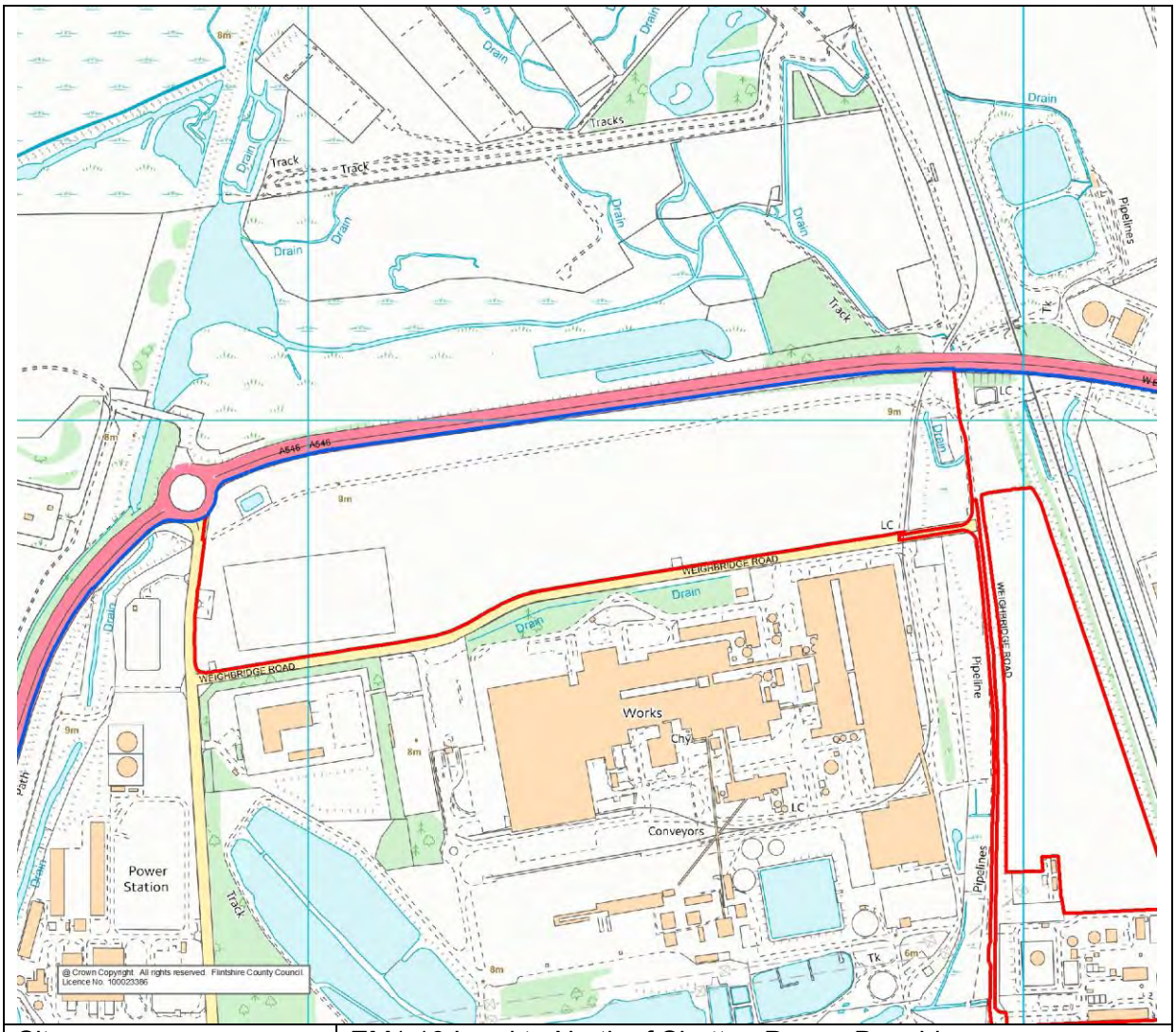
Site	EM1.7 Former Power Station, Connah's Quay
Owner	E.ON UK, FCC & Network Rail
Agent	-
Size, ha	12.80
Market Availability	Not Available (Held as Expansion Land)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 7)
Proposal	Proposed as a waste transfer station however, planning permission for this was refused.
Constraints	In flood risk area Remains of various cleared buildings and roadways on the site. Electricity pylons cross edge of site Railway line adjacent
Comments	Land is to the rear of the existing power station facilities bounded by the River Dee to the north and railway line to the south. Cannot be developed separately from the power station and is assumed will be retained for associated uses.
Planning Issues	Identified as an Area of Search for New Waste Management Facilities (Policy EWP6)

	Site of International Importance (Policy WB2) and Statutory Site of National Importance (Policy WB3) to the north.
Likely development potential	Industrial
Potential guidance market segment uses	Heavy/Specialist Industrial Site Site for Specific Occupier Recycling/Environmental Industries Site
Serviced	No
Availability, years	5+



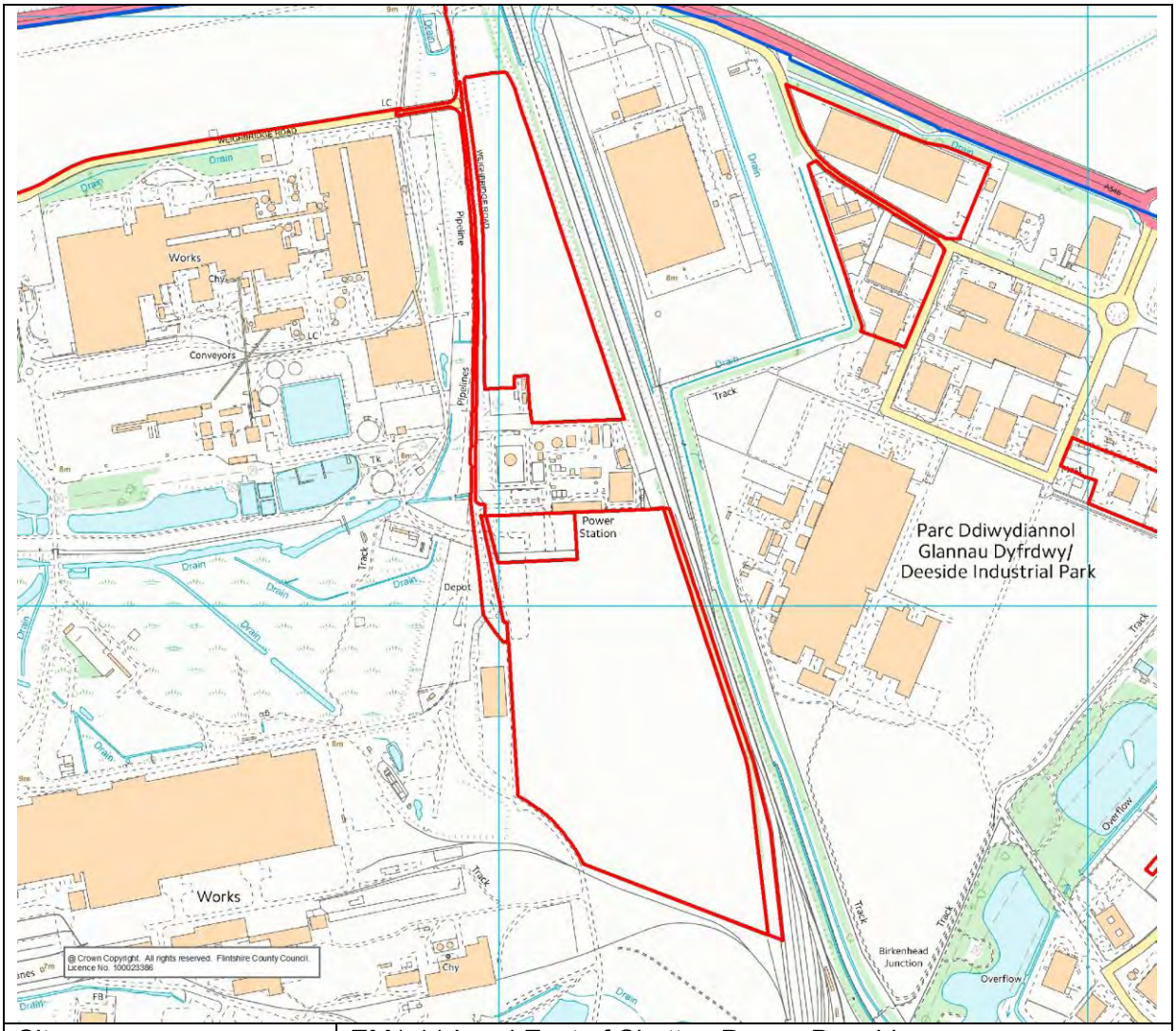
Site	EM1.8 Crumps Yard, Dock Road, Connah's Quay
Owner	Flintshire County Council
Agent	-
Size, ha	3.45
Market Availability	Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 8)
Proposal	Confidential proposal on site
Constraints	Access via low bridge Remains of buildings on site Trees onsite
Comments	Former rail marshalling yard Land has been reclaimed Previous interest from Connah's Quay Watermen for heritage facility
Planning Issues	Identified as an Area of Search for New Waste Management Facilities (Policy EWP6)
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupier Recycling/Environmental Industries Site
Serviced	No
Availability, years	1-3



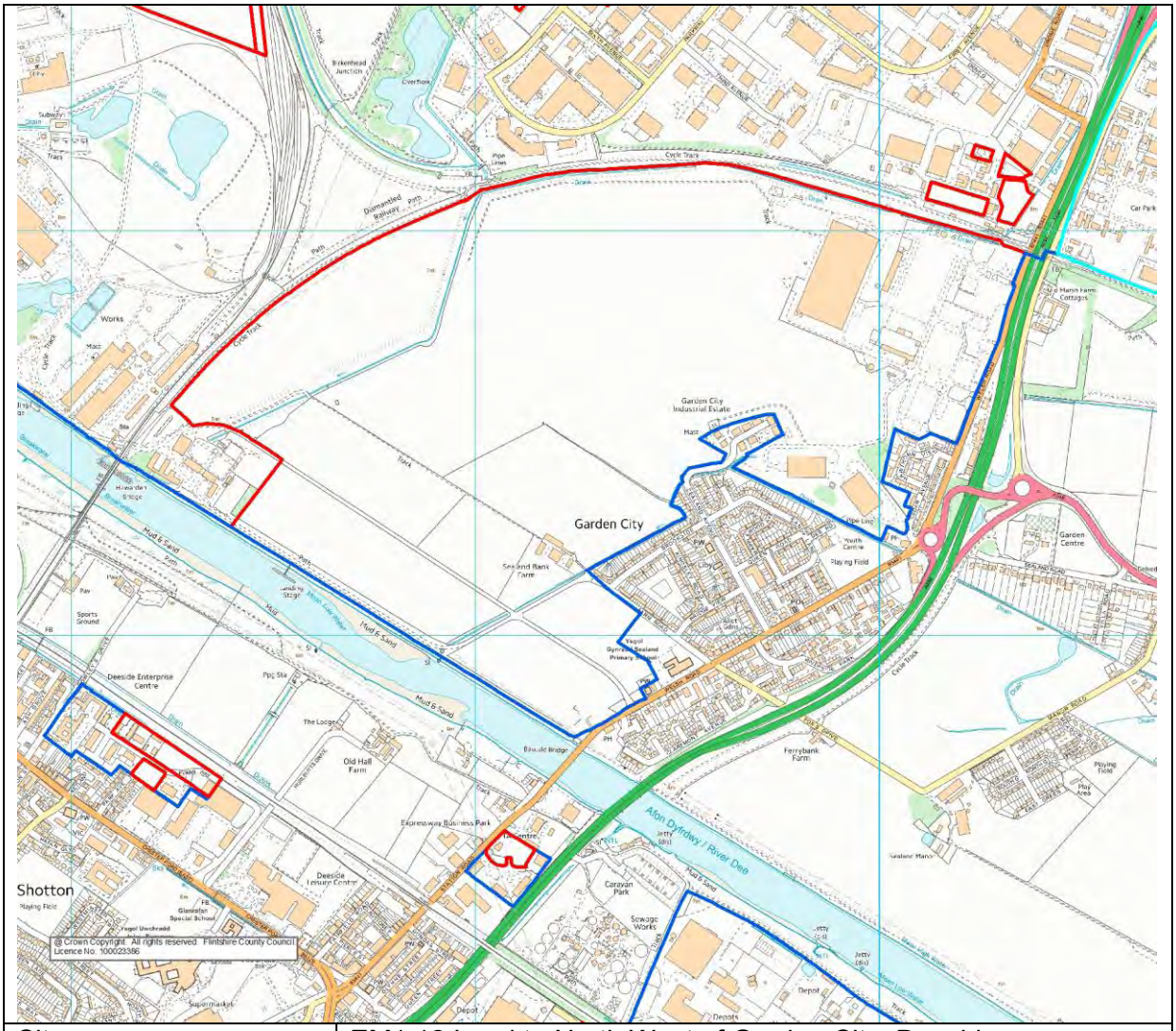
Site	EM1.10 Land to North of Shotton Paper, Deeside
Owner	UPM Shotton
Agent	-
Size, ha	24.00
Market Availability	Not Available (Held as Expansion Land)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 10)
Proposal	Previously proposed for laboratory facilities
Constraints	Pond on site
Comments	Held as expansion land for UPM Shotton Within Deeside Enterprise Zone
Planning Issues	Identified as Development Zone (Policy EM3) and within Minerals Safeguarding Area (Policy MIN8)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site

	Site for Specific Occupier Recycling/Environmental Industries Site
Serviced	No
Availability, years	3-5



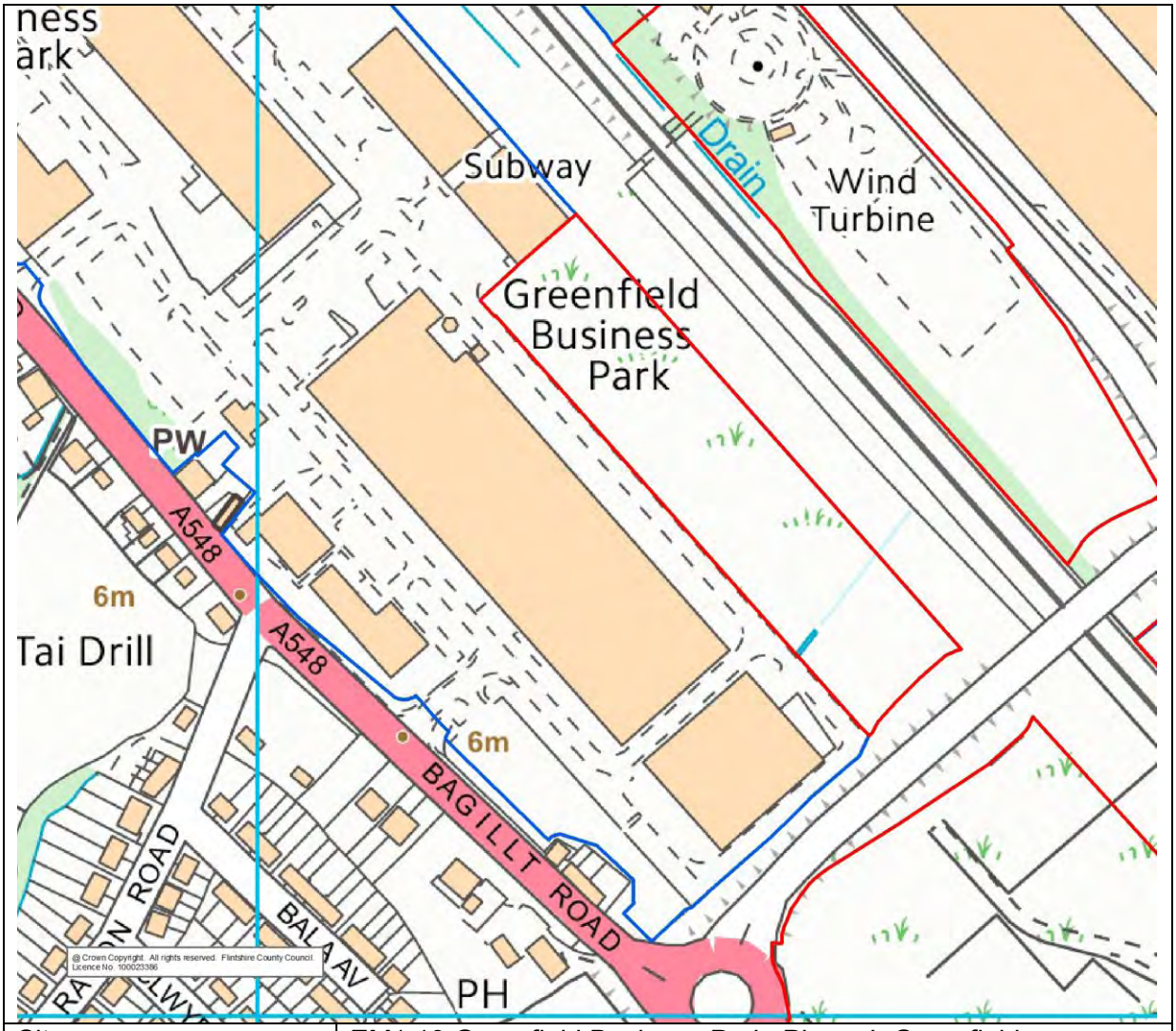
Site	EM1.11 Land East of Shotton Paper, Deeside
Owner	Flintshire County Council
Agent	-
Size, ha	32.00
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 11) Southern site has full permission for the development of a convertor station (App. Ref. 50340)
Proposal	Northern site identified for a Deeside Energy Recovery Facility (energy from waste) and has permission for an Energy Recovery Facility (App. Ref. 52626) Southern site developed for convertor station comprising valve halls, a control building and a spares building together with outdoor electrical equipment and associated access improvements, infrastructure, earthworks, security fencing, landscaped areas and habitat creation (App. Ref.: 50340)
Constraints	-
Comments	-

Planning Issues	Identified as Development Zone (Policy EM3) and within Minerals Safeguarding Area (Policy MIN8) Southern site is identified as an Area of Search for New Waste Management Facilities (Policy EWP6)
Likely development potential	Industrial
Potential guidance market segment uses	Heavy/Specialist Industrial Site Site for Specific Occupier Recycling/Environmental Industries Site
Serviced	South – Yes North – No
Availability, years	1-3



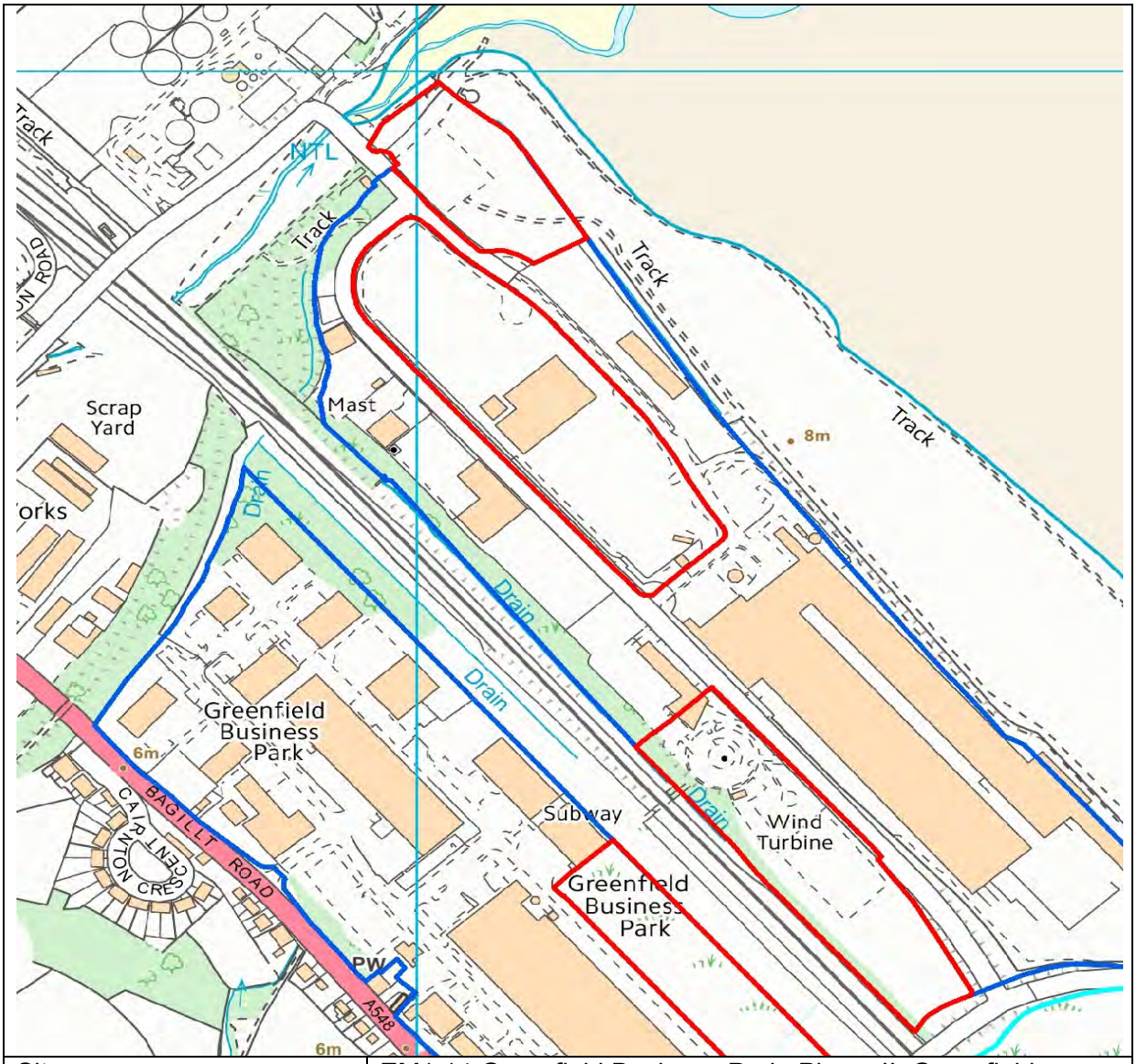
Site	EM1.12 Land to North West of Garden City, Deeside
Owner	Pochin/Praxis
Agent	-
Size, ha	98.00
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 12) Outline permission for a mixed use development (App. Ref. 050125)
Proposal	Proposed for : • Industrial and Logistics Park (B2, B8) – approximately 120,000 sqm • Residential - 600 dwellings (or more) • Offices (B1a) – approximately 3,300 sqm • Light Industrial (B1c) – approximately 7,400 sqm • Hotel (C1) – approximately 3,000 sqm • Skills and Training Centre (C2, D1) – approximately 4,000 sqm • Local Retail Centre (A1) – approximately 2,500 sqm • Green infrastructure, including approximately 21.9 ha

	parkland and landscaping/buffer and drainage areas • Main vehicular access from Welsh Road and a secondary access for the residential area from Farm Road
Constraints	Flood risk
Comments	Site divided by Pochin development land in the south and west and Praxis development land in the north and east. ***Pochin development*** Phase 1 – to begin over 2014/15 (development of 50 dwellings plus estate roads, landscaping and flood prevention works). Phase 1A-1D – to be completed over the next ten years (50 dwellings/year and 25,000 sqm of employment). Phase 2 – completion of employment and local centre development over five years from the end of Phase 1. ***Praxis development*** Phase 1 - to begin over 2014/15 (development of 50 dwellings, completion of link road, provision of employment site D, flood prevention works). Phase 1A-F – 50 dwellings/year over 12 years from the end of Phase 1. Phase 2 – completion of road link, commercial/retail development and employment development over four years of the end of Phase 1. Flood alleviation and river strengthening work to begin in summer 2014. Masterplan produced Within Deeside Enterprise Zone
Planning Issues	Identified as Development Zone (Policy EM3) and within Minerals Safeguarding Area (Policy MIN8) Site of International Importance (Policy WB2) and Statutory Site of National Importance to the south Bounded in the north by a Safeguarded Railway/Transport Scheme (Policy AC7/AC9)
Likely development potential	Mixed use
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park Warehouse/Distribution Park General Business/Industrial Area Heavy/Specialist Industrial Site Incubator/SME Cluster Site Sites for Specific Occupier
Serviced	No
Availability, years	5+



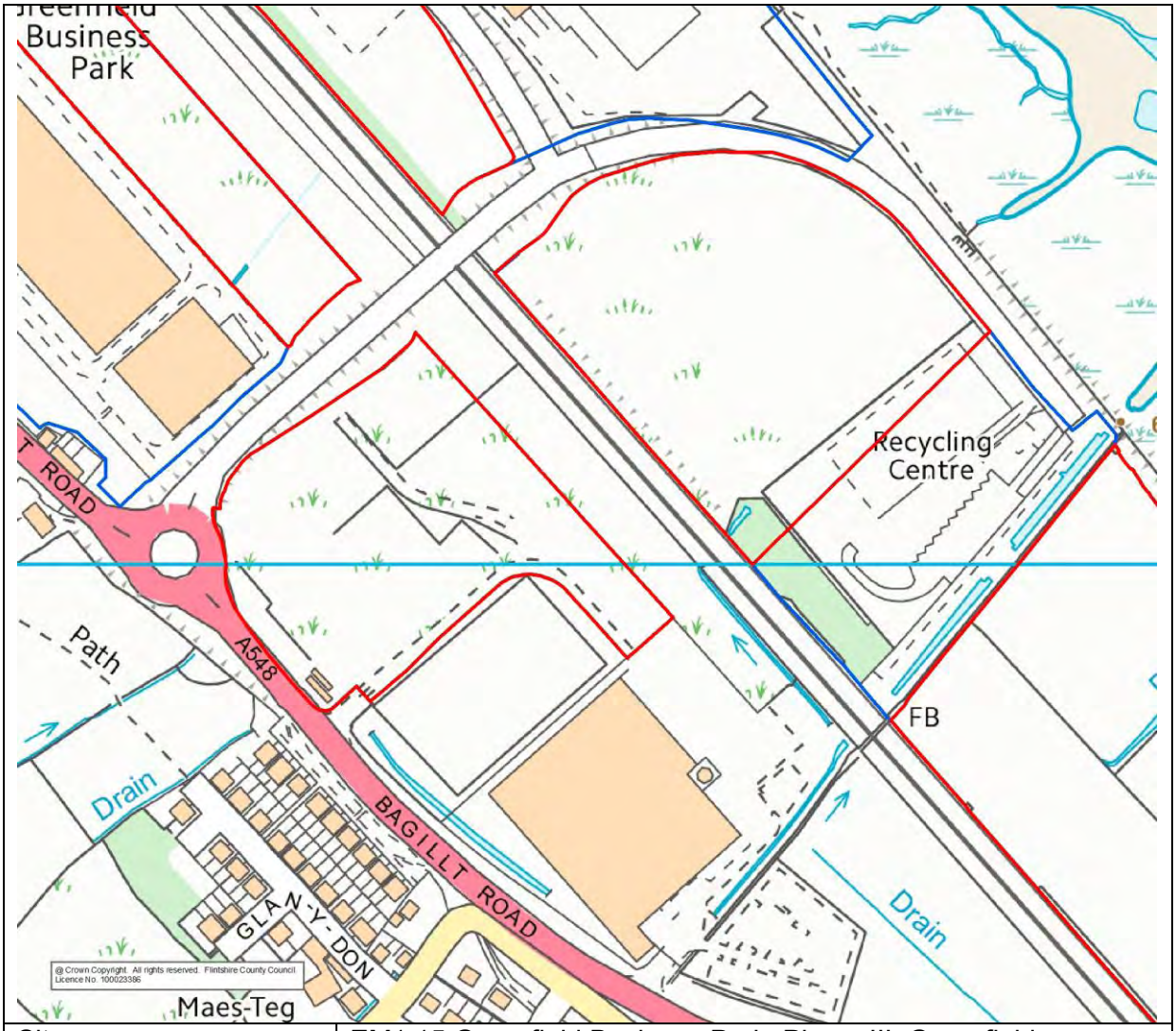
Site	EM1.13 Greenfield Business Park, Phase I, Greenfield
Owner	Flintshire County Council
Agent	-
Size, ha	1.30
Market Availability	Not Available (Held as Expansion Land)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 13)
Proposal	-
Constraints	Backland with constrained access Trees onsite Railway adjacent
Comments	To the rear of Westbridge Furniture, and likely to be expansion land for this business Greenfield Business Park is a Tier 2 Assisted Area
Planning Issues	Site is within a Principal Employment Area (Policy EM3) Safeguarded Road Scheme (Policy AC17) to the north east
Likely development potential	Industrial
Potential guidance	General Business/Industrial Area

market segment uses	Site for Specific Occupier
Serviced	No
Availability, years	3-5



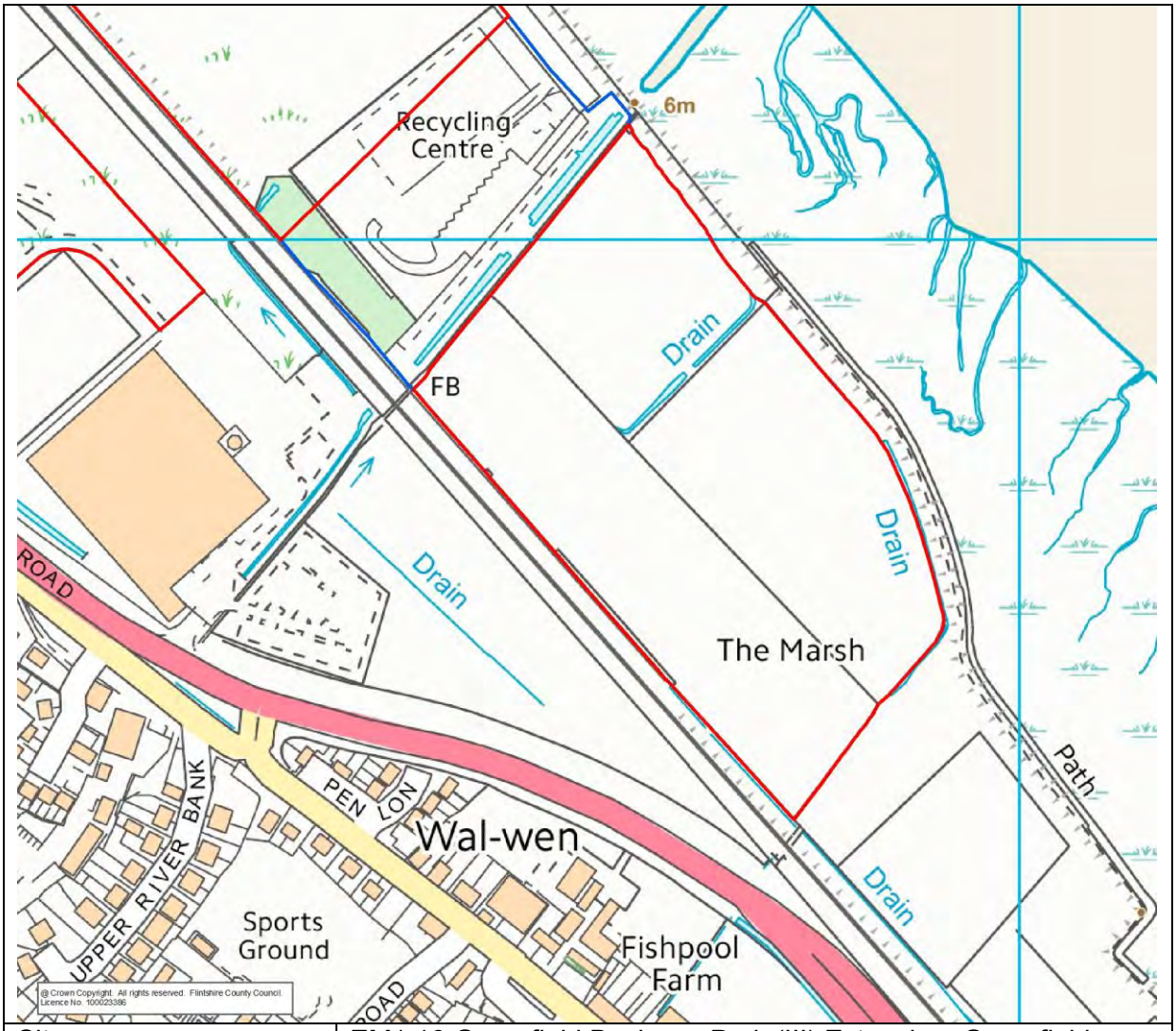
Site	EM1.14 Greenfield Business Park, Phase II, Greenfield
Owner	Flintshire County Council (and others)
Agent	-
Size, ha	1.20
Market Availability	Partly Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 14)
Proposal	-
Constraints	Northern site is contaminated Some access roads are unadopted Potential flood risk Remains of buildings on northern site
Comments	Comprises three sites: • the north-easterly site comprises contaminated brownfield land which is available. Limited interest in this site • the central site in use for lorry parking and open

	storage • the southern site is developed as 'Energi Centre' (training, education, research and development centre) for Kingspan and associated facilities (and is excluded from the land supply) Greenfield Business Park is a Tier 2 Assisted Area
Planning Issues	All sites are identified within a Minerals Safeguarding Area (Policy MIN8) Northern site is bounded to the north and east by a Tourism allocation (Policy T4/T9)
Likely development potential	Industrial/office
Potential guidance market segment uses	Research and Technology/Science Park Warehouse/Distribution Park General Business/Industrial Area Site for Specific Occupiers
Serviced	Yes
Availability, years	5+



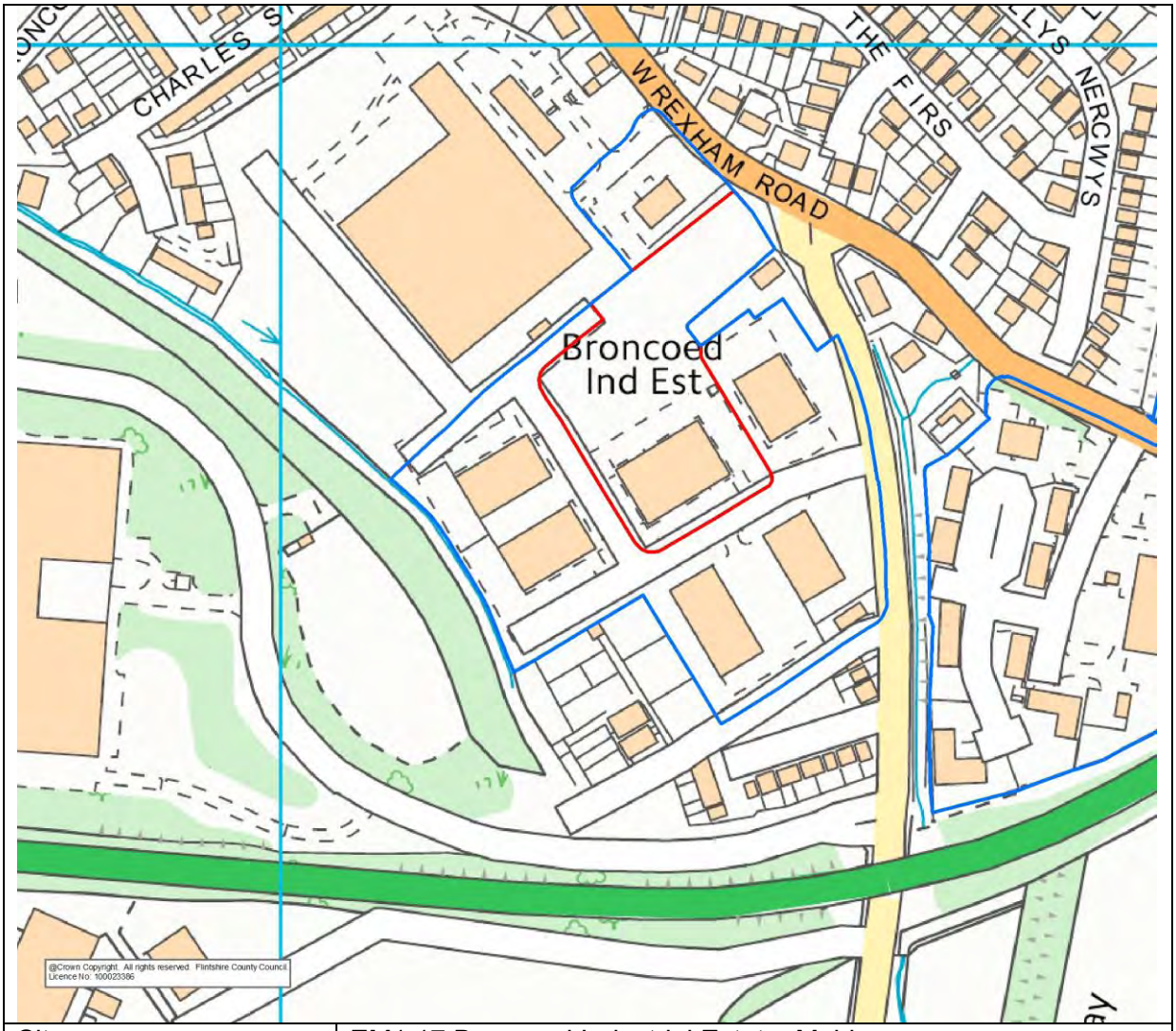
Site	EM1.15 Greenfield Business Park, Phase III, Greenfield
Owner	Eastern site – Flintshire County Council Western site – multiple private individuals
Agent	-
Size, ha	4.40
Market Availability	Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 15)
Proposal	-
Constraints	Trees onsite Eastern site includes remains of buildings Two sites are divided by a railway line Amenity site adjacent to eastern area Flood risk potential to eastern site
Comments	Greenfield Business Park is a Tier 2 Assisted Area
Planning Issues	Both sites identified within a Minerals Safeguarding Area (Policy MIN8) Eastern site is an Area of Search for New Waste Management Facilities (Policy EWP6)

	Two sites are divided by Safeguarded Road Scheme (Policy AC17)
Likely development potential	Industrial
Potential guidance market segment uses	Warehouse/Distribution park General/Business Area Heavy Specialist Industrial Site Site for Specific Occupier Recycling/Environmental Industries
Serviced	No
Availability, years	3-5



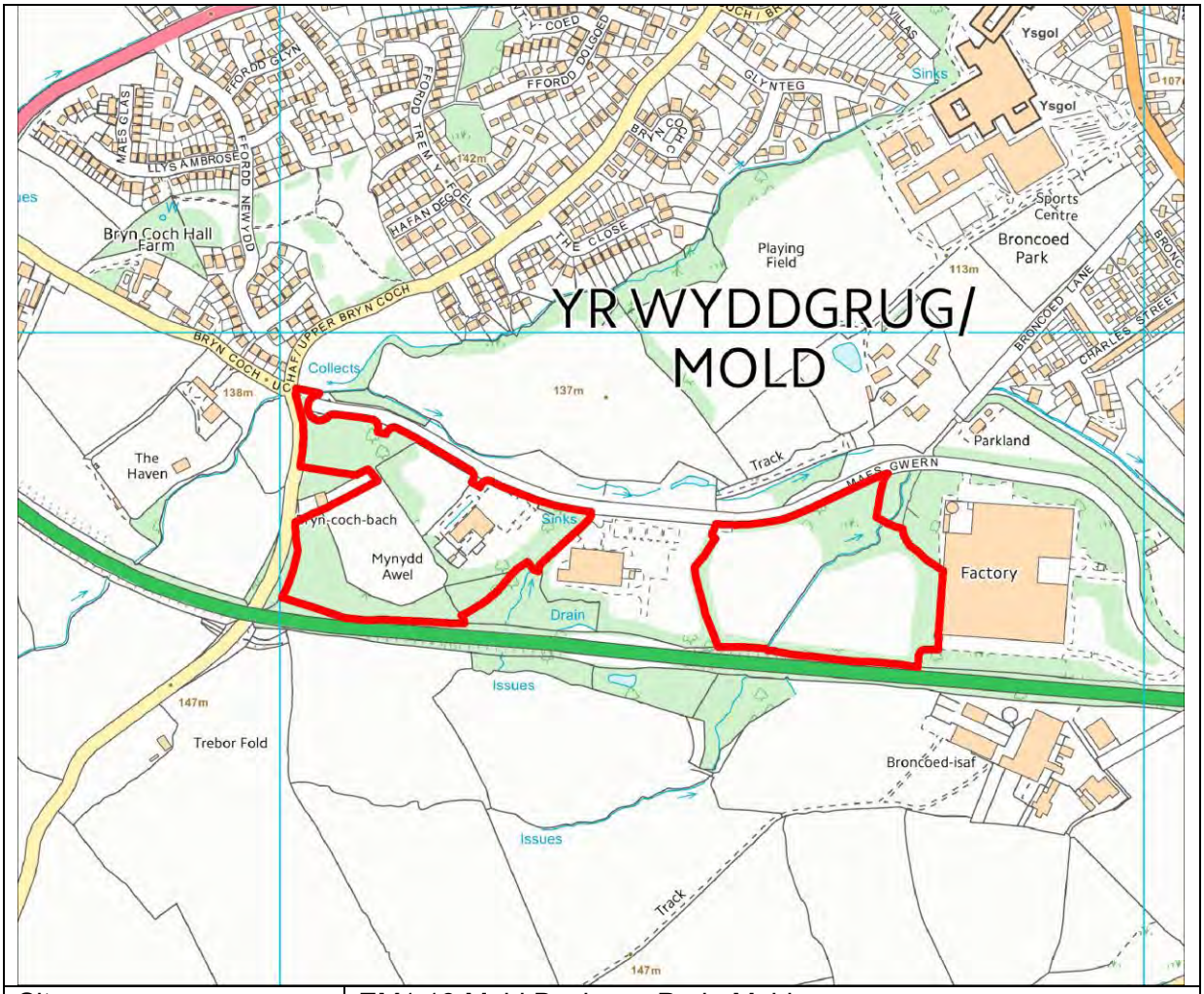
Site	EM1.16 Greenfield Business Park (III) Extension, Greenfield
Owner	Landcare (Puriton)
Agent	-
Size, ha	6.60
Market Availability	Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 16)
Proposal	-
Constraints	Flood risk area Marshy/uneven ground Railway adjacent Amenity site adjacent
Comments	Greenfield Business Park is a Tier 2 Assisted Area Limited interest in this site
Planning Issues	Identified within Minerals Safeguarding Area (Policy MIN8) Adjacent to Statutory Site of National Important (Policy WB3) and RAMSAR/SPA (Dee Estuary) (Policy WB2)
Likely development potential	Industrial
Potential guidance	Warehouse/Distribution park

market segment uses	General/Business Area Heavy Specialist Industrial Site Site for Specific Occupier
Serviced	No
Availability, years	5+



Site	EM1.17 Broncoed Industrial Estate, Mold
Owner	F.G. Whitley & Sons Co
Agent	Legat Owen
Size, ha	0.70
Market Availability	Not Available (Under Development)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 17) Site has permission for light industrial units (App. Ref.: 042134)
Proposal	Proposed for 2,634 sqm of light industrial space in two blocks. These blocks can be sub divided to provide 12 terraced workshop units of 180-364 sqm each.
Constraints	-
Comments	Block A, comprising 1,448 sqm of space in four units of 180 sqm and two units of 364 sqm, has been developed on the south of the site. Premises are now being marketed here. Block B, comprising six units of 180 sqm each, was uncompleted but is now under construction.
Planning Issues	Identified within Principal Employment Area (Policy EM3)
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	Yes
Availability, years	0-1

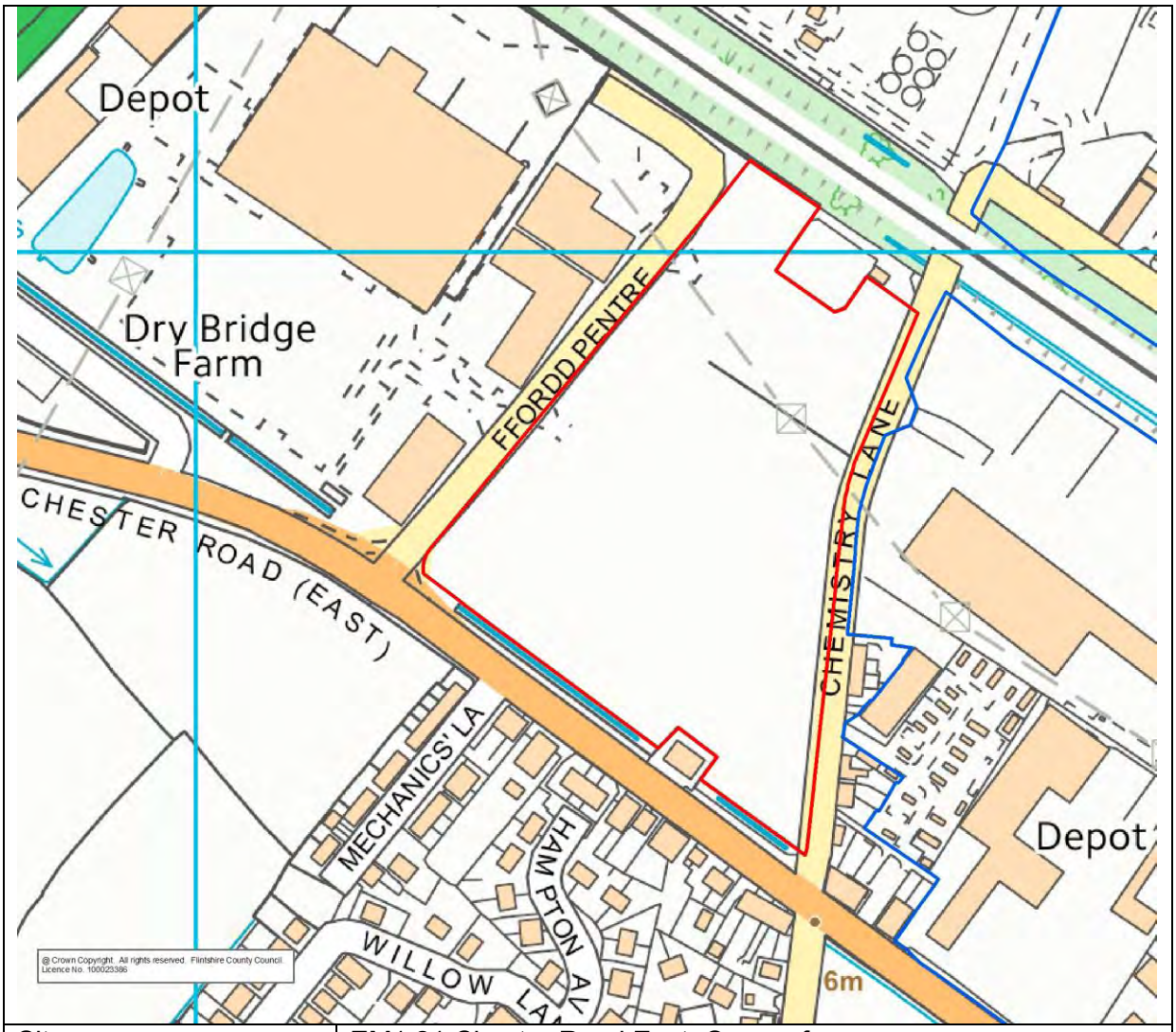


Site	EM1.18 Mold Business Park, Mold
Owner	Eastern site – Hansteen Western site – Part West Coast Energy/Part Flintshire County Council
Agent	-
Size, ha	5.30
Market Availability	Eastern site is Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 18) Eastern site has outline permission for a mixed use development (App. Ref.: 046878)
Proposal	Eastern site proposed for : • 4,920 sqm of B1/B2/B8 employment use (in 12 units of 200-1,295 sqm in size) • A 2,090 sqm hotel and restaurant • Two further development plots held for B1/B2/B8 employment use
Constraints	Trees onsite Stream passes through eastern site Various other watercourses pass through both sites
Comments	Eastern site on the market with outline planning permission

	1.40 ha in western site developed as premises for Atmos Consulting (reduces site size to 3.90 ha)
Planning Issues	Green space (Policy L3) adjacent to both sites and Green Barrier (Policy GEN4) adjacent to western site
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park Research and Technology/Science Park General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3

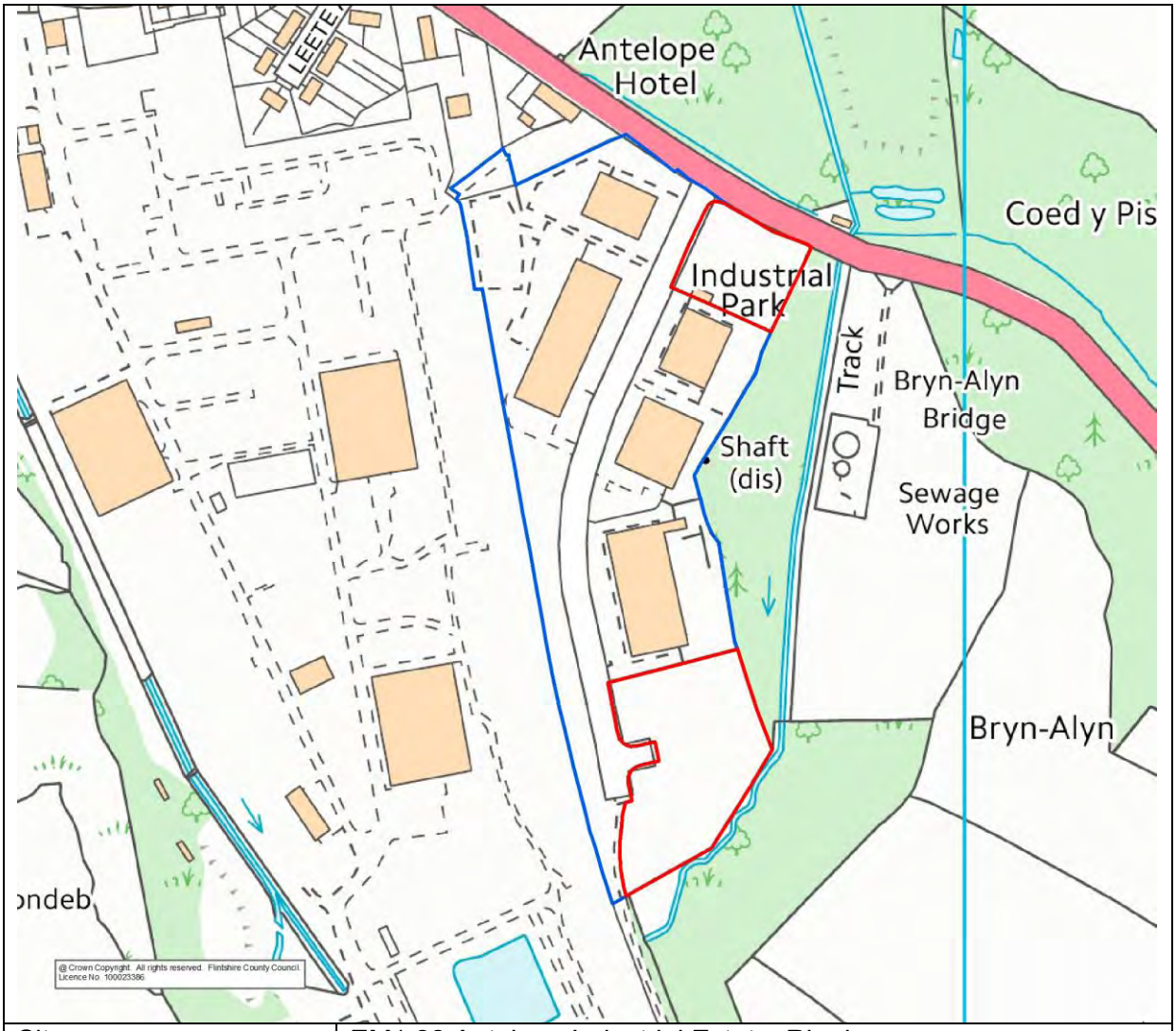
Site	EM1.19 Adjacent Mostyn Docks, Mostyn
Owner	Warwick International
Agent	Sustainable Direction
Size, ha	3.00
Market Availability	Not Available (Owner has Aspirations for Development)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 19)
Proposal	Warwick International is currently seeking full planning permission (Minerals Application Ref. 051924) for a 3,830 sqm combined heat and power plant on 1.32 ha of land in the north of the site. The plant would provide steam and electricity for use by the adjacent Warwick International chemicals plant and for export to the National Grid. The plant would be fuelled by waste wood delivered to the site by HGV.
Constraints	In a floodrisk area Existing buildings and car park onsite Trees onsite Ecological issues along River Dee shore
Comments	If planning consent is obtained, it is anticipated that construction will commence in August/September 2014 and be complete by

	the end of 2015.
Planning Issues	Identified for Area of Search for New Waste Management Facilities (Policy EWP6) In Minerals Safeguarding Area (Policy MIN8) Adjacent to Sites of International Importance (Policy WB2), Statutory Site of National Importance (Policy WB3), RAMSAR/SPA (Dee Estuary) (Policy WB2),
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	No
Availability, years	1-3



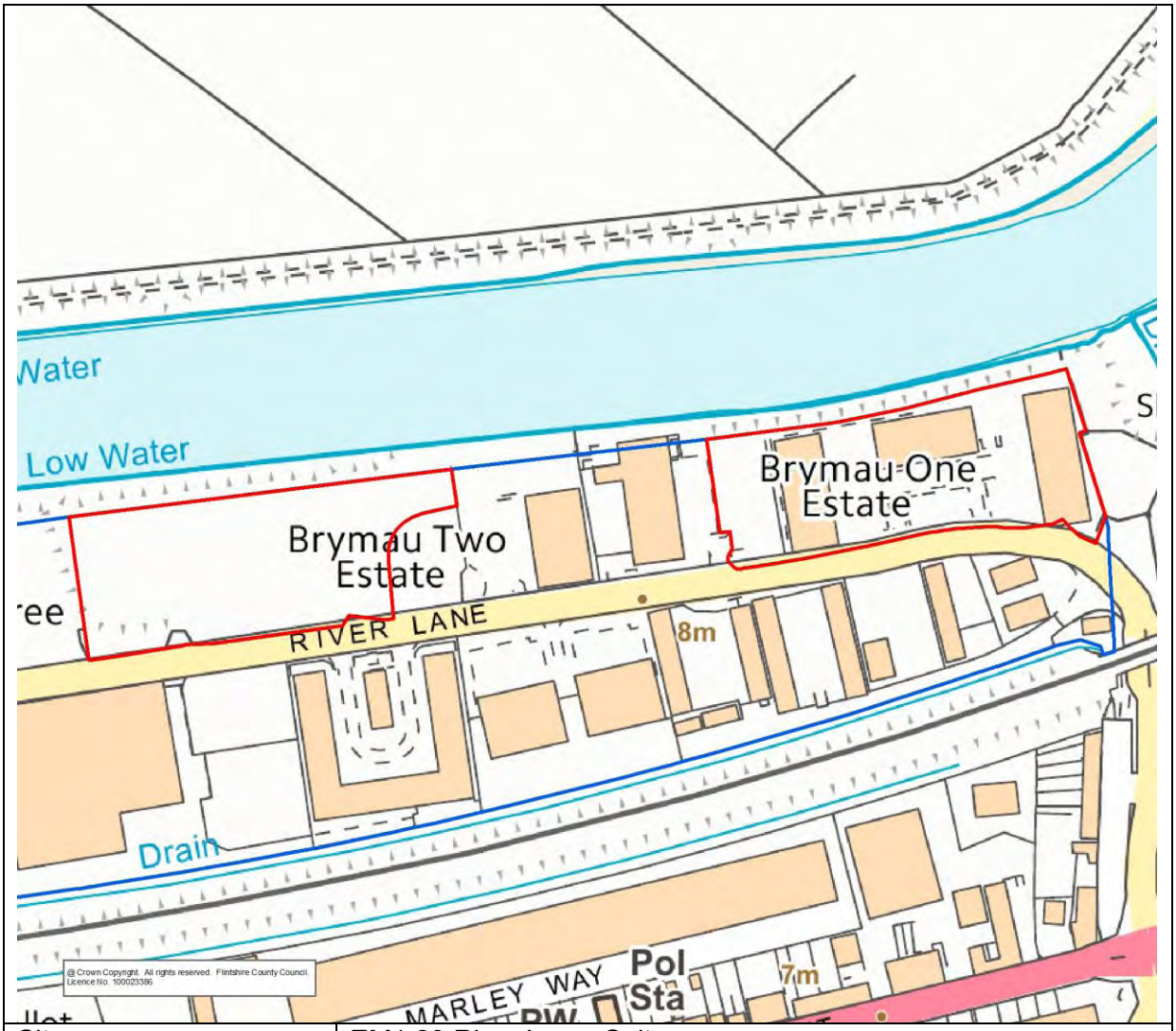
Site	EM1.21 Chester Road East, Queensferry
Owner	Stretton Estates
Agent	Legat Owen
Size, ha	3.50
Market Availability	On the Market
Planning Status	EM1 General Employment Land Allocation (Ref. No. 21)
Proposal	On the market for motor trade, leisure, office and industrial uses
Constraints	Adjacent to railway line
Comments	Plots available from 0.40 ha Quoted price is £371,000/ha Also offered for design and build options of 465-14,000 sqm
Planning Issues	-
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established Potential Office Location High Quality Business Park

	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



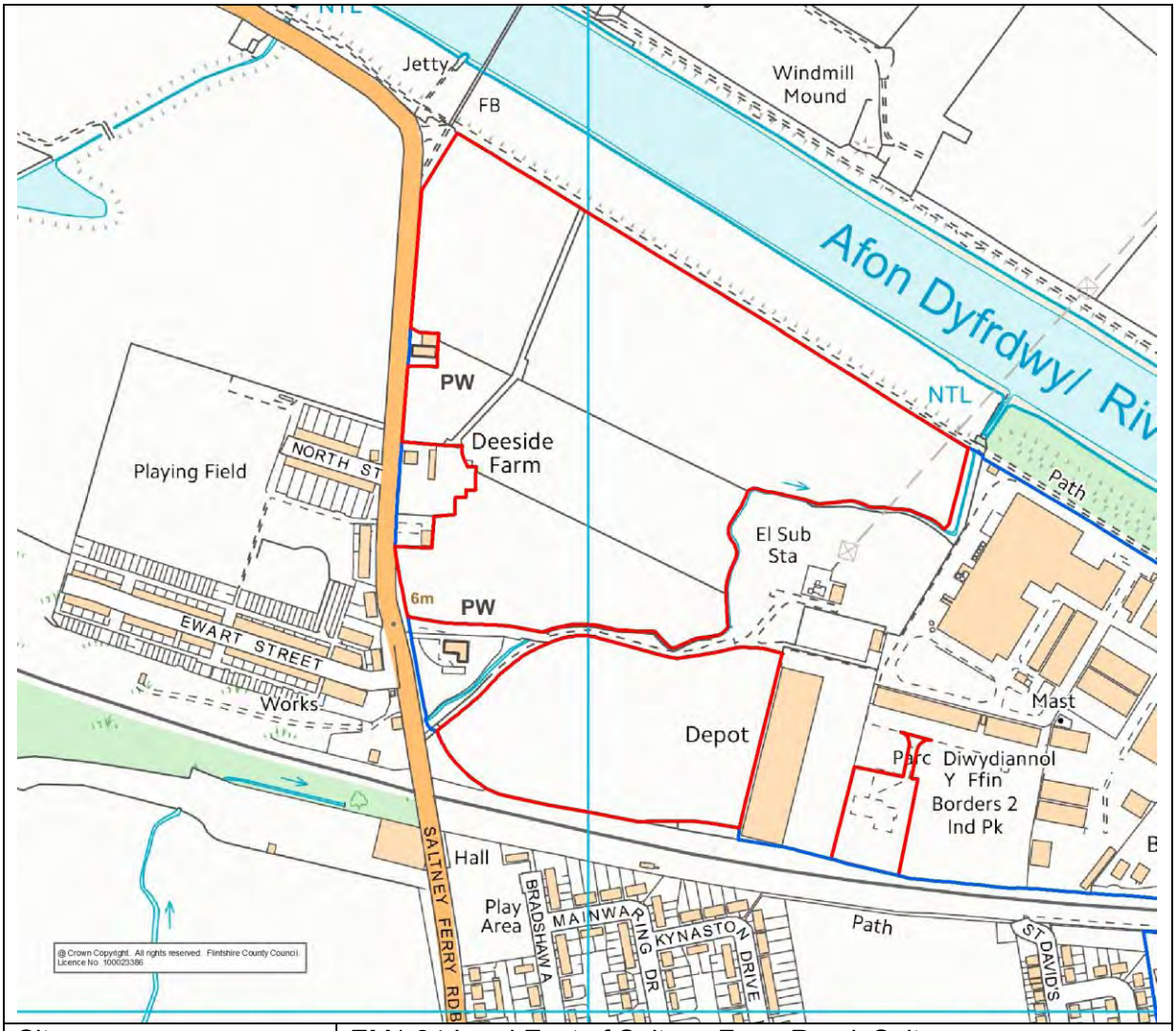
Site	EM1.22 Antelope Industrial Estate, Rhydymwyn
Owner	F.G. Whitley & Sons Co
Agent	-
Size, ha	1.10
Market Availability	Not Available (Held as Expansion Land)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 22)
Proposal	Held to meet the expansion needs of existing businesses within Antelope Industrial Estate However, F.G. Whitley & Sons would also be willing to make the site available to an incoming business as a design and build option
Constraints	Ecological issues
Comments	-
Planning Issues	Identified within Principal Employment Area (Policy EM3) and Mineral Safeguarding (Policy MIN8)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site

	Site for Specific Occupiers Recycling/Environmental Industries Site
Serviced	Yes
Availability, years	5+



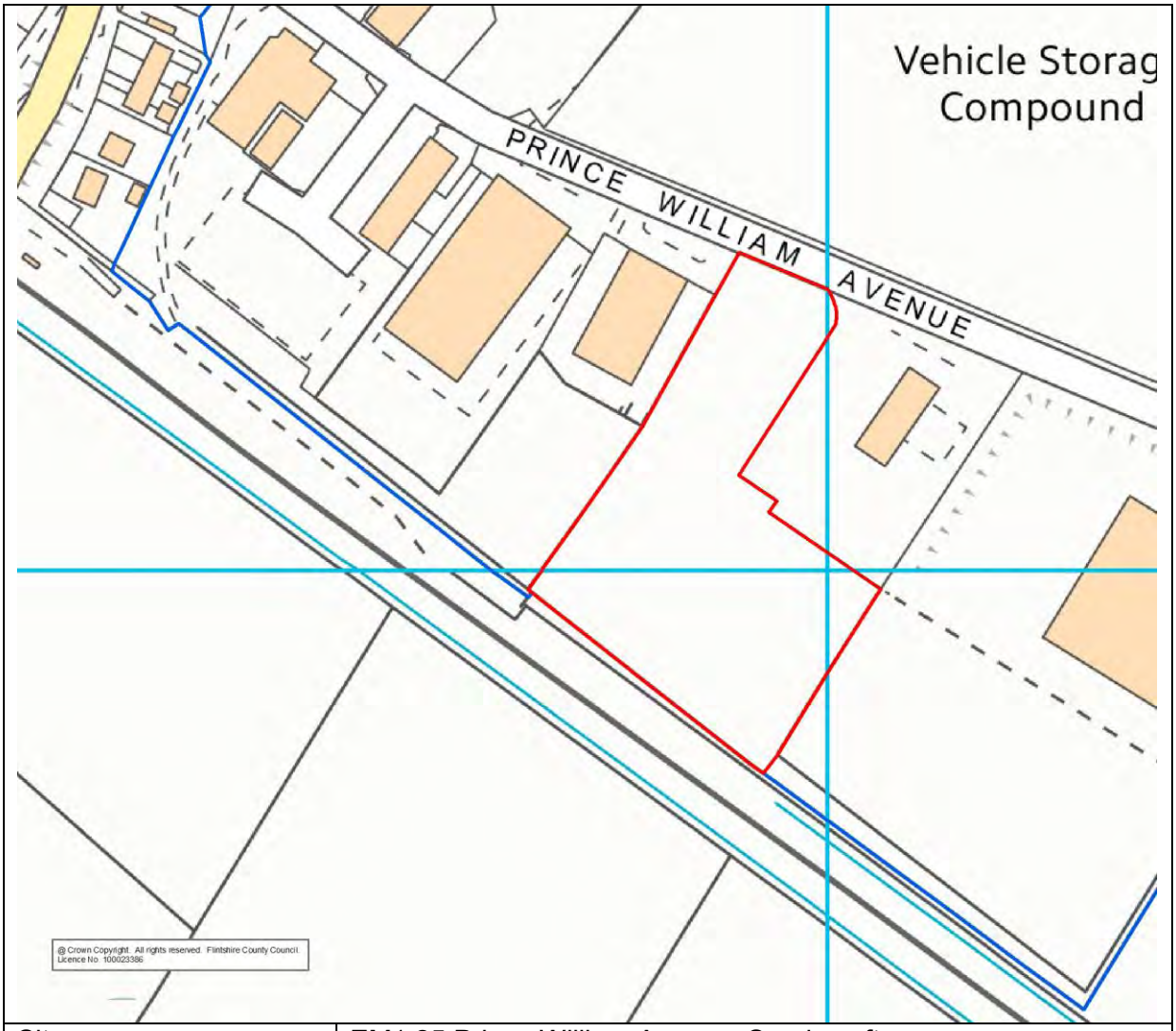
Site	EM1.23 River Lane, Saltney
Owner	Brymau Estates (western site)
Agent	-
Size, ha	1.10
Market Availability	Available
Planning Status	EM1 General Employment Land Allocation (Ref. No. 23)
Proposal	-
Constraints	Constrained access to River Lane Flood risk
Comments	Eastern site developed as Riverside Trade Park comprising six units (and excluded from the land supply total) Western site remains undeveloped, partly in use for open storage
Planning Issues	Adjacent to Minerals Safeguarding (Policy MIN8), Sites of International Importance (Policy WB2), Statutory Site of National Importance (Policy WB3), RAMSAR/SPA (Dee Estuary) (Policy WB2), Principal Employment Area (Policy EM3)
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



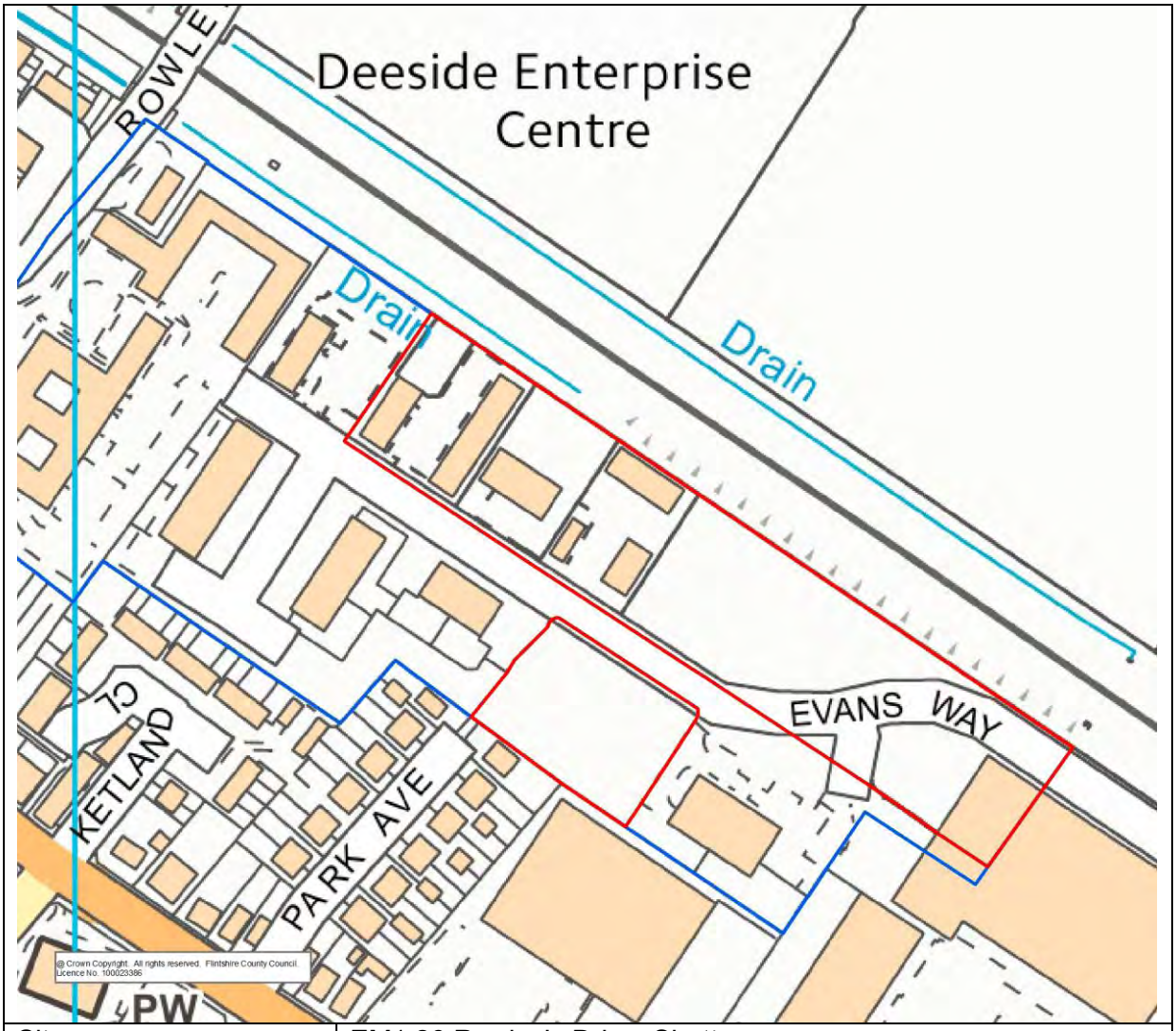
Site	EM1.24 Land East of Saltney Ferry Road, Saltney
Owner	Hawarden Estate
Agent	William Hall & Co/Mason Owen
Size, ha	14.60
Market Availability	On the Market
Planning Status	EM1 General Employment Land Allocation (Ref. No. 24) Has outline planning permission for B1/B2/B8 uses (various consents)
Proposal	For sale as a freehold development site with consent for B Class employment
Constraints	Flood risk Poor access to the south Trees onsite
Comments	Marketed as Ferry Point Various proposals to provide improved access to Saltney Ferry Road including extension to River Lane and additional bridge across the River Dee
Planning Issues	Identified within Minerals Safeguarding (Policy MIN8) and

	Principal Employment Area (Policy EM3) Adjacent to Sites of International Importance (Policy WB2), Statutory Site of National Importance (Policy WB3), RAMSAR/SPA (Dee Estuary) (Policy WB2), Green Barrier (Policy GEN4)
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park General Business/Industrial Area Site for Specific Occupiers
Serviced	No
Availability, years	3-5



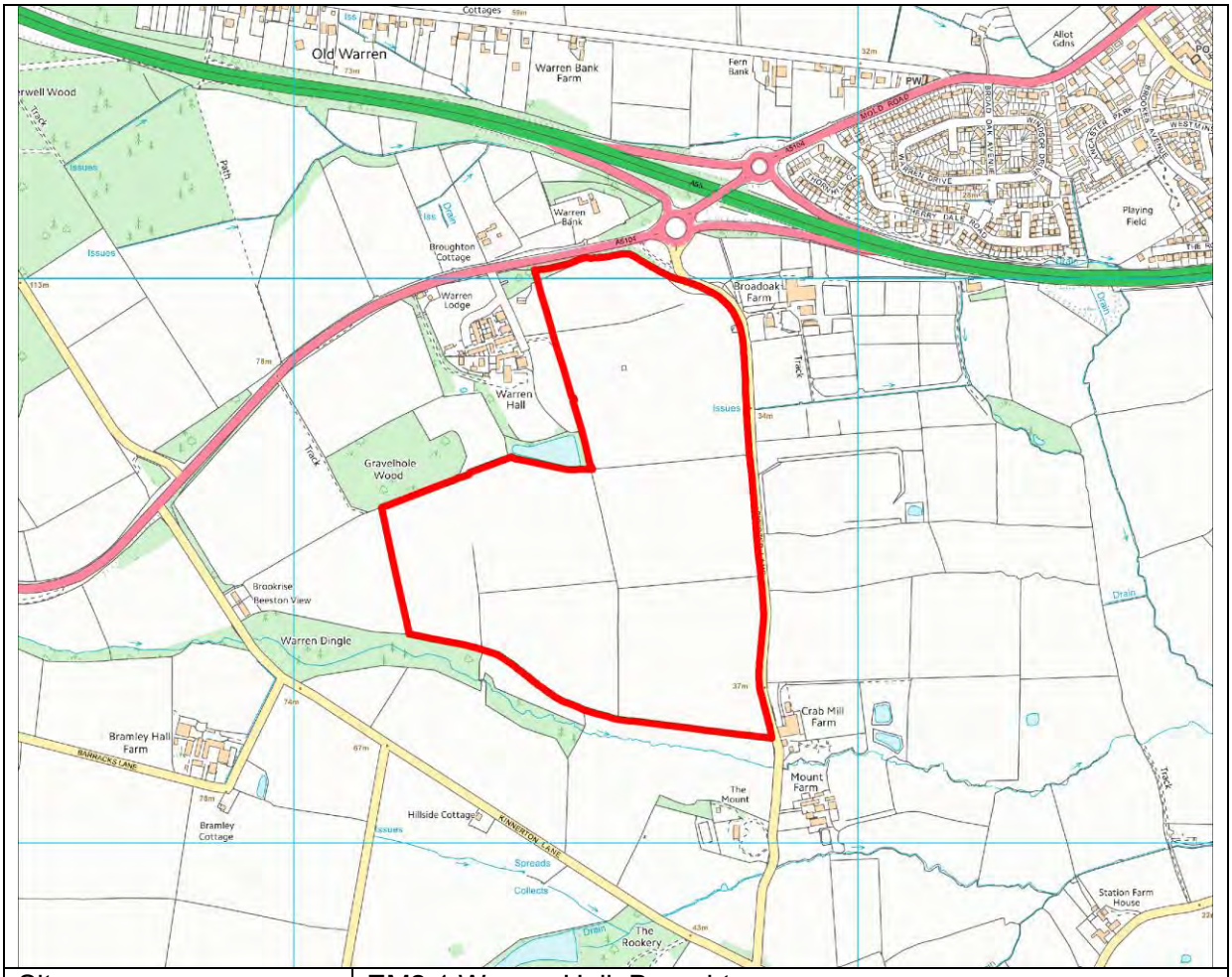
Site	EM1.25 Prince William Avenue, Sandycroft
Owner	Hollingsworth Bros UK
Agent	-
Size, ha	1.80
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	EM1 General Employment Land Allocation (Ref. No. 25)
Proposal	Full application for six industrial/business buildings with a total floor space of 5,460 sqm under consideration by Flintshire County Council
Constraints	Trees onsite
Comments	-
Planning Issues	Identified for Area of Search for New Waste Management Facilities (Policy EWP6) and within a Principal Employment Area (Policy EM3) Adjacent to Green Barrier (Policy GEN4) and Minerals Safeguarding Area (Policy MIN8)
Likely development	Industrial

potential	
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Recycling/Environmental Industries Site
Serviced	No
Availability, years	1-3



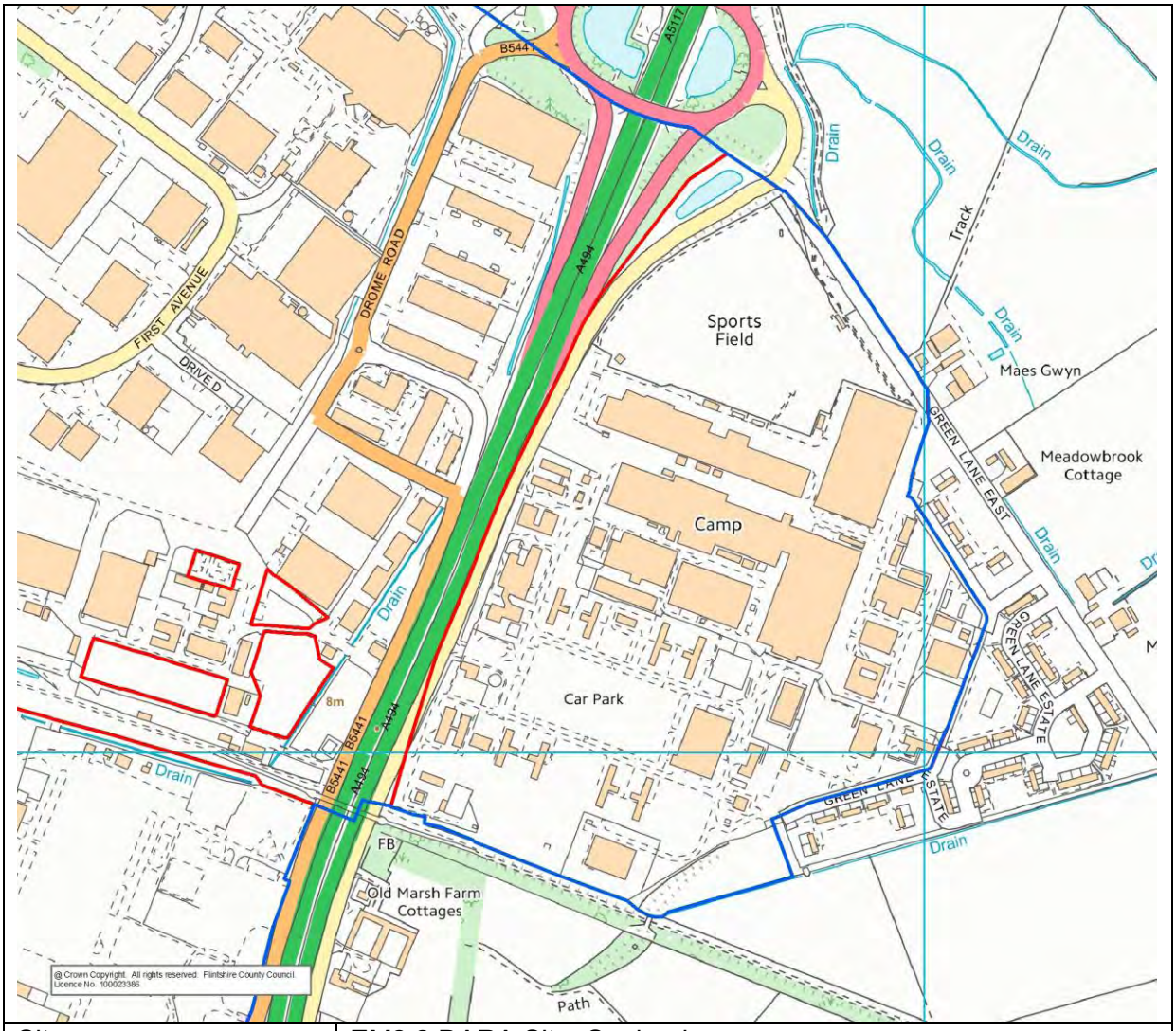
Site	EM1.26 Rowley's Drive, Shotton
Owner	Flintshire County Council
Agent	Legat Owen
Size, ha	0.70
Market Availability	On the Market
Planning Status	EM1 General Employment Land Allocation (Ref. No. 26)
Proposal	Remaining land for sale for B1/B2/B8 employment uses
Constraints	Trees onsite Adjacent to railway
Comments	Most of northern site developed for light industrial units (and excluded from the land supply total) 0.70 ha available in the south and west of Evans Way Quoted price is £375,000/ha Also previously considered as Travelling Showpeople's accommodation
Planning Issues	Identified within a Principal Employment Area (Policy EM3) and adjacent to Minerals Safeguarding Area (Policy MIN8)

Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupiers
Serviced	No
Availability, years	1-3



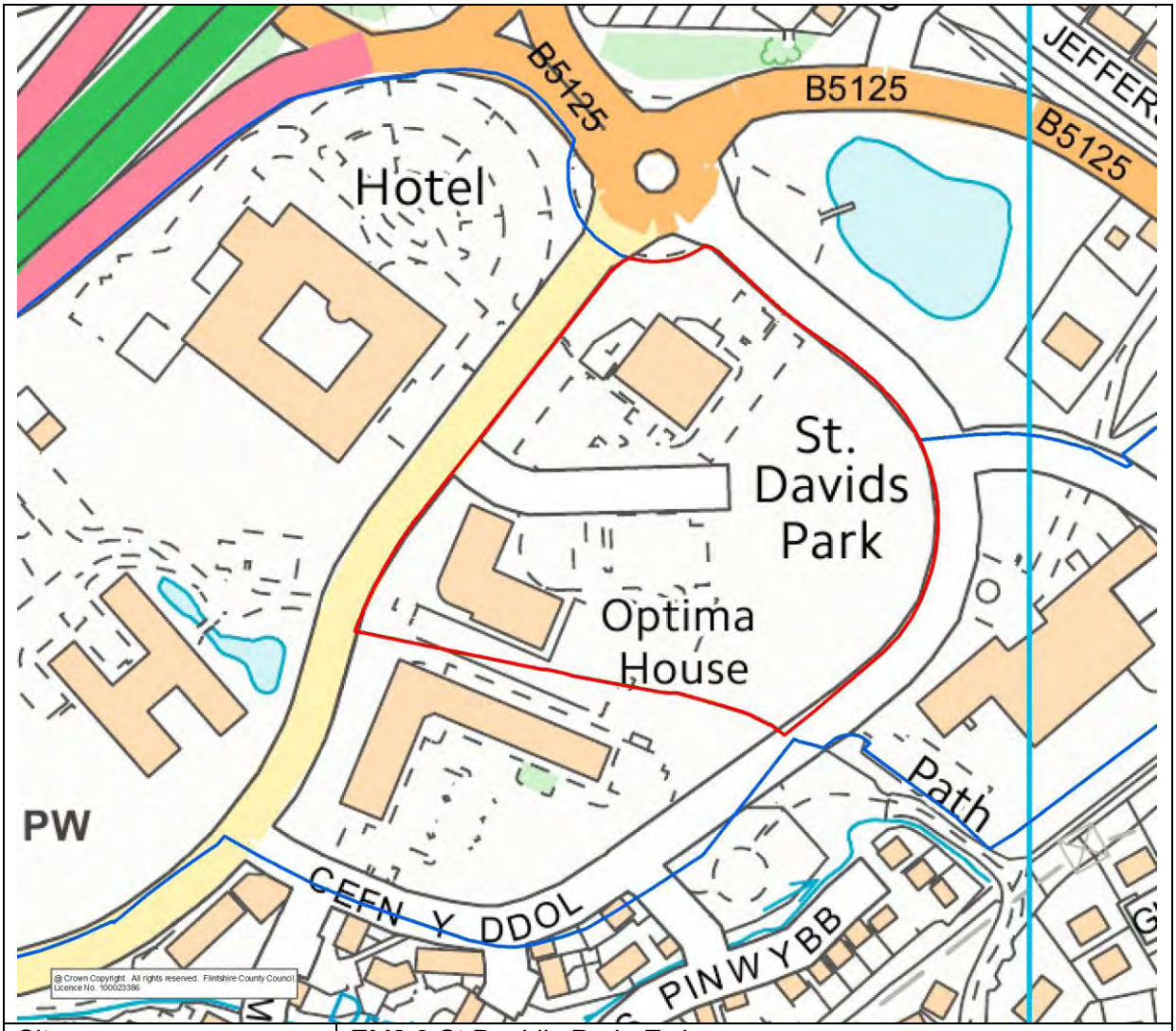
Site	EM2.1 Warren Hall, Broughton
Owner	Welsh Government
Agent	-
Size, ha	36.50
Market Availability	Available
Planning Status	EM2 High Quality Site Allocation (Ref. No. 1) Outline consent for B1 Business Park Various reserved matters consent for landscaping and access
Proposal	76,394 sqm business park (Class B1), hotel and associated leisure facilities, roadway, car parking, drainage and landscaping, and off-site roadworks including new slip roads from A55
Constraints	Trees onsite
Comments	Welsh Government not actively marketing this site Was originally identified as second Chester Business Park however, is no longer a priority site Seen as secondary priority to development of EM1.12 Long term development opportunity, potentially available to accommodate a mix of uses appropriate to this location
Planning Issues	Parts of the south west and north east are Minerals Safeguarding Areas (Policy MIN8)
Likely development	Office

potential	
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park Incubator/SME Cluster Site
Serviced	No
Availability, years	5+



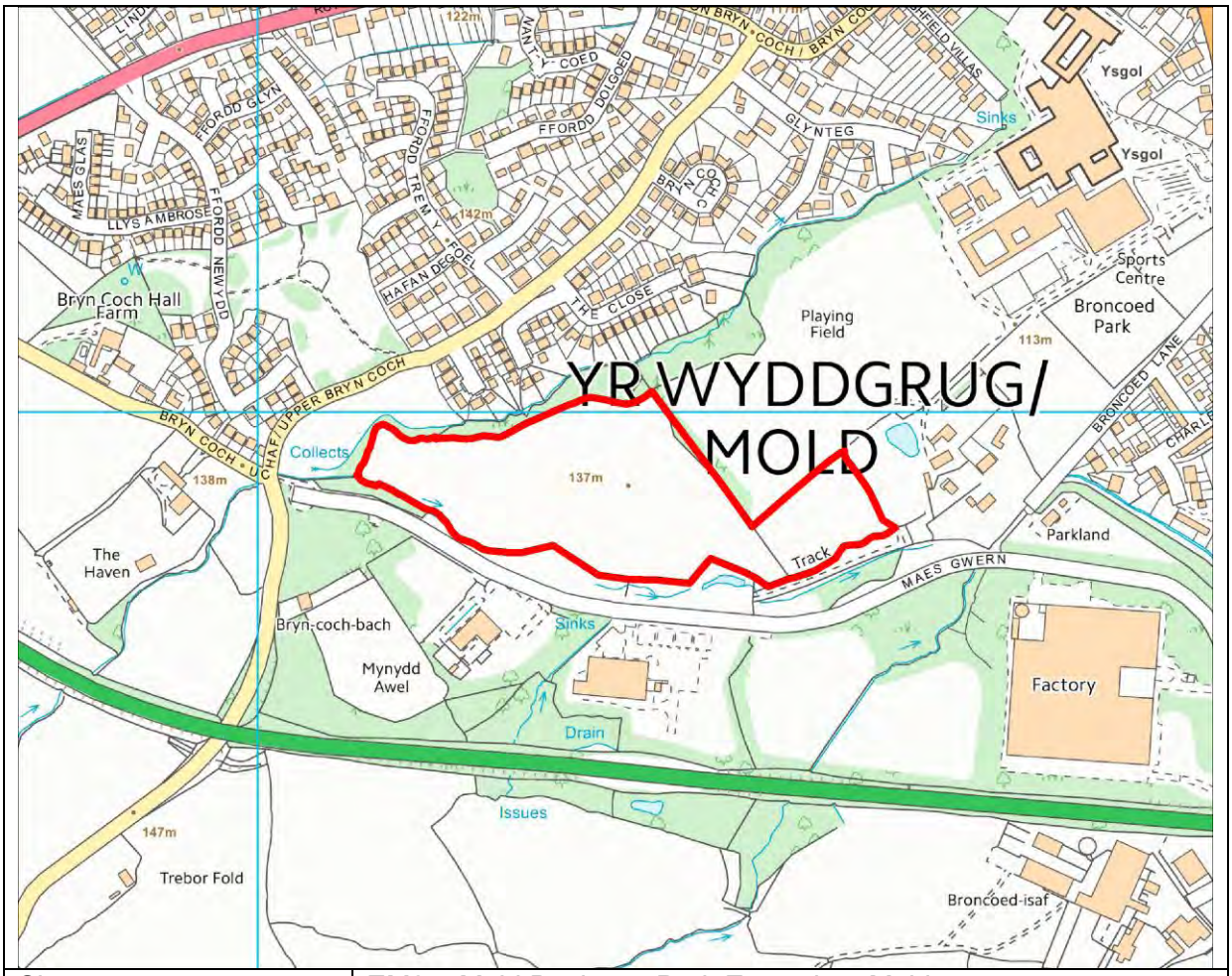
Site	EM2.2 DARA Site, Sealand
Owner	Ministry of Defence
Agent	-
Size, ha	18.50
Market Availability	Available
Planning Status	EM2 High Quality Site Allocation (Ref. No. 2)
Proposal	-
Constraints	Existing buildings on site; some still in use Possible contamination from historic uses Trees onsite
Comments	Former RAF complex Range of former military buildings on the site; some still occupied by private companies Appears to function (at least in part) as active industrial estate Development land in the north and other development plots/unused premises spread throughout the complex Coherent redevelopment here would be difficult
Planning Issues	Site is within Development Zone (Policy EM3) and Mineral

	Safeguarding Area (Policy MIN8) Safeguarded Railway Scheme (Policy AC7) to the south Bounded by Green Barrier Land (Policy GEN4)
Likely development potential	Industrial/Office
Potential guidance market segment uses	Established/Potential Office Location General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupier
Serviced	Yes
Availability, years	5+



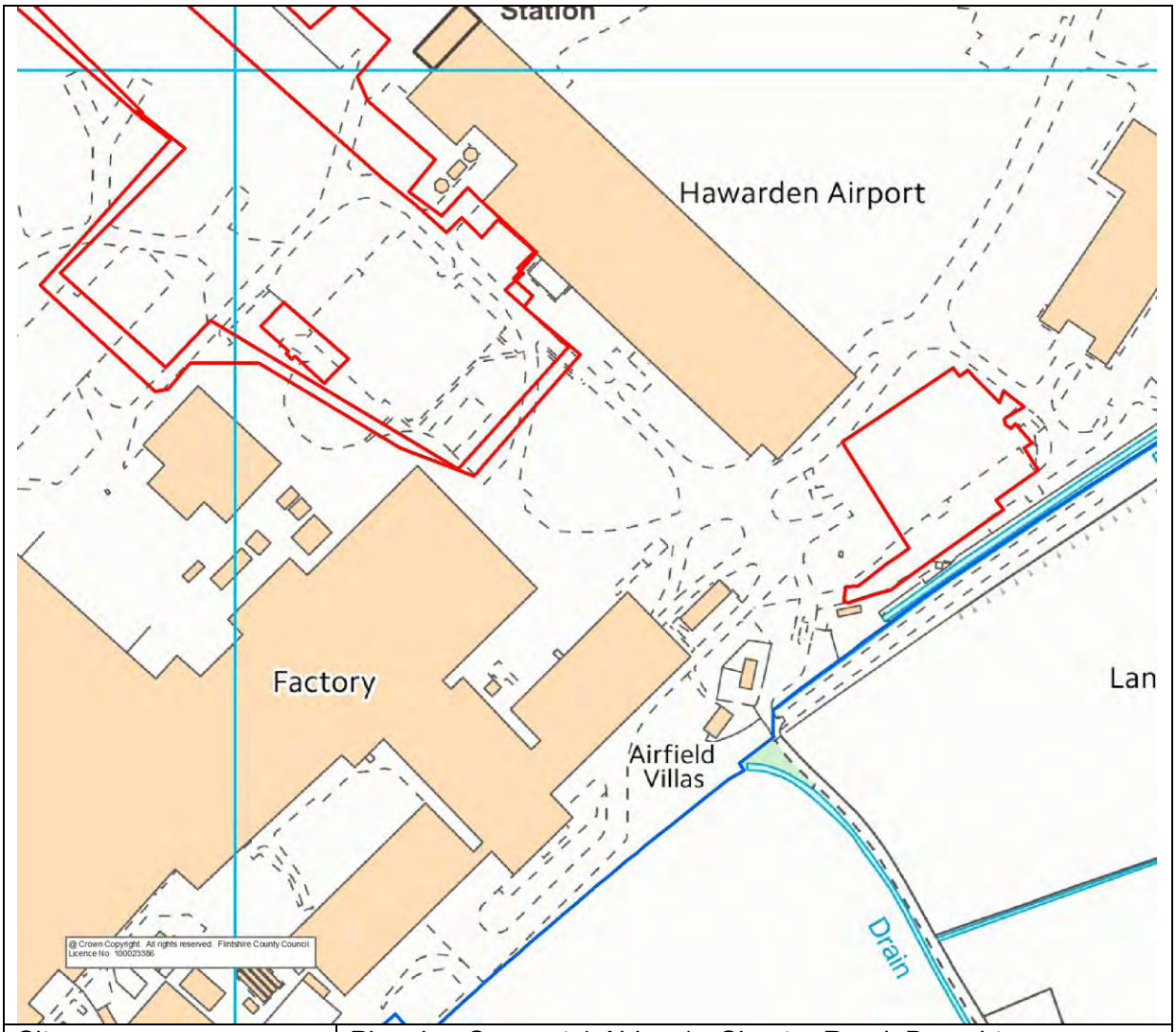
Site	EM2.3 St David's Park, Ewloe
Owner	Ownership unclear
Agent	-
Size, ha	0.80
Market Availability	Available
Planning Status	EM2 High Quality Site Allocation (Ref. No. 3)
Proposal	-
Constraints	-
Comments	Most of the western and northern area has been developed for large self-contained office units (and excluded from the land supply total) One large plot remains in the east suitable for another large self-contained office property or scheme of multi-let office suites
Planning Issues	Identified within Principal Employment Area (Policy EM3)
Likely development potential	Office
Potential guidance market segment uses	Established/Potential Office Location High Quality Business Park

	Site for Specific Occupiers
Serviced	No
Availability, years	3-5



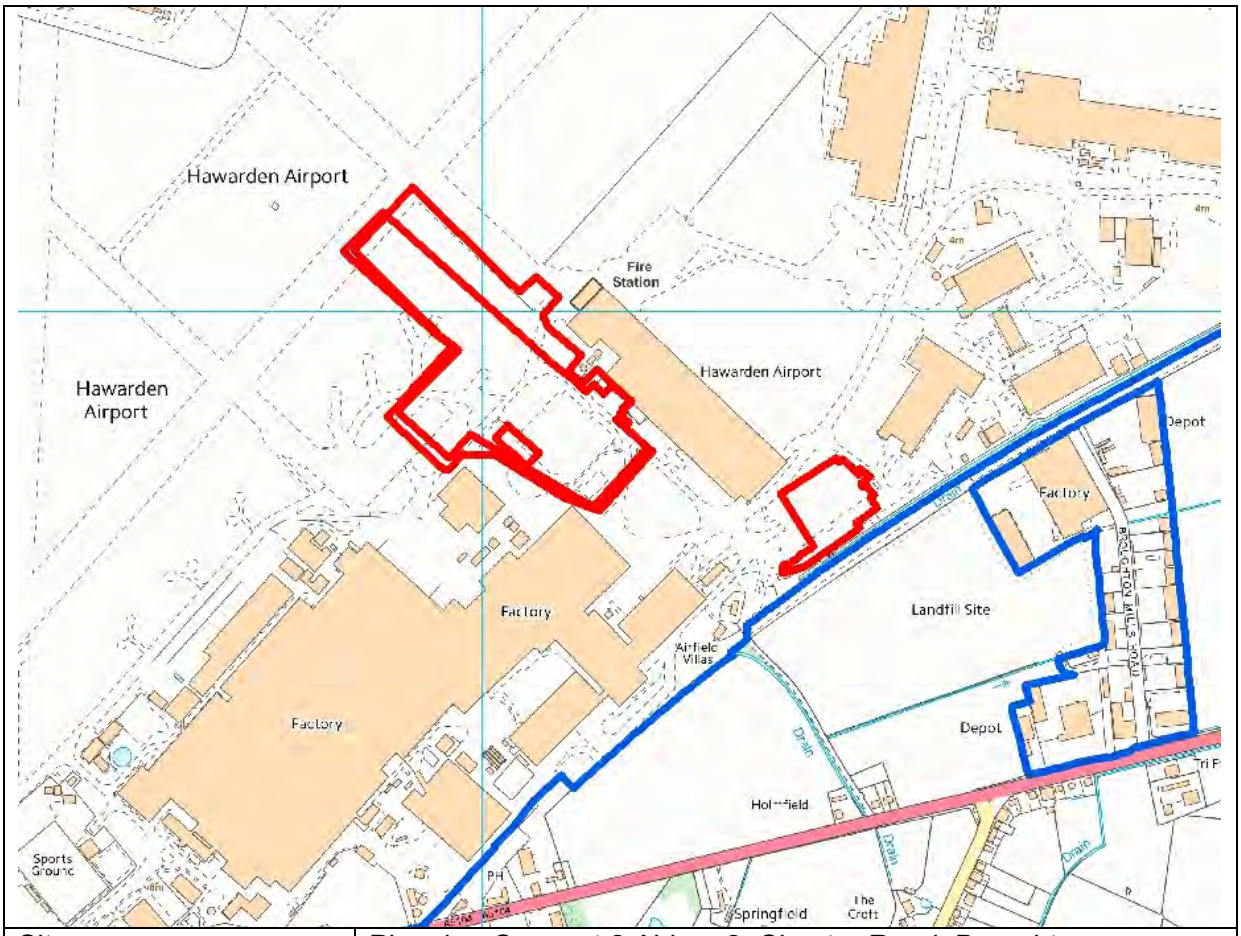
Site	EM2.4 Mold Business Park Extension, Mold
Owner	Flintshire County Council
Agent	-
Size, ha	5.00
Market Availability	On the Market
Planning Status	EM2 High Quality Site Allocation (Ref. No. 4)
Proposal	-
Constraints	Trees onsite Various watercourses cross the site Flood risk Uneven site
Comments	Long term allocation Since 1996 only 1 ha has been developed here Development costs are expected to be high and development for B Class employment uses may not be financially viable In the long term may be considered for alternative uses such as housing
Planning Issues	Bounded by Green Spaces (Policy L3)
Likely development potential	Office/Industrial
Potential guidance market segment uses	Established/Potential Office General Business/Industrial Area

Serviced	No
Availability, years	5+



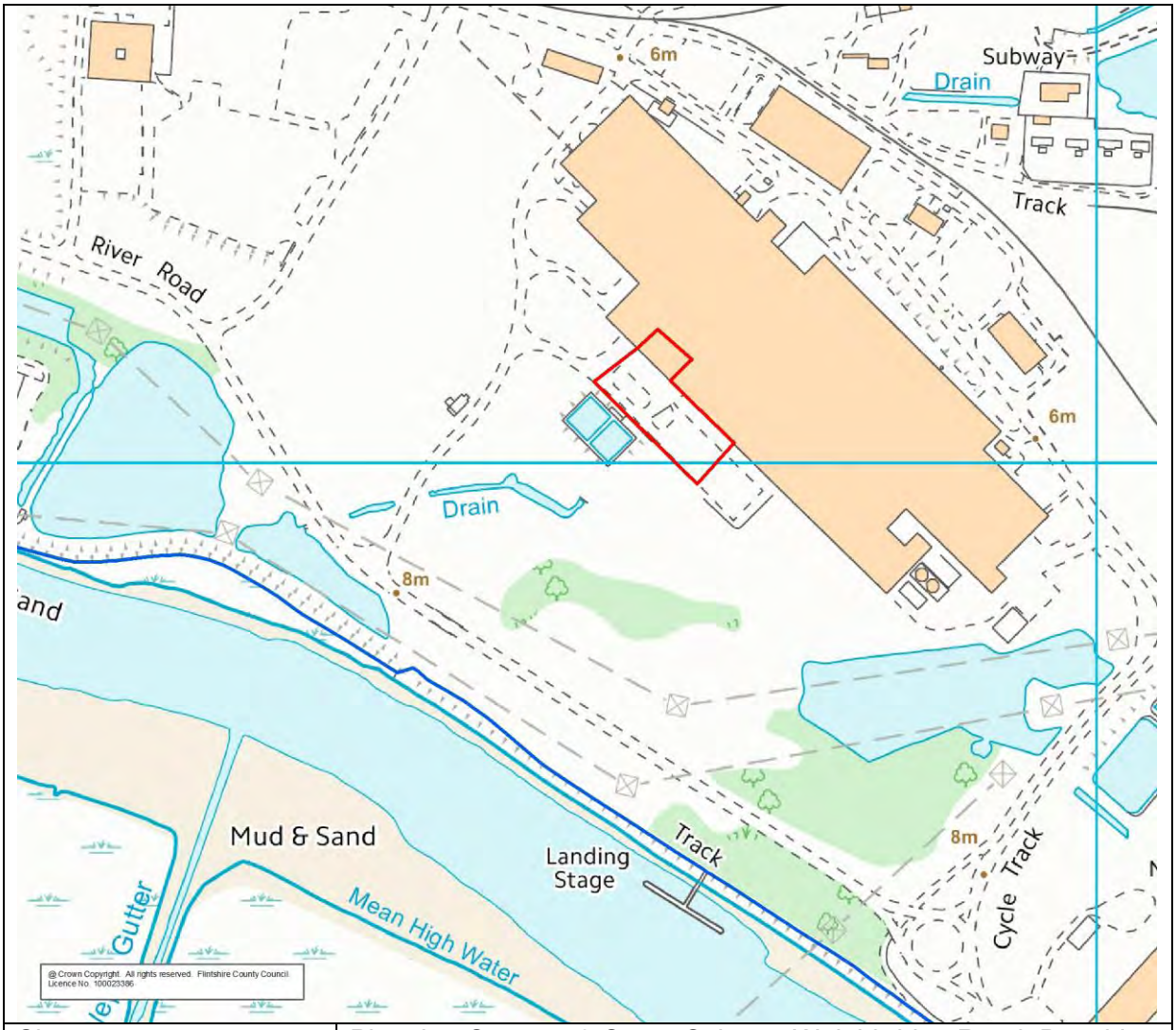
Site	Planning Consent 1 Airbus1 , Chester Road, Broughton
Owner	Airbus
Agent	Axis
Size, ha	1.03
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	Full planning consent for B8 employment use (App. Ref. 050157)
Proposal	Proposed single aisle despatch facility with a total floorspace of 954 sqm, relocation of the car park serving Site 5 (wing assembly and painting facilities) and realigned internal access roads within the Airbus site.
Constraints	-
Comments	-
Planning Issues	Identified within a Development Zone (Policy EM3) and Minerals Safeguarding Area (Policy MIN8)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupier

Serviced	Yes
Availability, years	1-3



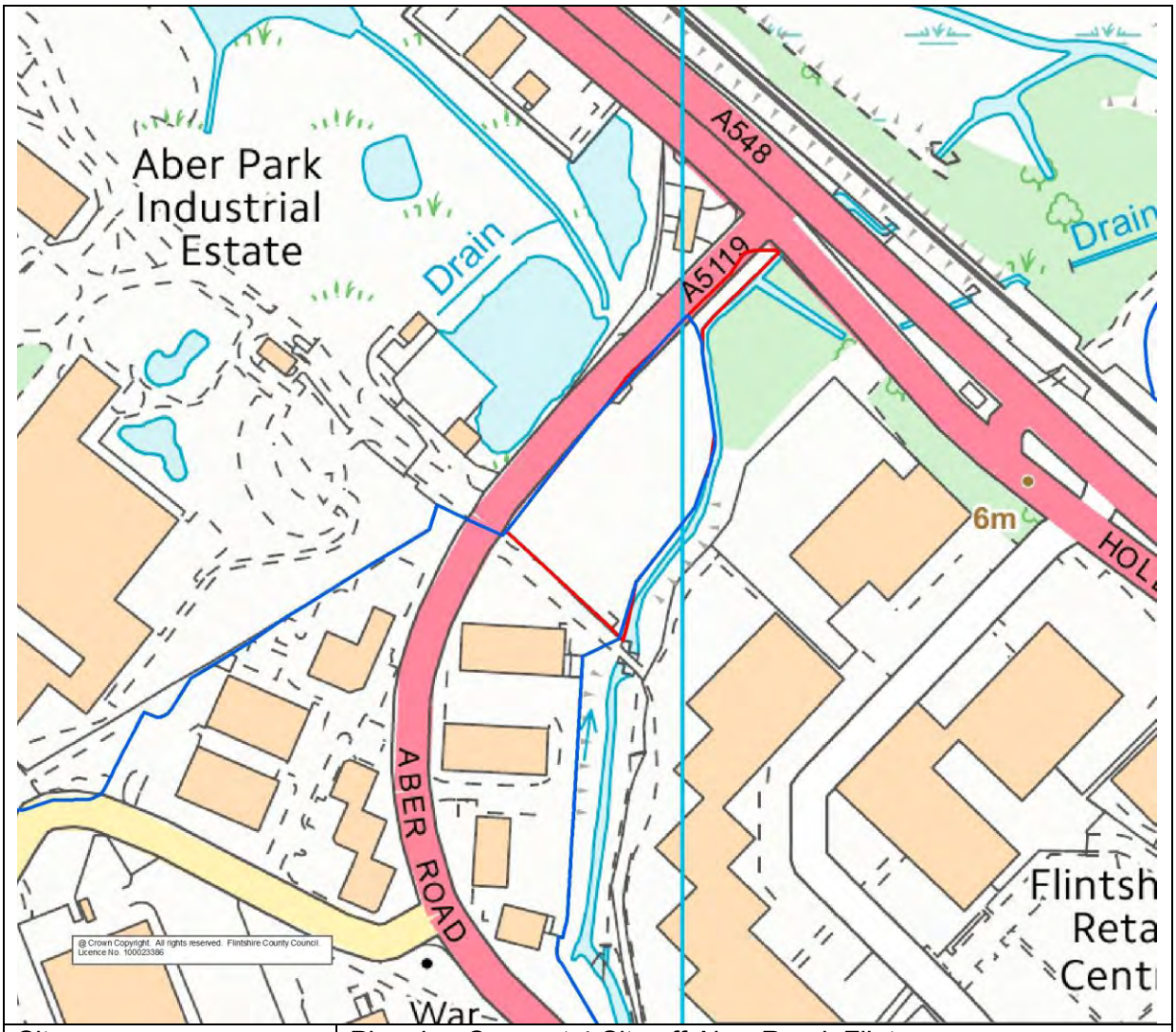
Site	Planning Consent 2 Airbus 2, Chester Road, Broughton
Owner	Airbus
Agent	Axis
Size, ha	6.36
Market Availability	Not Available (Held as Expansion Land)
Planning Status	Full planning consent for the construction and operation of the beluga line station and associated development including preparatory earthworks (App. Ref. 050597)
Proposal	Construction and operation of the Beluga Line Station (modified proposals from planning permission Ref 051119) equating to 4,781 sqm of B2 Use Class floorspace comprising: • a single building with an attached three-storey office/welfare block • a separate GSE shelter (for the storage of support and equipment used in the Beluga transportation process). Ancillary development includes the provision of a car park, utility infrastructure (including foul and surface water drainage), a HGV turning area, footways and access roads.
Constraints	-
Comments	-
Planning Issues	Identified within a Development Zone (Policy EM3) and Minerals Safeguarding Area (Policy MIN8)
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Heavy/Specialist Industrial Site Site for Specific Occupier
Serviced	Yes
Availability, years	1-3



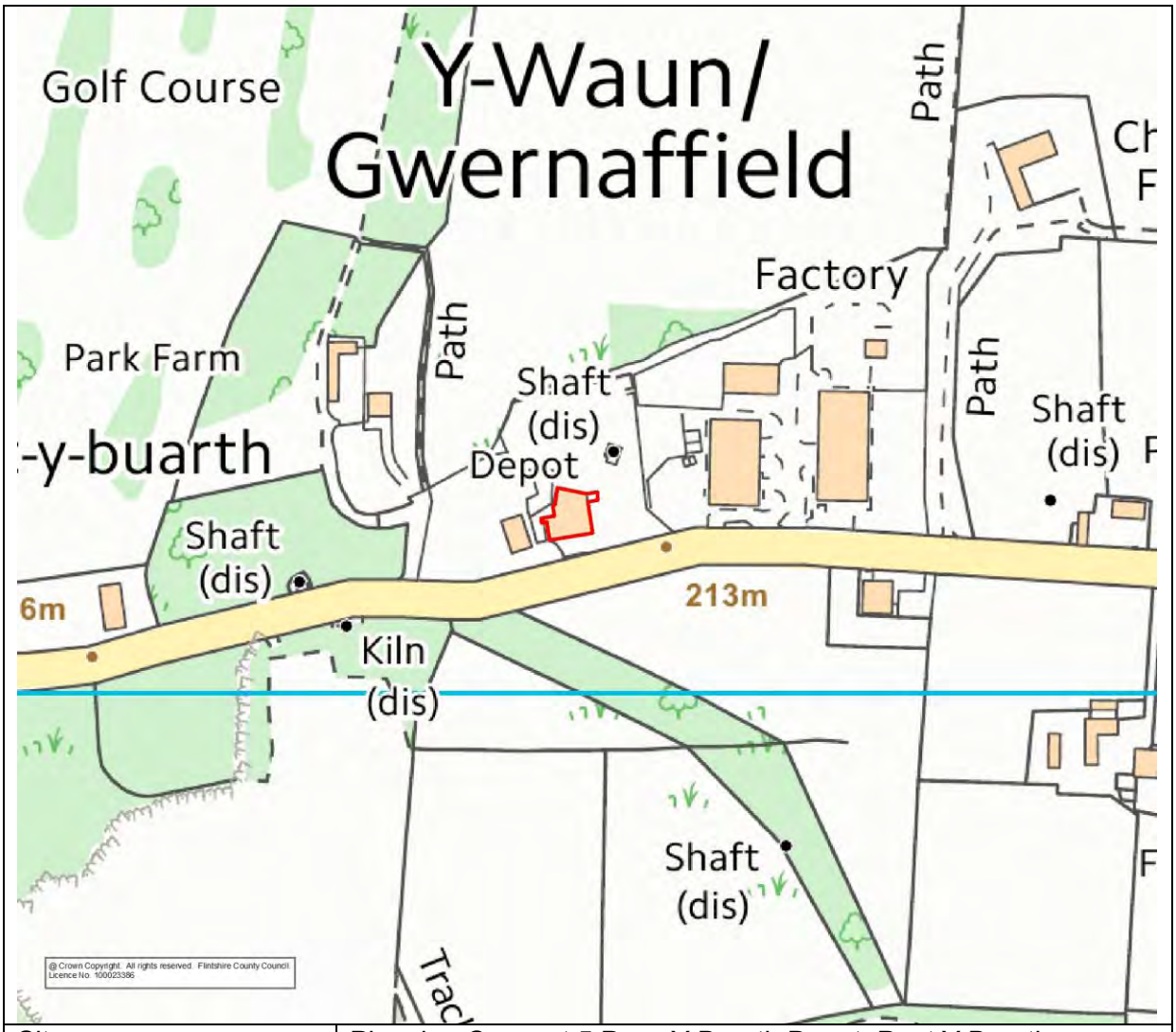
Site	Planning Consent 3 Corus Colours, Weighbridge Road, Deeside Industrial Park, Deeside
Owner	Tata
Agent	-
Size, ha	6.23
Market Availability	Not Available (Held as Expansion Land)
Planning Status	Full planning consent for the construction of a Sustainable Building Envelope Centre (App. Ref.: 047347)
Proposal	Construction of a 1,032 sqm office and research facility for Tata
Constraints	-
Comments	Within Deeside Enterprise Zone
Planning Issues	Identified within a Development Zone (Policy EM3) and Minerals Safeguarding (Policy MIN8)
Likely development potential	Office
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier
Serviced	Yes

Availability, years	1-3

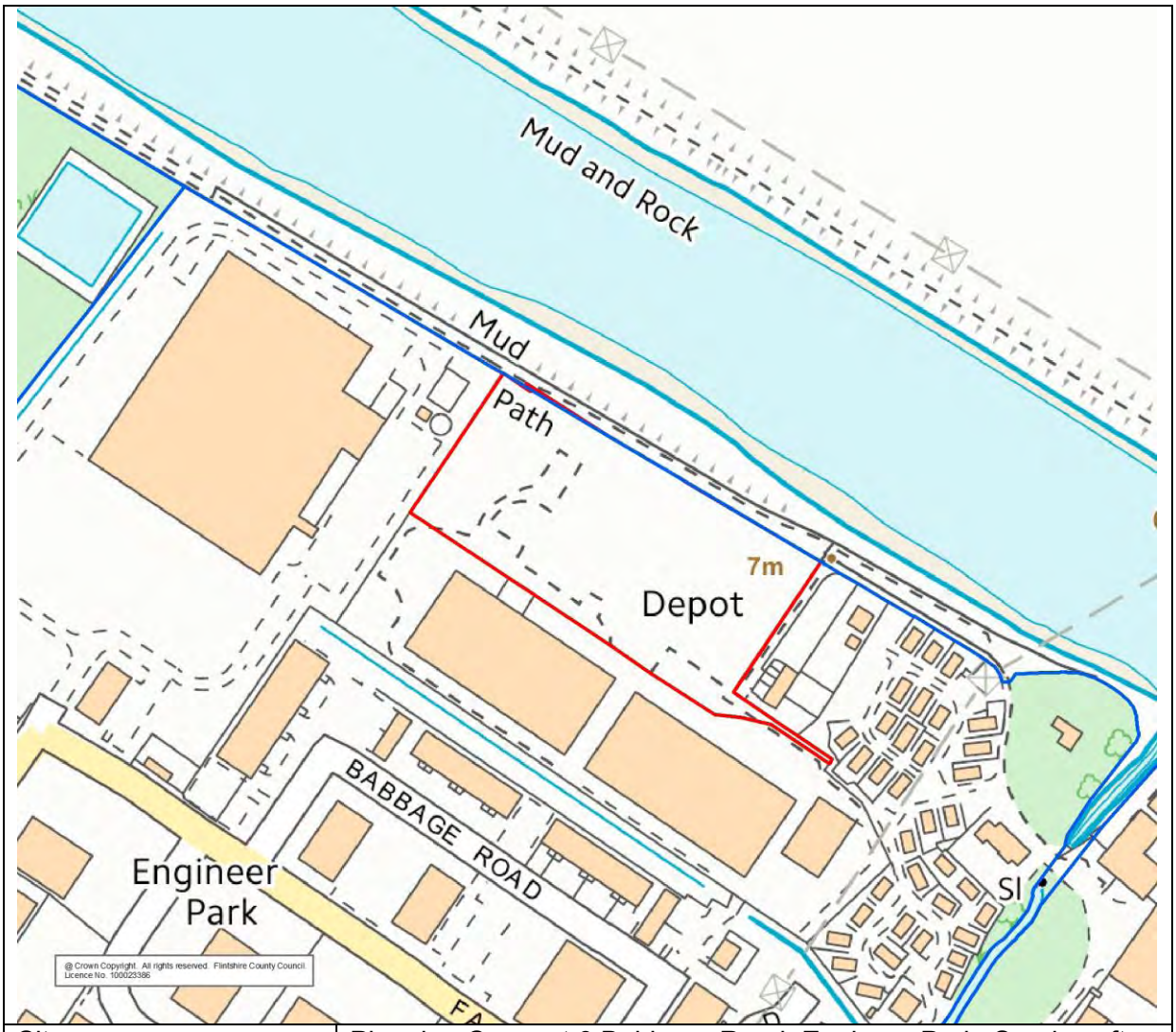


Site	Planning Consent 4 Site off Aber Road, Flint
Owner	Hollins Murray Group and Huws Gray
Agent	Craig Foster Architects
Size, ha	0.68
Market Availability	Not Available (Owner has Aspirations for Development)
Planning Status	Full planning consent for the construction of new builders merchant building with associated yard (App. Ref. 48078)
Proposal	Construction of a single storey builders merchant with a gross external floorspace of 1,290 sqm and an associated area of external storage/hardstanding of 3,250 sqm for the occupation of Huws Gray
Constraints	Trees onsite Swinchiard Brook bounds the site to the east, south east and to the north. Potential risks from the watercourse dealt with as part of the Flood Consequence Assessment of the associated planning consent.
Comments	Brownfield site is cleared and is currently in a semi-derelict condition
Planning Issues	Identified within Principal Employment Area (Policy EM3)
Likely development	Industrial

potential	
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier
Serviced	No
Availability, years	0-1

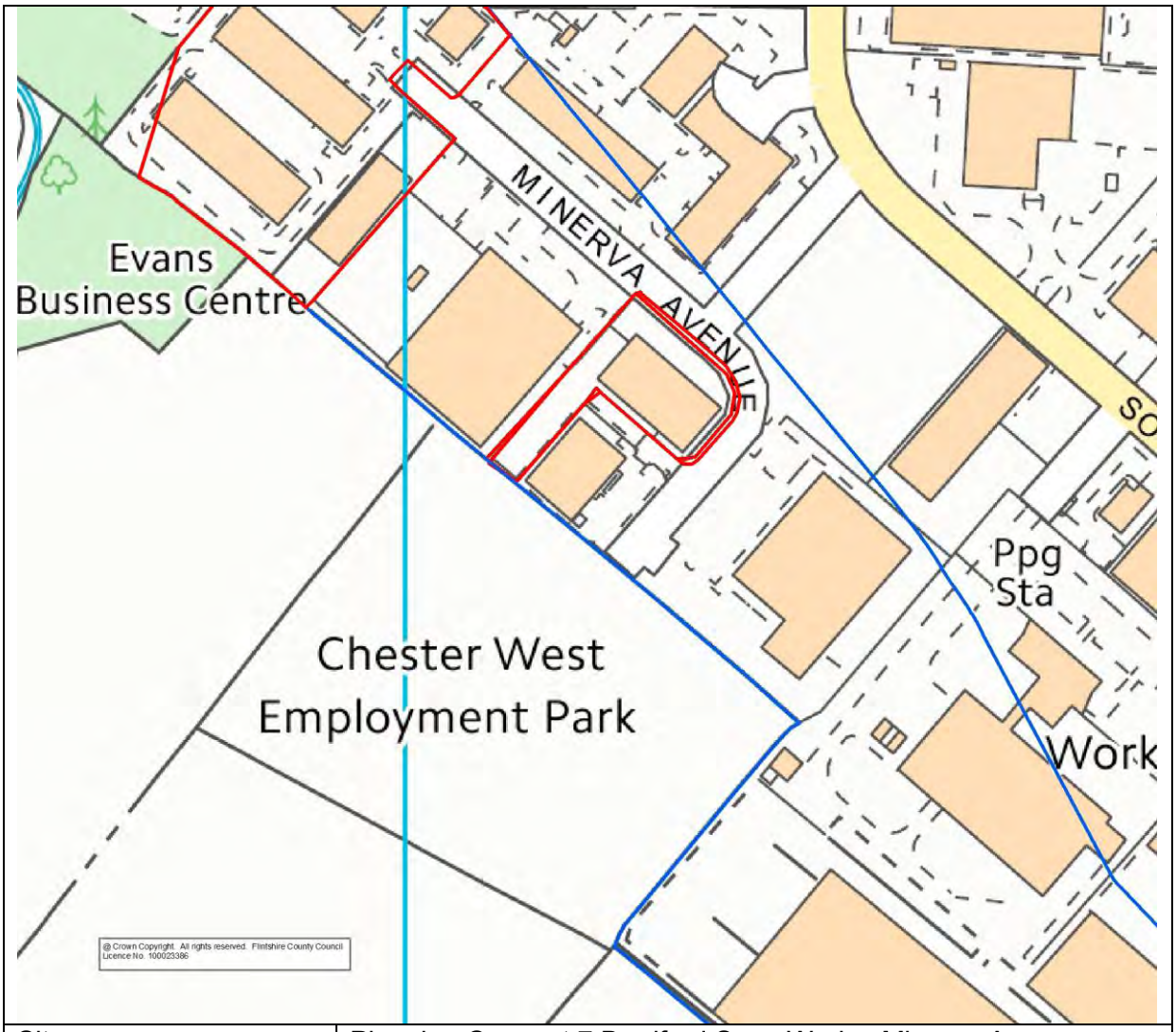


Site	Planning Consent 5 Pany Y Buarth Depot, Pant Y Buarth, Gwernaffield, Mold
Owner	A E Rowlands Plant Hire
Agent	JIG Architectural
Size, ha	0.34
Market Availability	Not Available (Owner has aspirations for development)
Planning Status	Full planning consent for the construction of new office and workshop extension (App. Ref. 46847)
Proposal	Erection of a 106 sqm two storey office extension and workshop alterations/extension of 43 sqm.
Constraints	-
Comments	-
Planning Issues	Identified within a Mineral Buffer Zone (Policy MIN10)
Likely development potential	Office/Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier
Serviced	Yes
Availability, years	0-1



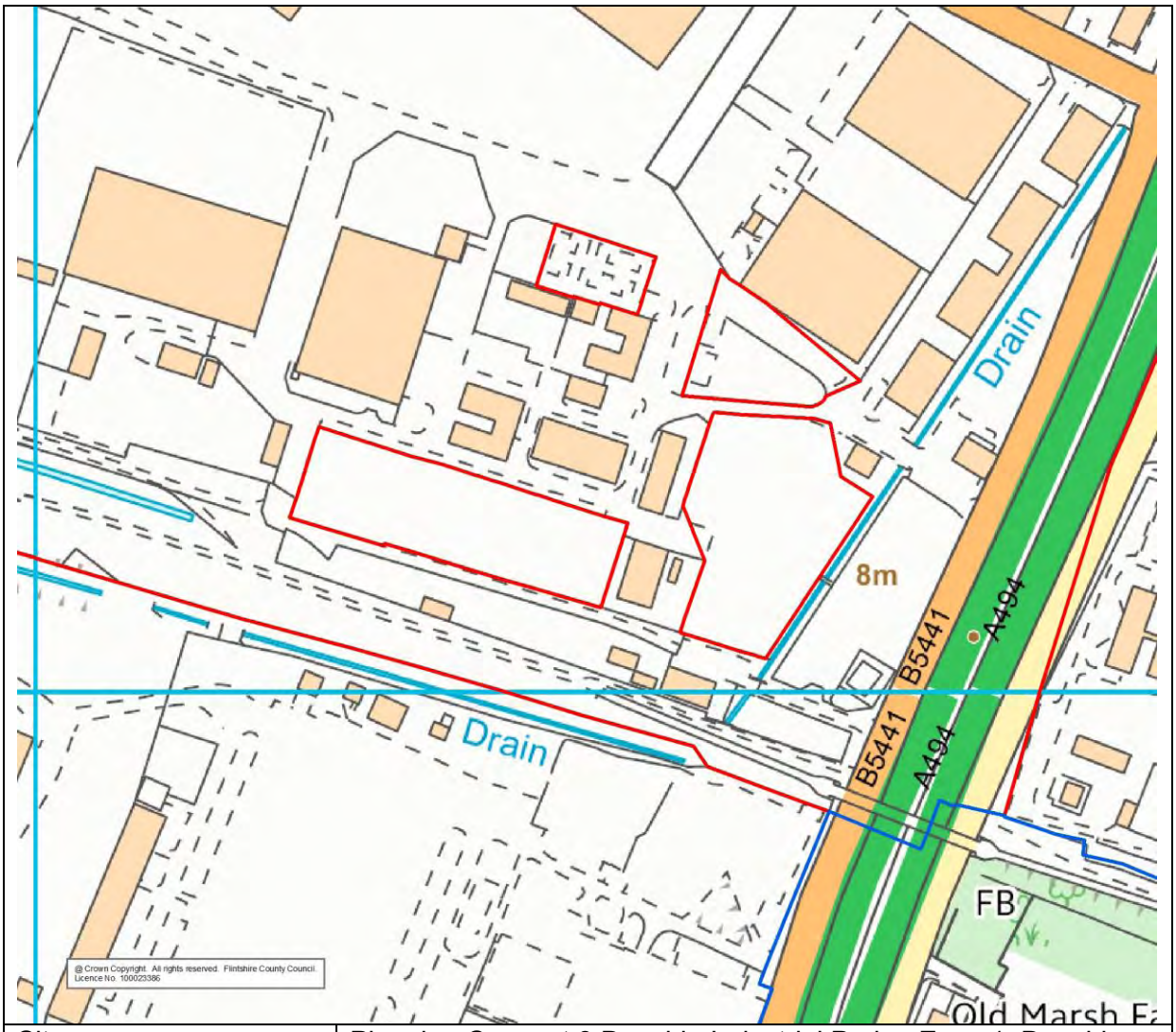
Site	Planning Consent 6 Babbage Road, Engineer Park, Sandycroft
Owner	Class Free
Agent	Martin Fletcher Architects
Size, ha	1.70
Market Availability	Available
Planning Status	Outline planning consent for seven light industrial units (App. Ref. 46940)
Proposal	Outline planning permission for seven light industrial units each of 1,000 sqm together with associated access, layout and parking for 156 cars. Subsequent application to extend period for the submission of reserved matters approved (App. Ref. 050517)
Constraints	Trees onsite
Comments	-
Planning Issues	Identified within Principal Employment Area (Policy EM3), Site of International Importance (Policy WB2), Statutory Site of National Importance (Policy WB3) and Minerals Safeguarding (Policy MIN8) to the north
Likely development potential	Industrial

Potential guidance market segment uses	General Business/Industrial Area Incubator/SME Cluster Site Site for Specific Occupier
Serviced	No
Availability, years	1-3



Site	Planning Consent 7 Bradford Soap Works, Minerva Avenue, Chester West Employment Park, Sealand
Owner	Bell Developments
Agent	Willacy Horsewood Partnership
Size, ha	0.34
Market Availability	Available
Planning Status	Full planning consent for the development of three light industrial units with associated parking and (App. Ref. 048296)
Proposal	Three light industrial units comprising one workshop unit of 372 sqm and two workshops units of 204 sqm, together with 20 car parking spaces.
Constraints	-
Comments	-
Planning Issues	-
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area Site for Specific Occupier
Serviced	No

Availability, years	1-3



Site	Planning Consent 8 Deeside Industrial Park – Zone 1, Deeside
Owner	Brightsea SARL c/o Reit Asset Management
Agent	CBRE/Legat Owen
Size, ha	1.90
Market Availability	Partly marketed as Zone 1 South
Planning Status	Change of use of land for open storage (App. Ref. 050123)
Proposal	Full planning consent for the change of use of four plots of vacant land for open storage for miscellaneous use including caravans
Constraints	-
Comments	Site is split across four plots extending to 1.9 ha of vacant land Three of the four plots, with planning consent for open storage, are being marketed. The north-eastern site benefits from planning permission, but is not being marketed Quoted price for marketed plots is £24,710/ha
Planning Issues	Identified within Principal Employment Area (Policy EM3)
Likely development potential	Industrial
Potential guidance market segment uses	General Business/Industrial Area

Serviced	No
Availability, years	5+

Appendix 6 – Wrexham and Flintshire Site Scoring System

Site Location and Access	Proximity to strategic highway network	• Site adjacent to primary route (strategic highways network or county route) - A55/A541/A548/A494/A550 junction (Flintshire) or A5/A483/A495/A534 junction (Wrexham) – score 10 • Site 0.5 km from primary route – score 9 • Site 1.0 km from primary route – score 8 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary route scores zero.
	Proximity to key cross country routes	Proximity to key cross country routes (A55 or A483/A5): • Site within 1.0 km from A55 or A483/A5 junction – score 10 • Site within 5.0 km from A55 or A483/A5 junction – score 6 • Site within 10.0 km from A55 or A483/A5 junction – score 3 • Site more than 10.0 km from A55 or A483/A5 junction – score 0.
	Prominence	• Site adjacent to, and visible from A55/A541/A548/A494/A550 junction (Flintshire) or A5/A483/A495/A534 junction (Wrexham) – score 10/9 • Site adjacent to, and visible from other dual carriageway – score 8/7 • Site adjacent to, and visible from other A road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
Planning Status		• If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0

	Constraints	May be physical (including access). planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		• Site available to develop within 0-1 year – score 10 • Site available to develop within 1-3 years – score 6 • Site available to develop 3-5 years – score 3 • Site available to develop 5+ years – score 0

Source: BE Group, 2014

Appendix 7 - Wrexham Sites Scoring Assessment

					Site Location and Access					Site Conditions							
Site/Plot Ref	Site or Plot Name	Settlement	Site Size, ha	Serviced	Strategic Highway Proximity	A483/A5 Proximity	Prominence	Public Transport	Planning Status	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability	Total	Market-led Sub-Total	Constraints
E1.39	Ruthin Road Development Area (Western Gateway)	Wrexham town	8.80	No	10	10	10	10	8	7	2	10	10	6	83	50	Trees onsite Various public footpaths pass through the site River Gwenfro pass through the site Various ecological issues, to be addressed through the provision of ecological mitigation land.
M	Ruabon Business Park, Adjacent A483	Ruabon	23.00	No	9	10	8	10	8	7	2	10	10	3	77	47	Various ecology issues – including breeding birds Footpaths cross the site Woodland onsite Pond in centre of site (to be retained in current proposal)
Hi	Bridge Road (Firestone site)	Wrexham Industrial Estate	26.00	No	4	3	3	5	8	7	8	8	10	10	66	28	Ecological issues including a number of protected species (ecological mitigation to be focussed on Site Hii).
E1.7	Bryn Road	Wrexham Industrial Estate	3.65	No	3	3	2	5	10	7	10	8	4	10	62	20	None
E1.22	Wynnstay Industrial Estate	Acrefair	1.40	No	7	6	6	10	4	7	8	10	4	0	62	33	Trees onsite
E1.23	Gresford Industrial Estate	Pandy	1.10	No	10	10	10	5	4	7	4	8	4	0	62	42	Site surrounds an electricity substation Much of site is wooded Housing adjacent
E1.10	Clywedog Road South (i)	Wrexham Industrial Estate	1.21	Yes (part)	4	3	3	5	10	10	10	8	2	6	61	20	None
Q	North of Tomlinson's Dairies, Pen y Palamant Farm	Minera	0.95	No	2	6	2	5	10	7	10	8	4	6	60	22	None
E1.20	Redwither (v)	Wrexham Industrial Estate	2.85	Yes	5	3	3	5	10	7	4	9	8	6	60	28	Site a) Bounded by Great Crested Newt exclusion fencing, ecological mitigation area on the northern boundary, trees onsite
P	Land at Minera Building Supplies, Five Crosses Industrial Estate	Minera	0.28	No	2	6	4	5	10	7	10	6	1	6	57	19	None
E1.35	Pandy Industrial Estate	Pandy	0.70	No	9	10	2	5	10	7	8	4	2	0	57	27	Trees onsite
E3	UDP Single User Site	Wrexham Industrial Estate	32.20	No	4	3	2	5	8	7	0	10	10	6	55	29	Trees onsite, with a dense block of woodland located east-west through the site Ponds and other watercourses Great Crested Newt Breeding Ponds Habitats for a range of protected species Close to various houses and farms
O	Westminster Industrial Estate	Gwersyllt	0.82	No	9	6	2	10	1	7	10	4	3	3	55	24	None
E1.2	Abenbury Way	Wrexham Industrial Estate	1.70	Yes	6	3	4	5	4	10	4	7	4	6	53	24	Various ecological issues including ponds (with Great Crested Newt Habitats), grassland habitats, bats, reptiles, birds and badgers Trees onsite Watercourses cross the edge of the site
E1.12	Clywedog Road South (iii)	Wrexham Industrial Estate	6.50	No	3	3	4	5	4	7	8	8	4	6	52	22	Irregular, linear shape
E1.14	Dunster Road	Wrexham Industrial Estate	0.80	No	4	3	3	5	10	7	8	6	3	3	52	19	Land in the north of the site may be undevelopable due to ecological constraints
E1.30	Llay Industrial Estate	Llay	0.47	No	3	6	4	5	10	7	10	6	1	0	52	20	None
K	Llay Industrial Estate (H)	Llay	0.80	No	3	6	4	5	10	7	10	6	1	0	52	20	None
E1.25	Llay Industrial Estate	Llay	3.30	No	3	6	4	5	4	7	2	8	6	6	51	27	Sloping Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation
E1.26	Llay Industrial Estate	Llay	2.90	No	3	6	4	5	4	7	2	8	6	6	51	27	Sloping Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation
E1.11	Clywedog Road South (ii)	Wrexham Industrial Estate	1.96	No	3	3	4	5	10	7	6	8	2	3	51	20	Trees on sites Watercourse passes along eastern edge of all three sites (to be retained as ecological mitigation)
E1.37	Rhosduu Industrial Estate	Wrexham town	0.90	No	4	6	3	10	4	7	6	5	6	0	51	24	Trees onsite Railway line adjacent
E1.4	Ash Road South (ii)	Wrexham Industrial Estate	7.30	No	5	3	3	5	4	7	0	9	8	6	50	28	Ponds on site (with Great Crested Newt Habitats). Up to half of the site may be required as ecological mitigation for the Newts, reducing the net developable area to 3.65 ha Woodland in the south (forms part of a wider Ancient Woodland area) Wildlife site to the west (Erlas Black Wood) which overlaps around Ash Road South Badgers reported onsite Habitat Directive constraints may make development here difficult Survey work underway here (and on other relevant sites in Wrexham Industrial Estate) with NRW funding to establish the full extent of the ecological constraints here
L	Former Brymbo Steelworks	Brymbo	8.00	No	1	6	4	5	1	7	8	9	8	0	49	28	Plateau site, with steeply sloping sites
E1.32	Coppi Industrial Estate	Rhos	0.40	No	3	6	4	5	10	7	8	4	2	0	49	19	Trees onsite
Hii	Bridge Road (Firestone site)	Wrexham Industrial Estate	20.10	No	4	3	3	5	8	7	0	8	10	0	48	28	A number of protected species recorded onsite Ponds onsite (including Great Crested Newt Habitats) Gas main crosses south of site Watercourses cross the site Environmental corridor associated with the Clywedog River to the south
E1.17	Redwither (ii)	Wrexham Industrial Estate	0.90	No	4	3	3	5	4	7	6	6	3	6	47	19	Trees onsite Footpaths cross the site
E1.19	Redwither (iv)	Wrexham Industrial Estate	0.90	No	4	3	3	5	4	7	6	6	3	6	47	19	Trees onsite Includes semi improved grassland, potentially up to half the land (0.45 ha) could be set aside as a wildlife corridor.
E1.21	Ridley Wood Road	Wrexham Industrial Estate	3.30	No	4	3	4	5	4	7	6	6	5	3	47	22	Trees onsite Watercourses cross the edges of the site
A	Abendbury Way (ii), JCB Expansion Land	Wrexham Industrial Estate	6.00	No	6	3	1	5	1	7	10	6	8	0	47	24	None
E1.13	Coed Aben Road	Wrexham Industrial Estate	0.17	No	5	3	3	5	4	7	8	4	1	6	46	16	Trees onsite
E1.8	Clywedog Road North	Wrexham Industrial Estate	1.90	No	4	3	3	5	4	7	2	8	3	6	45	21	Ecological issues – Part broadleaved ancient woodland. Is in key ecological network location Not possible to develop woodland area, which would make remainder of site difficult to develop In floodrisk area Watercourses cross the site
E1.29	Llay Industrial Estate	Llay	1.20	No	3	6	4	5	4	7	6	4	4	0	43	21	Trees onsite Various footpaths cross the site
E1.15	Former Tetra Pak	Wrexham Industrial Estate	2.90	No	2	3	3	5	4	7	4	10	5	0	43	23	Trees onsite Various footpaths cross the site Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this retained as an ecological mitigation site

Site/Plot Ref	Site or Plot Name	Settlement	Site Size, ha	Serviced	Site Location and Access				Planning Status	Site Conditions				Site Availability	Total	Market-led Sub-Total	Constraints
					Strategic Highway Proximity	A483/A5 Proximity	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility				
G	Redwither Road(i)	Wrexham Industrial Estate	0.99	No	6	3	4	5	1	7	4	8	4	0	42	25	Forms part of a wildlife corridor Significant tree coverage on site (broad leaved woodland, possibly including a rare fruit tree). Council Ecologist view is that this site would make an ideal ecological reserve area.
E1.28	Llay Industrial Estate	Llay	1.40	No	3	6	4	5	4	7	0	8	4	0	41	25	Landlocked site with unclear ownership, may not be developable Trees onsite Ponds in this area (will need surveying for Great Crested Newts) An (as yet undetermined) portion of land will need to be retained for ecological mitigation Land is bounded by existing businesses in the south and Sharp's landholdings in the north, providing a separate access would be difficult
E1.9	Clywedog Road East	Wrexham Industrial Estate	2.20	No	4	3	3	5	4	7	4	8	3	0	41	21	Frontage screened by trees Bridge Road frontage in use for HGV parking by Hydro Aluminium Identified as an ideal site to form part of the Wrexham Industrial Estate Wildlife Network. If this option was realised around 40 percent of the site could be retained for ecological mitigation, reducing the net developable area to 1.32 ha.
E1.31	Llay Industrial Estate	Llay	6.40	No	2	6	2	5	4	7	0	9	5	0	40	24	Trees onsite Multiple ownerships Backland site, any access to Llay Industrial Estate would have to pass through the ownerships of existing businesses Great Crested Newts possibly present on edge of site.
F	Redwither Road(ii)	Wrexham Industrial Estate	0.74	No	4	3	3	5	1	7	4	6	3	3	39	19	Watercourse crosses the site (forms part of a wildlife corridor) Flood risk area Trees onsite
C	Coed Aben Road (ii & iii)	Wrexham Industrial Estate	1.70	No	5	3	3	5	4	1	2	4	5	6	38	20	Small pond and wet area to the rear Central part of site comprises short perennial and semi improved grassland. Grizzled Skipper Butterflies and Great Crested Newt recorded on site Council Ecologist view is that the central area of the site (some 0.55 ha) should be retained, for ecology, leaving the north and south of the site (1.15 ha) available for development
N	Buildings 5&6, Plas Power Colliery	Southsea	0.31	No	3	6	4	5	1	7	4	6	1	0	37	20	Vacant buildings on site benefit from listed building status and curtilage listed status Potential of contamination requiring ground investigation Trees on site
E1.24	Vauxhall Industrial Estate	Johnstown	0.71	No	6	6	1	5	4	7	2	3	2	0	36	18	Site b) Trees onsite Site c) Site of ecological value (Monks Pool) to the south Stryt Las A'r Hafod Site of Special Scientific Interest to the east, further ecological surveys would be required prior to any development Sites a and c are backland sites which cannot be independently accessed from the industrial estate roads
E1.6	Bryn Cottages	Wrexham Industrial Estate	3.60	No	1	3	3	5	4	7	2	6	2	0	33	15	Trees onsite Irregular 'L-shaped' site Housing adjacent Grizzled Skipper Butterfly recorded on site
B	Cefn Park, Redwither Road	Wrexham Industrial Estate	11.50	No	1	3	3	5	1	3	0	4	8	0	28	19	Part of a wider wildlife site, extending south to the River Clywedog, and is now considered undevelopable due to multiple ecological constraints Pylons cross the site Trees onsite Various footpaths cross the site Remains of multiple small buildings on the site

Appendix 8 - Flintshire Sites Scoring Assessment

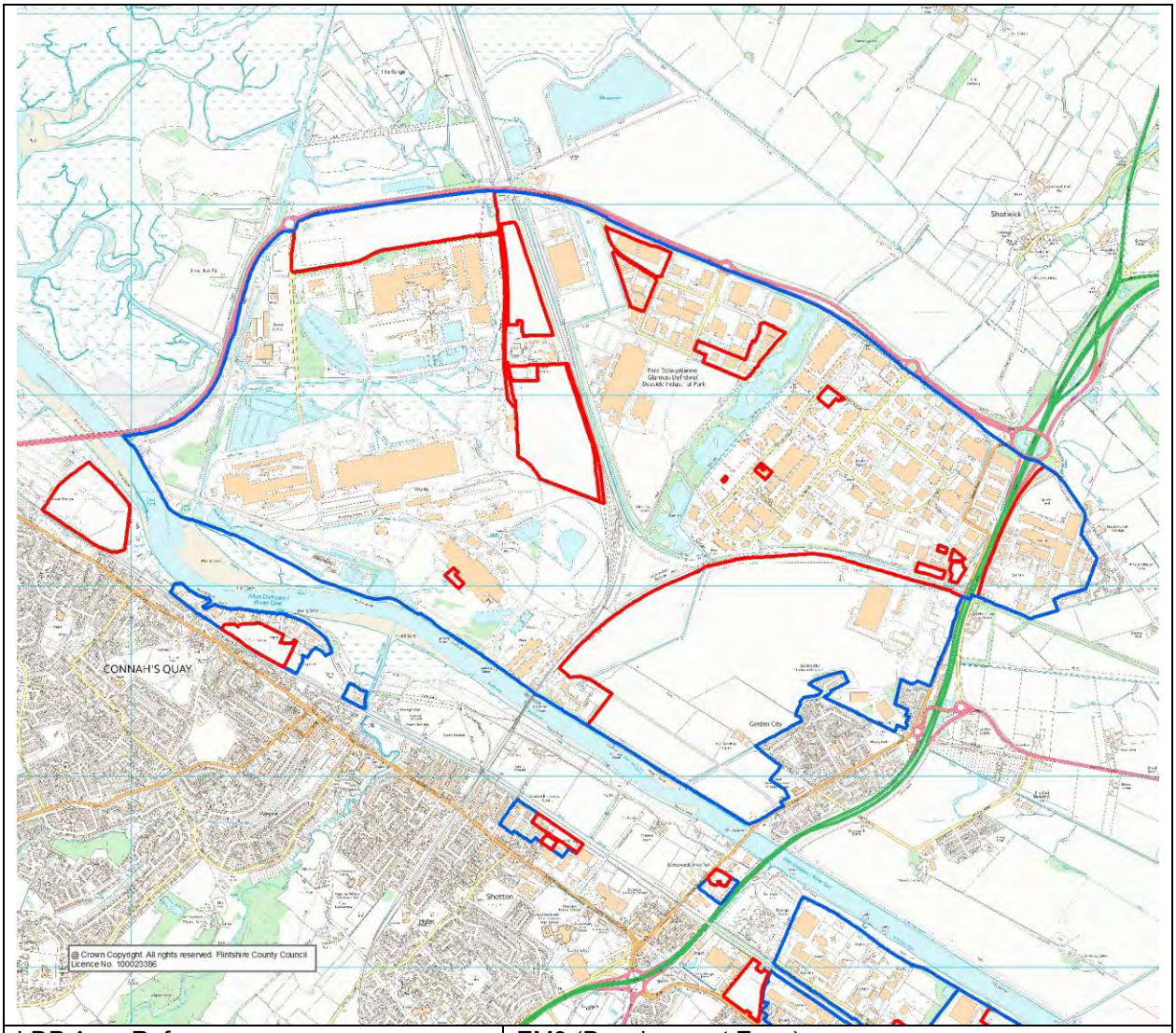
					Site Location and Access					Site Conditions								
Site/Plot Ref	Site or Plot Name	Settlement	Site Size, ha	Serviced	Strategic Highway Proximity	A55 Proximity	Prominence	Public Transport	Planning Status	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability	Total	Market-led Sub-Total	Constraints
EM2.1	Warren Hall	Broughton	36.50	No	9	10	9	5	8	7	8	10	10	3	79	48	Trees on site
EM1.1	Chester Aerospace Park	Broughton	9.00	Yes	4	6	3	5	10	10	8	8	10	6	70	31	Airbus runway and related facilities adjacent. Development will require consultation with Airbus.
EM1.7	Former Power Station	Connahs Quay	12.80	No	9	3	2	5	4	7	2	3	19	0	54	36	In flood risk area Remains of various cleared buildings and roadways on the site. Electricity pylons cross edge of site Railway line adjacent
EM1.26	Rowley's Drive	Shotton	0.70	No	8	6	4	10	4	7	6	5	3	6	59	26	Trees on site Adjacent to railway
Plan App. 2	Airbus II, Chester Road	Broughton	6.36	Yes	6	6	3	5	10	10	10	7	8	6	71	30	None
Plan App. 1	Airbus I, Chester Road	Broughton	1.03	Yes	6	6	3	5	10	10	10	7	4	6	67	26	None
EM1.2	Manor Lane/Hawarden Park Extension	Broughton	18.20	No	6	6	4	5	8	3	4	10	10	3	59	36	Flight path limitations for Hawarden Airport serve to render the easternmost parts of the site undevelopable. Possible habitat issues on Chester Road frontage. Potential constraints on electricity supply
EM1.3	Mount Pleasant Road (north)	Buckley	2.00	Yes	7	6	3	5	10	10	10	5	4	10	70	25	None
EM1.5	Drury New Road	Buckley	1.40	No	8	10	3	10	4	7	8	9	4	6	69	34	Trees onsite
EM1.4	Land North of Buckley Station	Buckley	0.60	No	8	10	6	10	4	7	6	8	3	0	62	35	Adjacent to railway line Bounded by trees
EM1.8	Crumps Yard, Dock Road	Connahs Quay	3.45	No	4	3	1	0	4	7	4	4	5	6	38	17	Access via low bridge Remains of buildings on site Trees on site
EM1.12	Land to North West of Garden City	Deeside	98.00	No	9	6	4	10	10	7	8	10	10	0	74	39	In flood risk area
EM1.10	Land to North of Shotton Paper	Deeside	24.00	No	10	0	10	5	4	7	8	5	10	3	62	35	Pond on site
EM1.11	Land East of Shotton Paper	Deeside	32.00	Yes (part)	9	0	4	5	10	10	0	5	10	6	59	28	None
Plan App. 8	Deeside Industrial Park – Zone 1	Deeside	1.90	No	8	3	7	5	10	7	10	5	2	0	57	25	None
Plan App. 3	Corus Colours, Weighbridge Road, Deeside Industrial Park	Deeside	6.23	Yes	1	0	2	0	10	10	10	3	8	6	50	14	None
EM2.3	St David's Park	Ewloe	0.80	No	9	10	4	10	4	7	10	9	3	3	69	35	None
Plan App. 4	Site off Aber Road	Flint	0.68	No	10	6	9	10	10	7	4	6	2	10	74	33	Brownfield site is cleared and is currently in a semi-derelict condition Trees on site Swinchiard Brook bounds the site to the east, south east and to the north. Potential risks from the watercourse dealt with as part of the Flood Consequence Assessment of the associated planning consent.
EM1.15	Greenfield Business Park, Phase III	Greenfield	4.40	No	10	0	10	5	4	7	0	4	3	3	46	27	Trees on site Eastern site includes remains of buildings Two sites are divided by a railway line Amenity site adjacent to eastern area Flood risk potential to eastern site
EM1.13	Greenfield Business Park, Phase I	Greenfield	1.30	Yes	9	0	2	5	4	7	4	4	4	3	42	19	Backland with constrained access Trees on site Railway adjacent
EM1.14	Greenfield Business Park, Phase II	Greenfield	1.20	Yes	9	0	2	5	10	10	2	2	2	0	42	15	Northern site is contaminated Some access roads are unadopted Potential flood risk Remains of buildings on northern site
EM1.16	Greenfield Business Park (III) Extension	Greenfield	6.60	No	9	0	2	5	4	7	2	4	5	0	38	20	Flood risk area Marshy/uneven ground Railway adjacent Amenity site adjacent
EM1.17	Broncoed Industrial Estate	Mold	0.70	Yes	9	0	4	5	10	10	10	8	2	5	63	23	None
Plan App. 5	Pany Y Buarth Depot, Pant Y Buarth, Gwernaffield	Mold	0.34	Yes	7	0	2	5	10	10	10	8	1	10	63	18	None
EM1.18	Mold Business Park	Mold	5.30	No	7	0	3	0	8	7	4	9	5	6	49	24	Trees on site Stream passes through eastern site Various other watercourses pass through both sites
EM2.4	Mold Business Park Extension	Mold	5.00	No	7	0	3	0	4	7	2	9	5	0	37	24	Trees on site Various watercourses cross the site Flood risk Uneven site
EM1.19	Adjacent Mostyn Docks	Mostyn	3.00	No	9	0	9	5	4	7	2	6	4	6	52	28	In a floodrisk area Existing buildings and car park onsite Trees onsite Ecological issues along River Dee shore
EM1.21	Chester Road East	Queensferry	3.50	No	9	6	4	10	4	7	8	6	5	6	65	30	Adjacent to railway line
EM1.22	Antelope Industrial Estate	Rhydymwyn	1.10	Yes	10	0	10	5	4	10	8	8	3	0	58	31	Ecological issues
EM1.24	Land East of Saltney Ferry Road	Saltney	14.60	No	5	6	3	5	8	7	4	9	8	3	58	31	Flood risk Poor access to the south Trees on site
EM1.23	River Lane	Saltney	1.10	No	6	6	4	5	4	7	6	5	3	6	52	24	Constrained access to River Lane Flood risk
Plan App. 6	Babbage Road, Engineer Park	Sandycroft	1.70	No	4	3	1	0	10	7	8	4	3	6	46	15	Trees onsite
EM1.25	Prince William Avenue	Sandycroft	1.80	No	6	3	1	0	4	7	8	4	4	6	43	18	Trees on site
EM2.2	DARA Site	Sealand	18.50	Yes	9	10	9	5	4	10	2	6	8	0	63	42	Coherent redevelopment here would be difficult Existing buildings on site; some still in use Possible contamination from historic uses Trees on site

Site/Plot Ref	Site or Plot Name	Settlement	Site Size, ha	Serviced	Site Location and Access				Planning Status	Site Conditions				Site Availability	Total	Market-led Sub-Total	Constraints
					Strategic Highway Proximity	A55 Proximity	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility				
Plan App. 7	Bradford Soap Works, Minerva Avenue, Chester West Employment Park	Sealand	0.34	No	9	0	2	5	10	7	10	5	1	6	55	17	None

APPENDIX 9 – FLINTSHIRE EMPLOYMENT AREA PROFORMAS

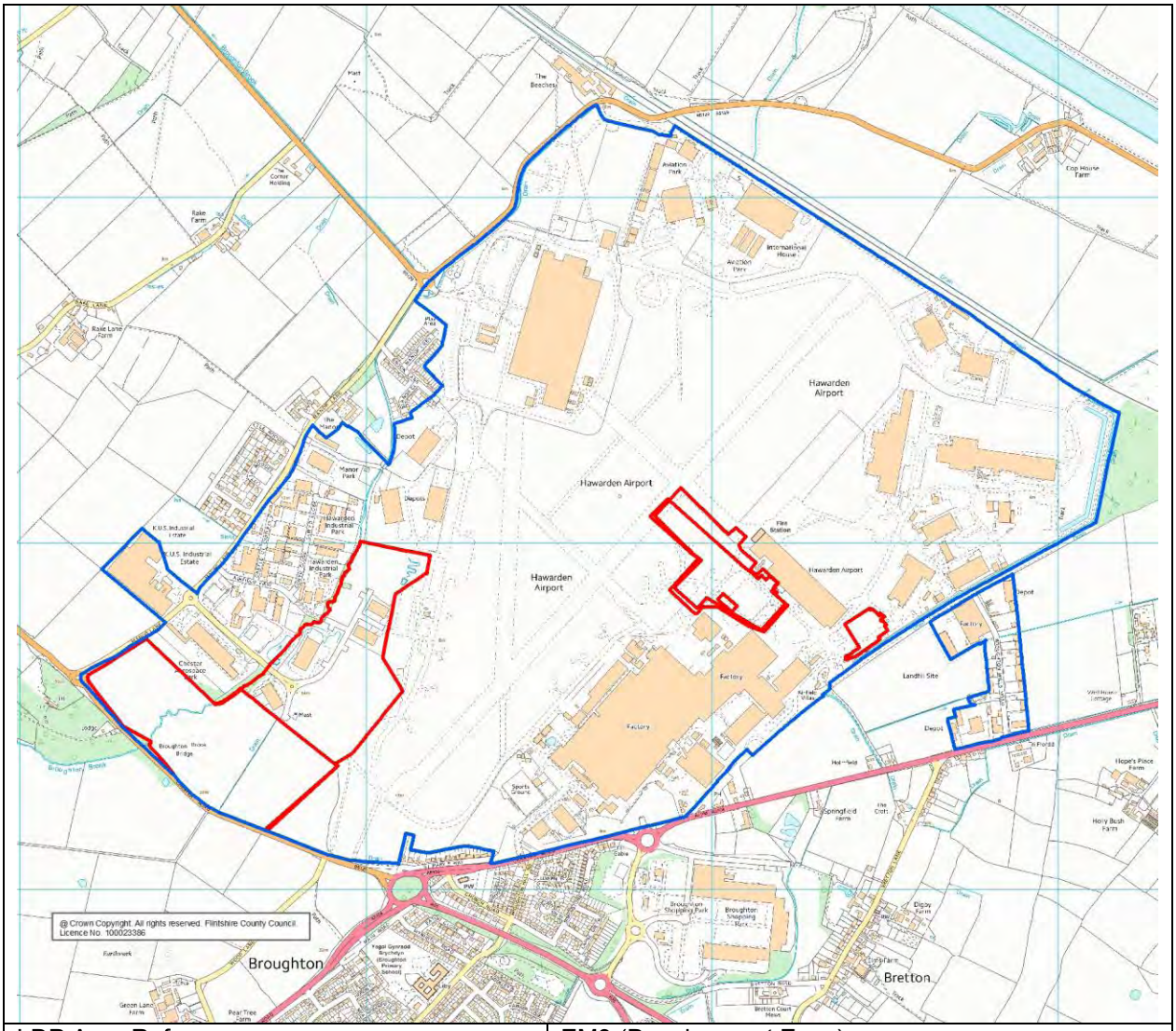
The employment area proformas relate to areas of developed land and buildings, in B1/B2/B8 use (i.e. the industrial estates and business parks) in the County. All are allocated for employment purposes in Policy EM3 – 'Development Zones and Principal Employment Areas' of the Unitary Development Plan. These proformas are linked to the analysis in Section 6.0 of the main Joint Employment Land Review document.

The employment area proformas are different to the Employment Site Proformas included at Appendix 5, in that the latter refers to undeveloped land (or significant redevelopment opportunities), which are allocated for employment purposes primarily under Policy EM1 of the Unitary Development Plan.



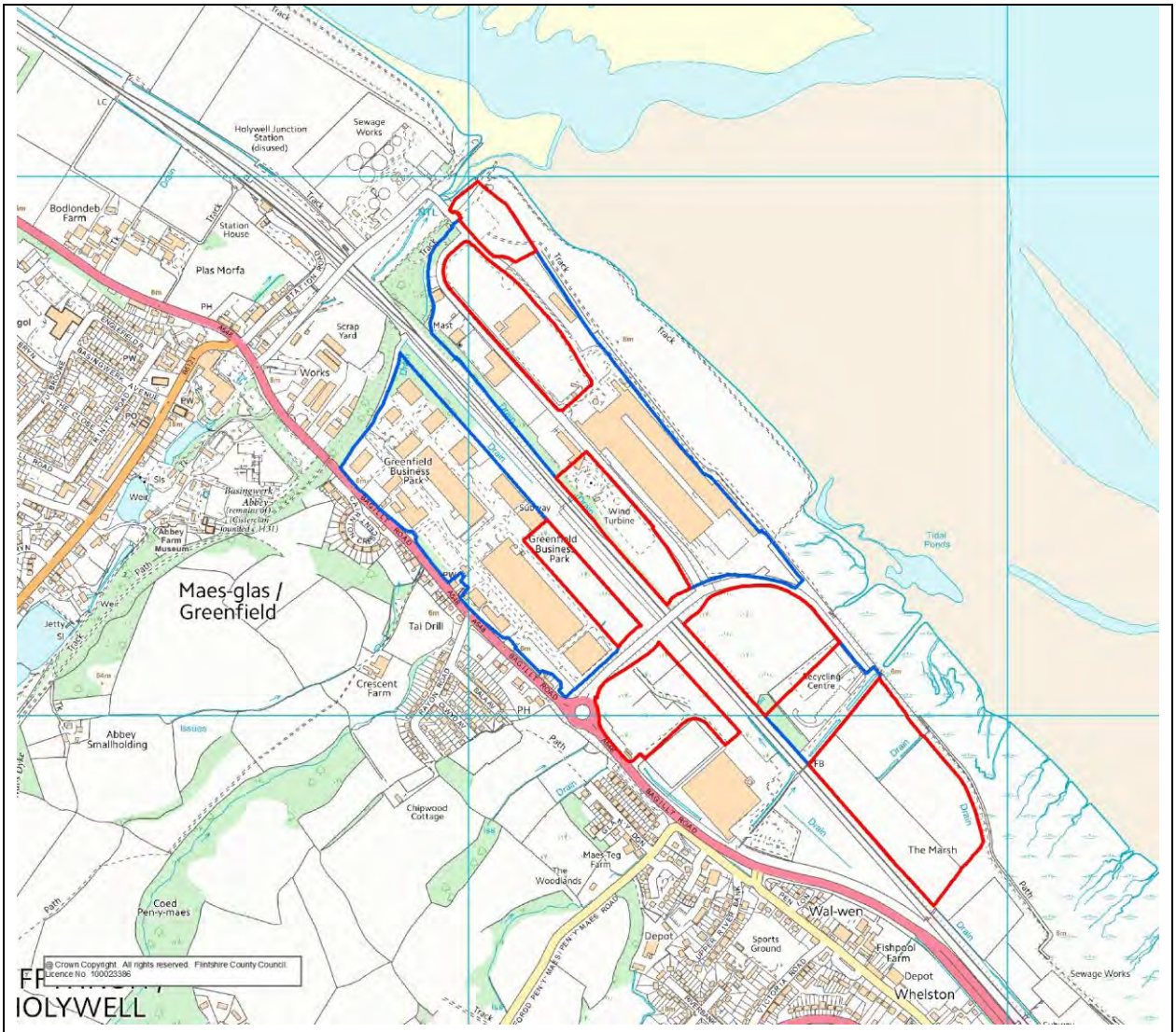
LDP Area Reference	EM3 (Development Zone)
Name	Deeside Development Zone
Description	Major development and Enterprise Zone in North East Wales, prominently located on the England/Wales boundary and extending across some nine square kilometres. Generally comprises major industrial and infrastructure complexes in the west with a range of smaller industrial units in the east and a large mixed-use development site in the south east
Key Occupier(s)	UPM Shotton, Toyota, BASF, Tata
Prominence	Good
Current Use (Use Classes)	B1 (Classes II and III), B2, B8, A1, A3, Sui Generis
Size, ha	930.00
Building Age	Pre-1945, 1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	In a Minerals Safeguarding Area (Policy MIN8) Green Barrier (Policy GEN4) land to the north and east Areas of high landscape quality associated with the Dee Estuary (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the south and west Housing to the south east Various waterbodies and areas of marshland in the area In a flood risk area

Critical Mass	Good
Opportunities for redevelopment/ expansion	Development opportunities within the Development Zone are well established and include the following allocated employment sites: • EM1.10 Land to North of Shotton Paper, Deeside (24.00 ha) - Held as expansion land for UPM Shotton • EM1.11 Land East of Shotton Paper, Deeside (32.00 ha) – Northern site identified for a Deeside Energy Recovery Facility (energy from waste). Southern site developed for convertor station • EM1.12 Land to North West of Garden City, Deeside (98.00 ha) – Proposed for a major mixed-use development • EM2.2 DARA Site, Sealand (18.50 ha) - Range of former military buildings on the site; some still occupied by private companies. Overall some 172.50 ha, 18.5 percent of the total area, comprises allocated employment land. Other unused land in the Development Area, is within the secure curtilage of Deeside Power Station, UPM Shotton and other large occupiers or is waterlogged/marshy.
Other Information	Outside of a settlement area An Enterprise Zone An Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average **Total Grade: A** Development area and Enterprise Zone of regional and national significance. Deeside Development Zone is already home to a many of Flintshire's major employers and a range of major developments are now underway on the Zone's allocated employment sites, many associated with its Enterprise Zone Designation. The Council should therefore continue to protect Deeside Development Zone in the emerging LDP and ensure that mixed-use proposals here deliver the maximum amount of B-Class employment, to protect the integrity of the Zone as a regional employment location.



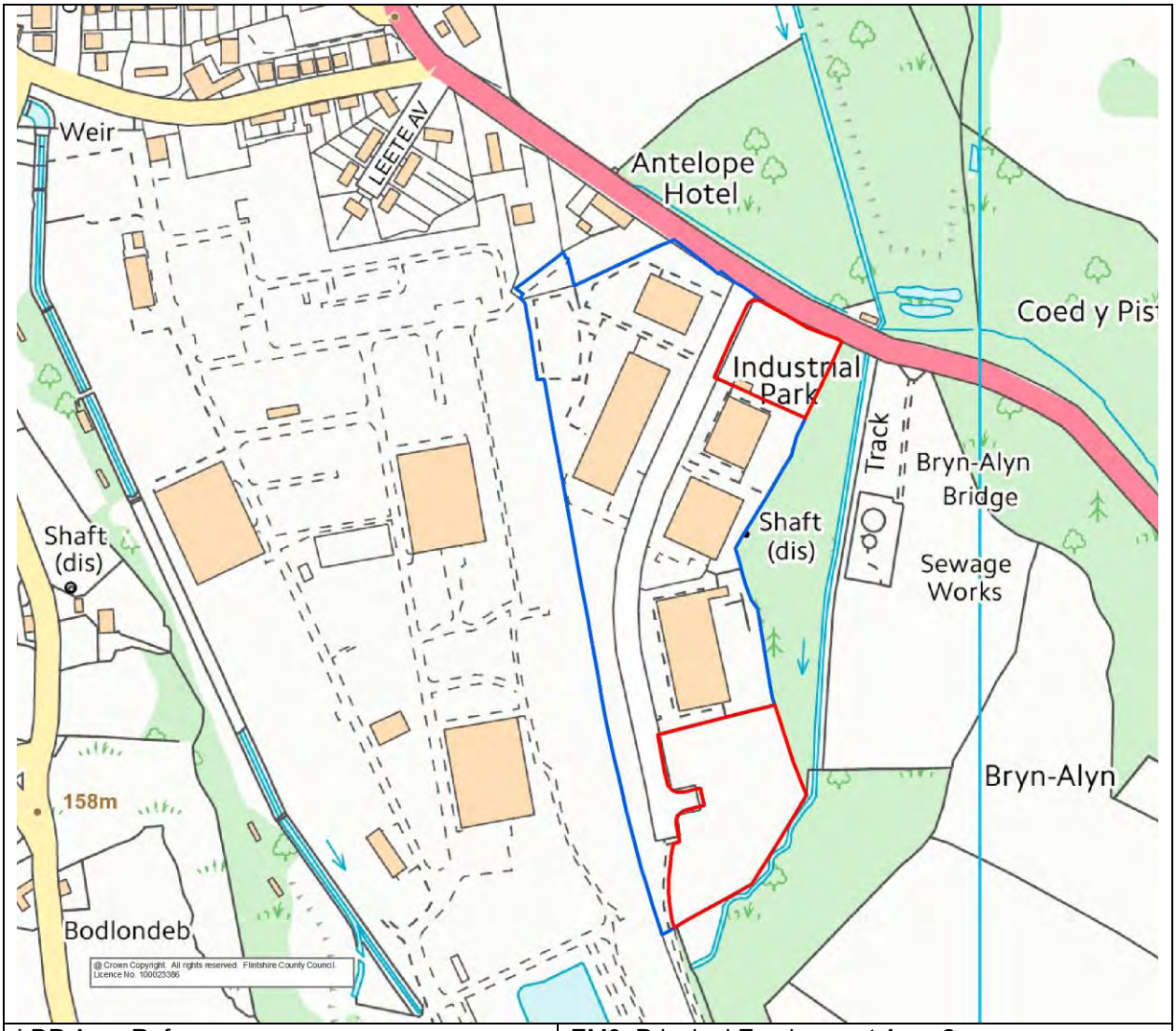
LDP Area Reference	EM3 (Development Zone)
Name	Hawarden Industrial Park, Chester Aerospace Park and Airport Development Zone (Airbus), Broughton
Description	Major manufacturing facility for Airbus including active airport facilities. Area also includes a modern industrial estate in the west which is continuing to grow, in part at least, as a supplier park for Airbus and retains some 27.2 ha of expansion land.
Key Occupier(s)	Airbus, Davis Bakery, SIRA Test and Certification, AL Control Laboratories, Marshalls
Prominence	High
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	355.00
Building Age	Pre-1945, 1945-1990, 1990-2000, 2000+
Building Quality	Good
Constraints	Green Barrier Land (Policy GEN4) to the east
Critical Mass	Good

Opportunities for redevelopment/ expansion	Land within the 300 ha Airbus wing manufacturing plant will remain in use for that company. As is discussed in Section 7.0 of the Main Report, the company has various minor plans for remodelling and redevelopment, but the larger growth plans have been completed over the last 15 years. Further growth will be focused at Chester Aerospace Park where 27.2 ha of expansion land is identified in employment sites EM1.1 and EM1.2. These are prime sites suitable for attracting inward investment into the County and at least one investment (SIRA Test and Certification) has been secured and is under development at present.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: A** Major manufacturing premises for the County's largest employer an extensive existing industrial estate and a growing manufacturing and supplier park. The whole should be strongly protected in the emerging LDP. The remaining expansion land should be protected to meet the needs of large businesses, including inward investors, looking to move into the area.



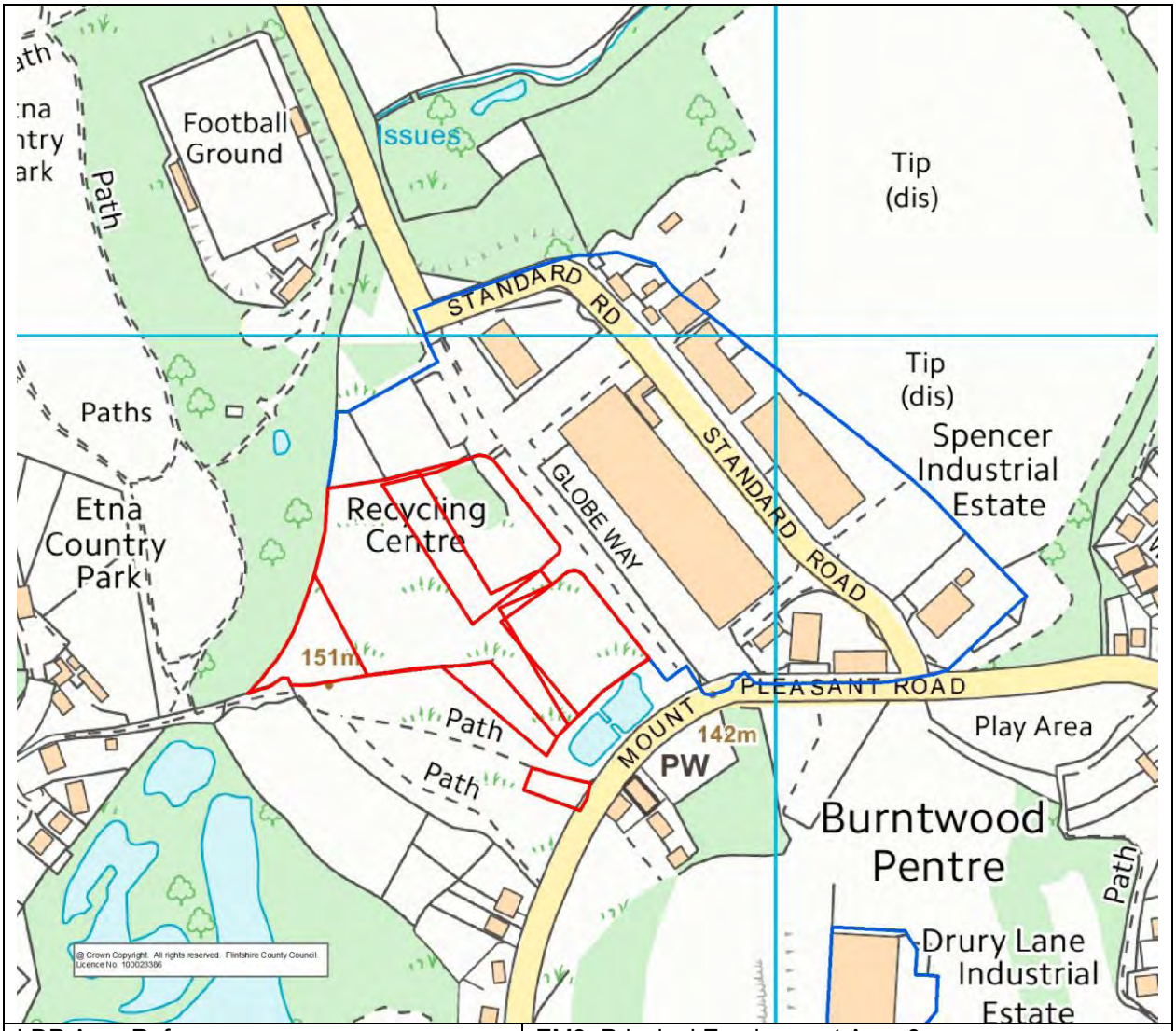
LDP Area Reference	EM3, Principal Employment Area 1 and 10
Name	Greenfield Business Park, Greenfield
Description	Large established industrial area divided into four sections by the railway and raised access roads. Includes a scheme of smaller industrial premises in the north west and larger logistics/manufacturing properties elsewhere. The employment area includes some six parcels of vacant brownfield land which are allocated as employment sites in the UDP.
Key Occupier(s)	Kingspan, Saffil Automotive, Westbridge Furniture, Hall's Drinks, R J Jones Group
Prominence	Good
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	70.24
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average

Constraints	Divided into four sections by the railway and raised access roads In a Minerals Safeguarding Area (Policy MIN8) Areas of high landscape quality associated with the Dee Estuary (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the east Tourism area to the north (Policies T4/9) – Greenfield Marina Area is divided by Safeguarded Road Scheme (Policy AC17)
Critical Mass	Good
Opportunities for redevelopment/ expansion	The area includes four allocated employment sites (which comprise six undeveloped plots): • EM1.13 Greenfield Business Park, Phase I, Greenfield (1.30 ha) – To the rear of Westbridge Furniture, and likely to be expansion land for this business • EM1.14 Greenfield Business Park, Phase II, Greenfield (1.20 ha) – Much of the land is in use for lorry parking and open storage • EM1.15 Greenfield Business Park, Phase III, Greenfield (4.40 ha) • EM1.16 Greenfield Business Park (III) Extension, Greenfield (6.60 ha). Expansion elsewhere is prevented by surrounding uses and the Dee Estuary.
Other Information	Within a settlement area An Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Good Environment: Average **Total Grade: B** Large, mixed employment area accommodating a number of major employers within the County, several of which have recently expanded and may grow further in the medium term. Also provides extensive small business accommodation, including budget offices. There is 13.5 ha of undeveloped allocated employment land here, including sites to meet the needs of major businesses. Both these sites, and the wider employment area, should be strongly protected in the emerging LDP for B Class employment.



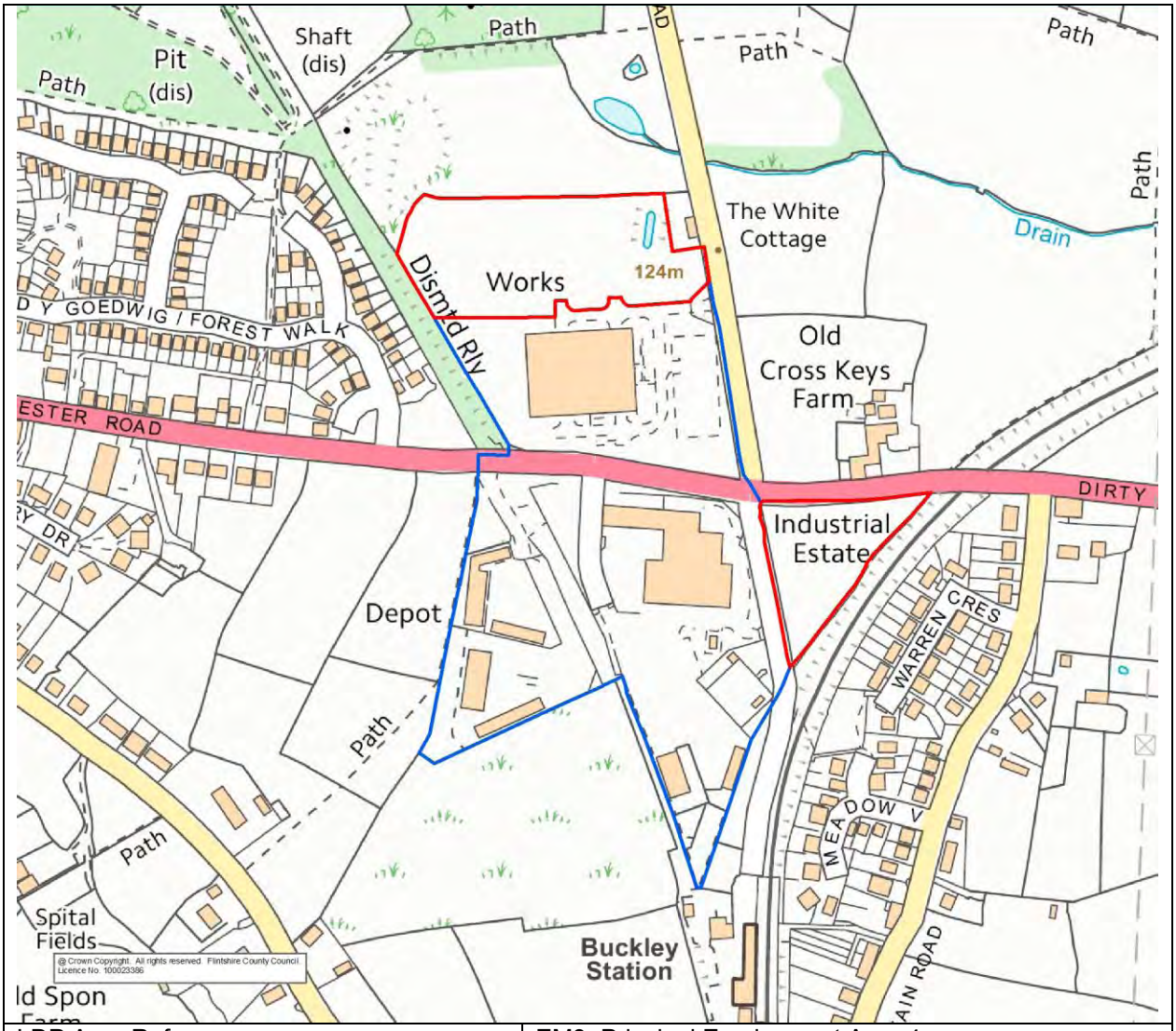
LDP Area Reference	EM3, Principal Employment Area 2
Name	Antelope Industrial Park, Rhydymwyn
Description	Linear employment area comprising a small group of moderate quality, mid-sized industrial units in a low density estate extending south from the Rhydymwyn settlement boundary.
Key Occupier(s)	CRT Recycling, The Mold Hygiene Chemicals Company
Prominence	Average
Current Use (Use Classes)	B1 (Class II), B2, B8
Size, ha	4.95
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	In a Minerals Safeguarding Area (Policy MIN8)
Critical Mass	Average

Opportunities for redevelopment/ expansion	There is one allocated employment sites within the area of 1.10 ha (EM1.22 Antelope Industrial Estate) – The site is being held to meet the expansion needs of existing businesses within Antelope Industrial Estate. To the west is the Rhydymwyn Valley Works, a former MoD research facility, now abandoned. However, the Works is now a nature reserve and the remaining buildings protected, so it is assumed that it would not be possible to extent Antelope Industrial Park into this site. The Park is bounded by woodland and a sewage works to the east and south.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: C** A small but good quality industrial estate, serving the rural west of the County where there are few other employment areas. Antelope Industrial Park should be protected in the emerging LDP for B Class employment



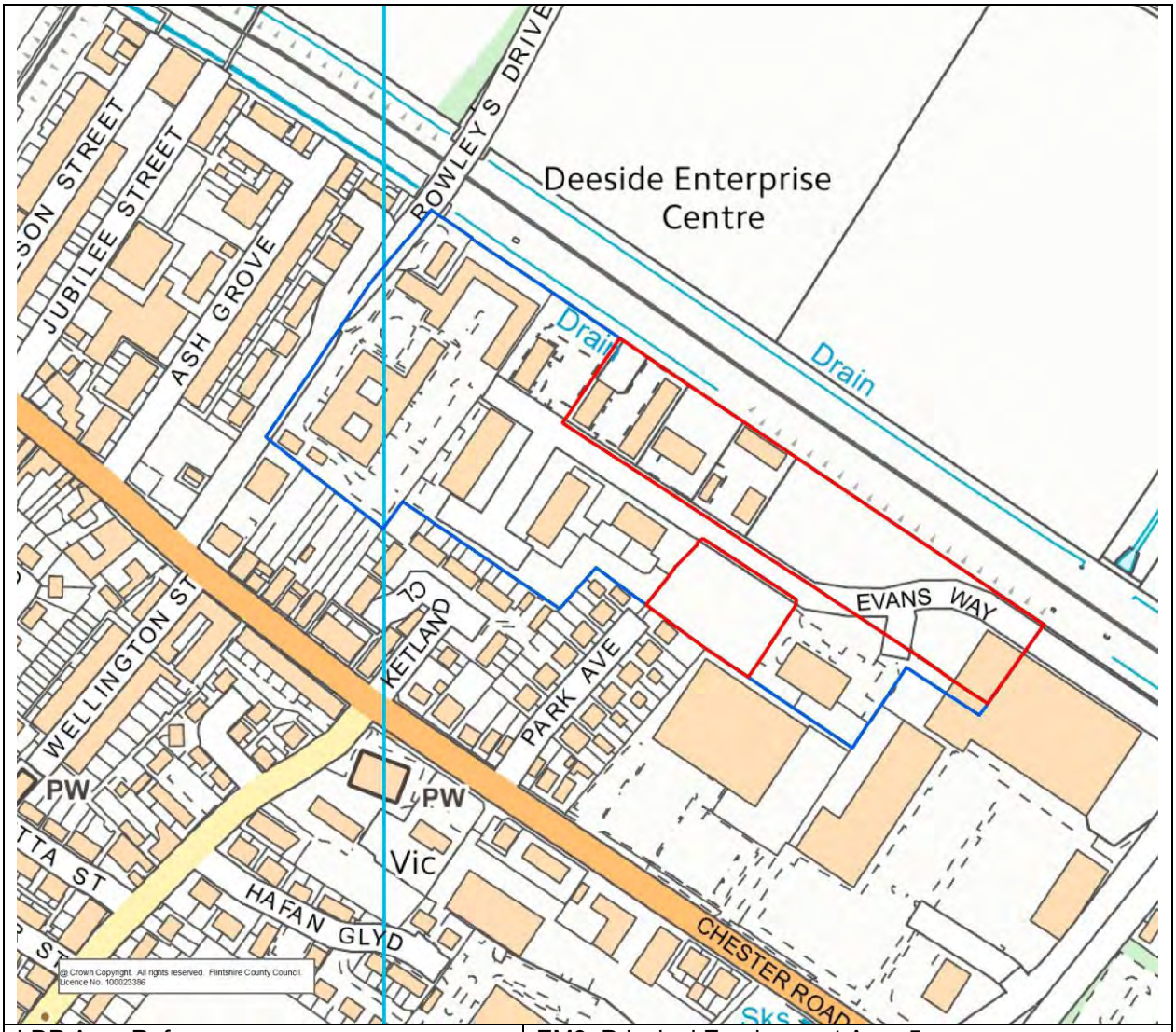
LDP Area Reference	EM3, Principal Employment Area 3
Name	Spencer Industrial Estate, Buckley
Description	Linear scheme of industrial premises, of varying ages and levels of quality, along Standard Road. Land to the south west, along Globe Way is in the process of being developed for four industrial units as Globe Business Park.
Key Occupier(s)	Spencer Industrial, Lester Fabrication & Cladding Co., Concept Oils
Prominence	Poor
Current Use (Use Classes)	B1 (Class III), B2, B8
Size, ha	7.03
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Landfill site adjacent Bounded by land in a range of landscape designations including Greenspaces (Policy L3), and Sites of International Importance/Statutory Sites of National Importance (Policies WB2 and WB3) adjacent
Critical Mass	Good

Opportunities for redevelopment/ expansion	Allocated employment land (EM1.3: Mount Pleasant Road (north)) in the south and west of the area is now largely developed. There are some older, budget quality industrial units to the north of Spencer Road which could benefit from investment and refurbishment, however, generally all land and premises within the estate is in use. Expansion of the area would not be possible without encroaching on surrounding areas of protected greenfield land. The landfill site to the north is sloping (Mount Pleasant) and sits outside of the current Buckley settlement boundary.
Other Information	Within a settlement area Previously an Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Poor Environment: Average **Total Grade: C** Established local industrial estate which has seen some recent development. The scheme is home to a number of Buckley's larger employers. Some units, north of Standard Road are in need of refurbishment but other existing units are of reasonable quality. The emerging LDP should protect the existing Spencer Industrial Estate, and the newly developed Globe Business Park, for B Class employment uses



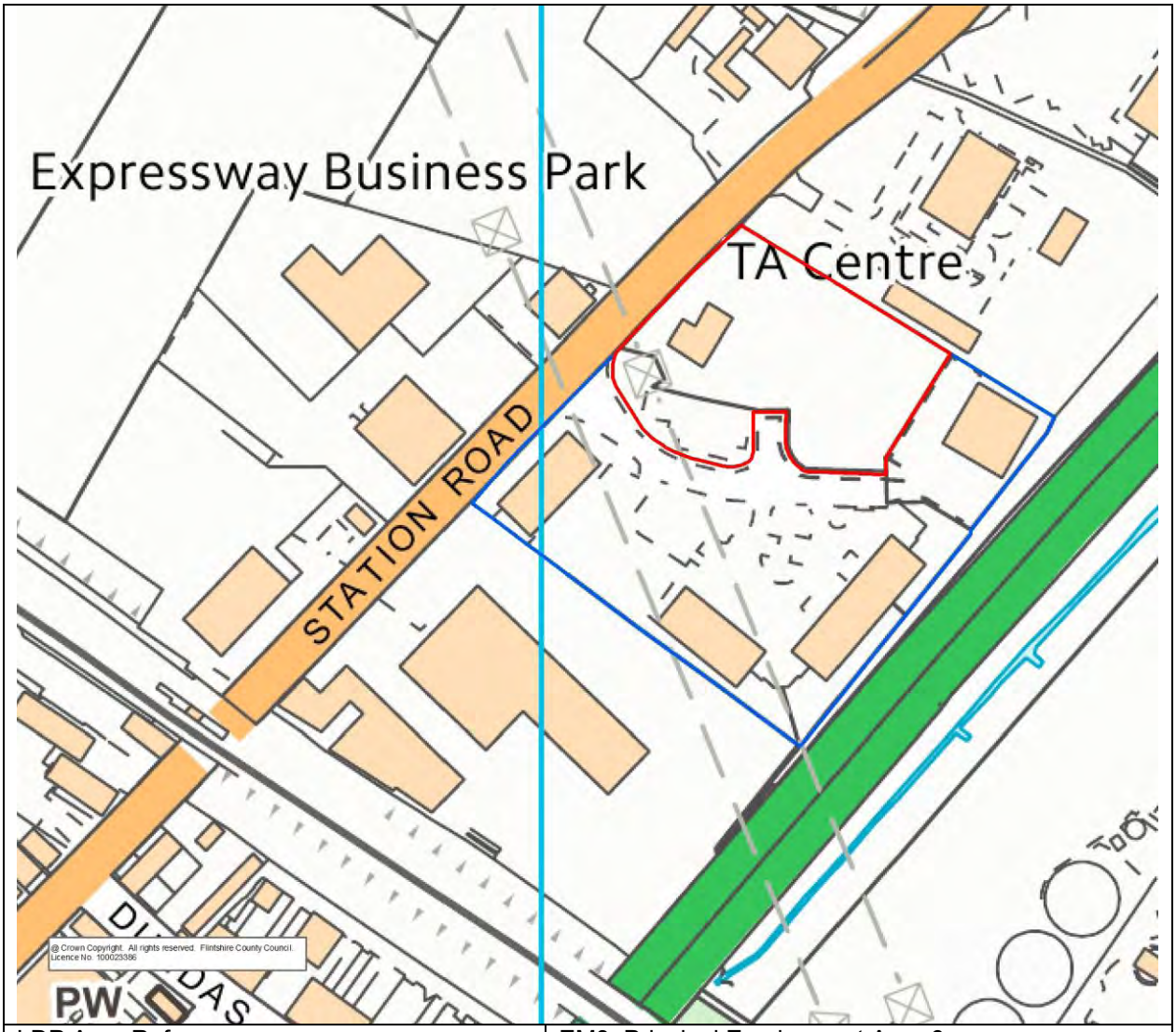
LDP Area Reference	EM3, Principal Employment Area 4
Name	Little Mountain Industrial Estate, Buckley
Description	Premises for two large employers (Glen Dimplex and Buckley Foods), with some smaller premises to the south east, in an edge of settlement location close to Buckley Station
Key Occupier(s)	Glen Dimplex, Buckley Foods
Prominence	Good
Current Use (Use Classes)	B1 (Class III), B2
Size, ha	6.81
Building Age	1945-1990, 1990-2000
Building Quality	Average
Constraints	Green Barrier (Policy GEN4) land to the south and east Sites of International Importance/Statutory Sites of National Importance (Policies WB2 and WB3) to the north and north west
Critical Mass	Poor

Opportunities for redevelopment/ expansion	There are two allocated employment sites within the area: • EM1.4 Land North of Buckley Station - Held as expansion land for Buckley Foods • EM1.5 Drury New Road - Held as expansion land for Glen Dimplex All other land is in use or sits within the secure curtilage of Buckley Foods. Expansion of the area would not be possible without encroaching on surrounding areas of protected greenfield land, which sit outside of the Buckley settlement boundary.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C** Premises for two of the County's larger employers, plus expansion land and ancillary units. The emerging LDP should protect Little Mountain Industrial Estate for B Class employment uses.



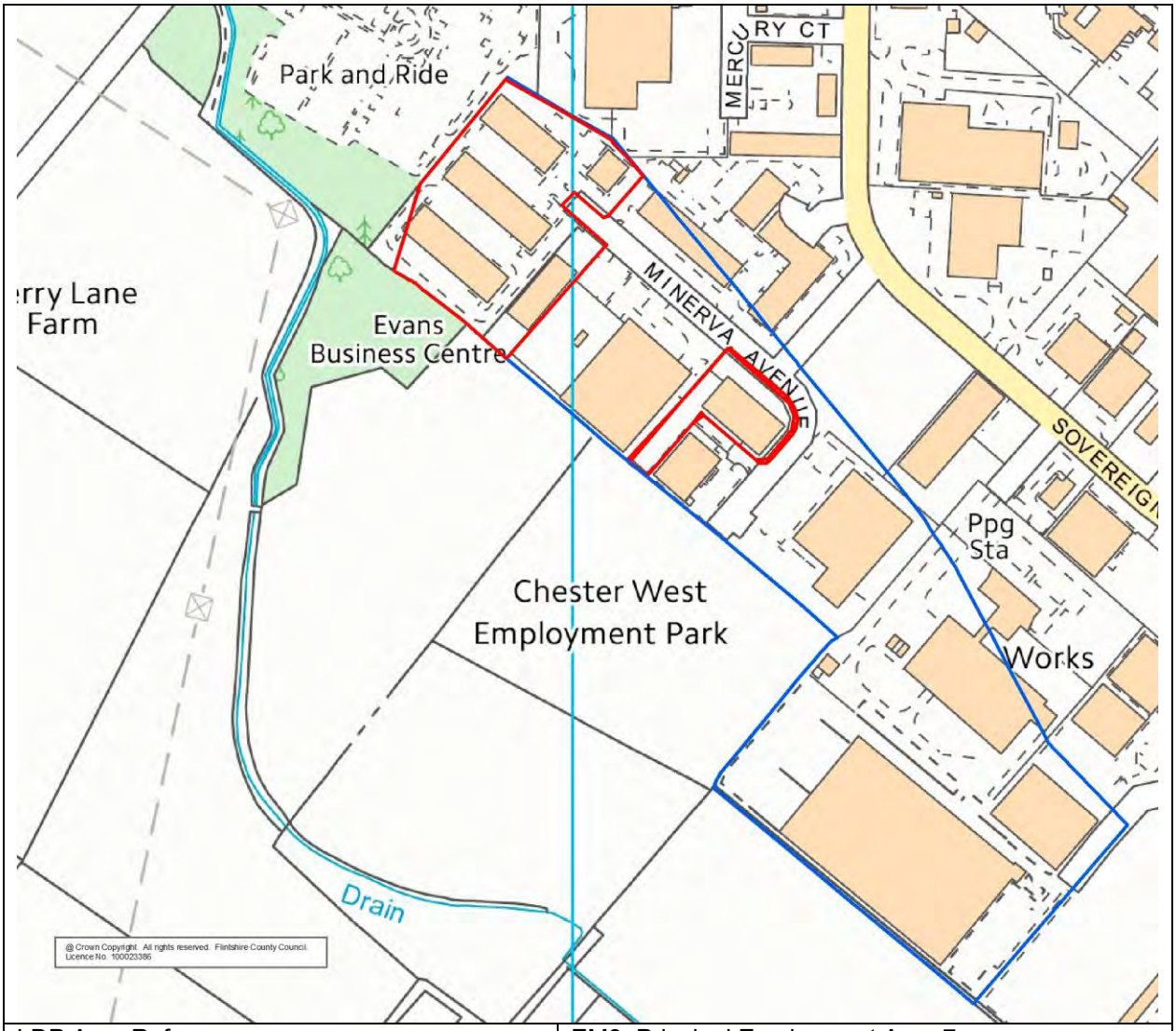
LDP Area Reference	EM3, Principal Employment Area 5
Name	Rowley's Drive, Shotton
Description	Established employment area, centrally located in the Queensferry/Shotton settlement areas and comprising modern office and industrial units in the south east, some in trade/motor trade use, and smaller, older workshops and offices to the north west.
Key Occupier(s)	Direct Line Communications, Epryn, Landranger Deeside
Prominence	Poor
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	5.02
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Bounded by housing Adjacent to Minerals Safeguarding Area (Policy MIN8)
Critical Mass	Average
Opportunities for redevelopment/ expansion	Includes employment site EM1.26 Rowley's Drive, Shotton (0.70 ha) – On the market, for sale, for B1/B2/B8 uses. All other land is developed an in use. Area is tightly bounded by other uses and the railway line.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Poor Environment: Average **Total Grade: C** Small local industrial estate, providing a good mix of office and workshop premises, in an area otherwise dominated by larger industrial uses. Rowley's Drive is of particular value because of its central location in Shotton which means that it is well placed to serve the Connah's Quay, Shotton and Queensferry Markets. The Rowley's Drive should be protected in the emerging LDP for B Class employment and, reflecting the current situation, an element of trade use. A small boundary adjustment is required in the south east to exclude part of a retail unit.



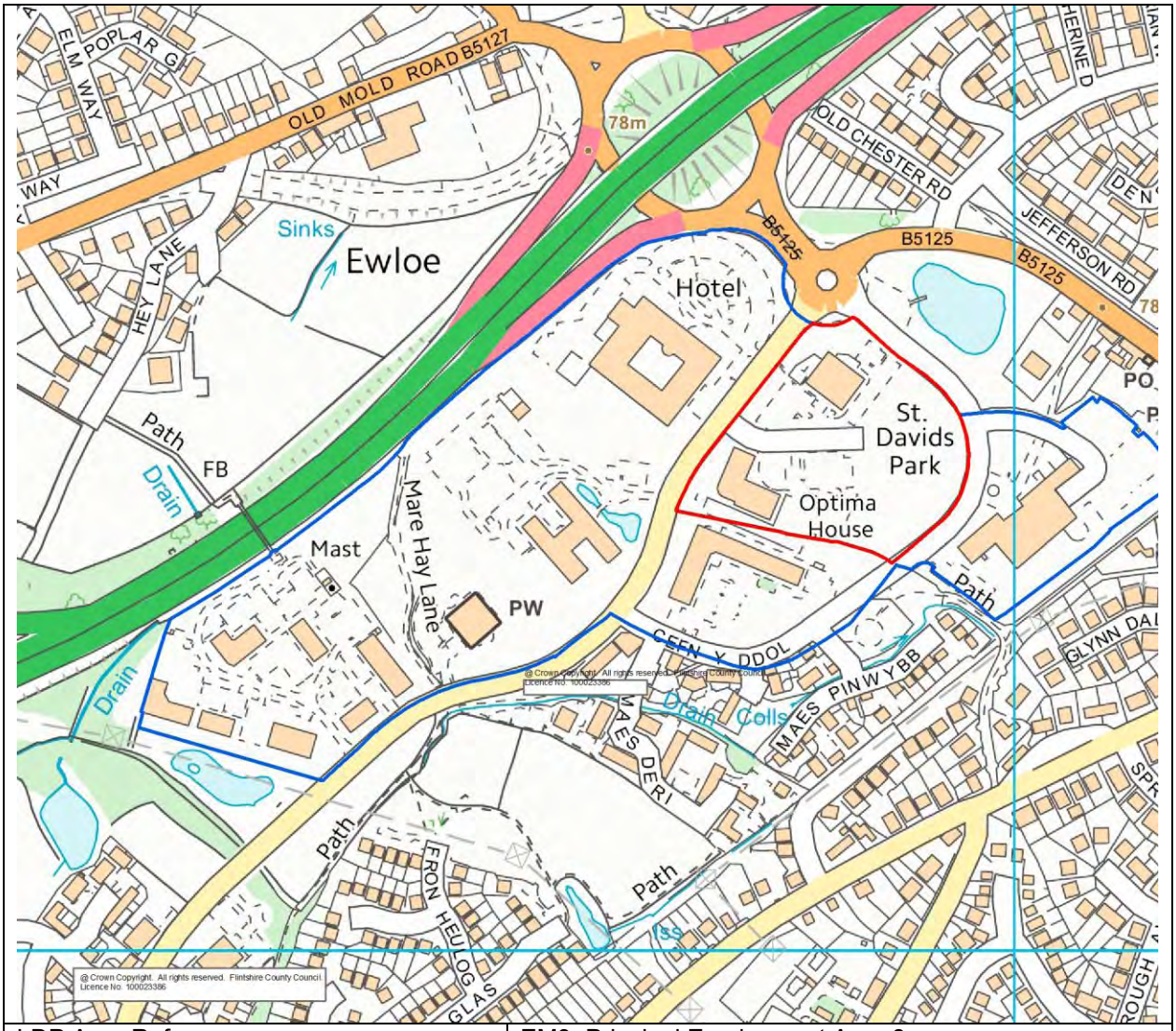
LDP Area Reference	EM3, Principal Employment Area 6
Name	Expressway Business Park, Queensferry
Description	Low density rural industrial estate, comprising five modern industrial units, most in trade use, backing on to the A494
Key Occupier(s)	Huws Gray, Queensferry MOT Testing Station
Prominence	Good
Current Use (Use Classes)	B1 (Class III) B2, B8
Size, ha	1.99
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	-
Critical Mass	Average
Opportunities for redevelopment/ expansion	None. Previous employment site EM1(20) is now developed as a unit and timber yard for Huws Gray. Area is bounded by other uses.
Other Information	In a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Good Environment: Good **Total Grade: C** Established local employment area accommodating a group of trade/motor trade companies, on low density sites with most land in use. The area should therefore be protected for B-Class employment and trade uses in the emerging LDP.



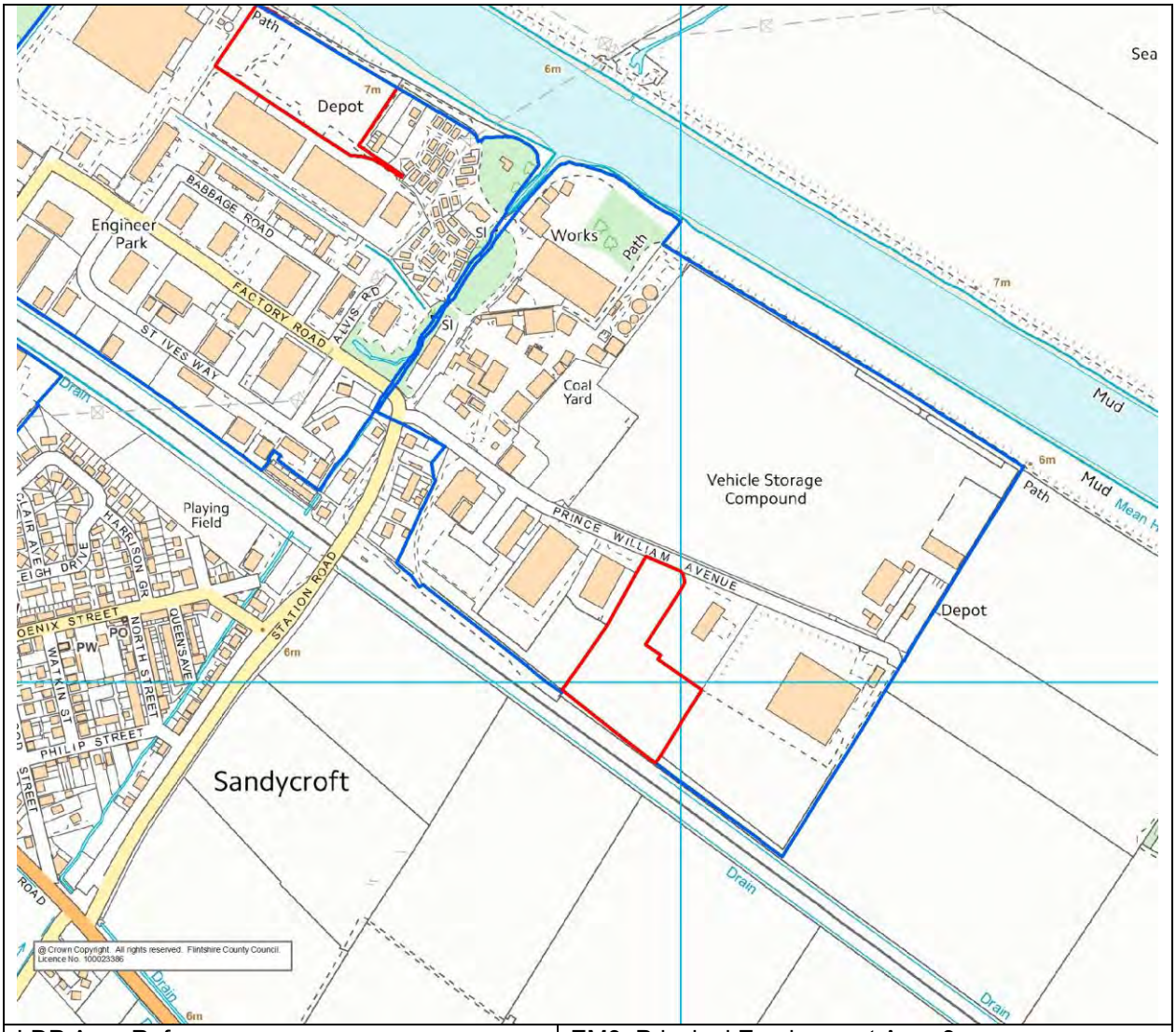
LDP Area Reference	EM3, Principal Employment Area 7
Name	Evans Business Centre, Chester West
Description	Western portion of the larger Sealand Industrial Estate, most of which is in Chester. The section within Flintshire comprises the modern, Evans Business Centre (34 office suites and 23 workshops) plus several larger, good quality, self-contained office and industrial properties to the south east
Key Occupier(s)	Quality Hydraulic Power, We Buy Any Car, NHS
Prominence	Poor
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	7.86
Building Age	2000+
Building Quality	Good
Constraints	Bounded by Green Barrier (Policy GEN4) land to the west
Critical Mass	Good

Opportunities for redevelopment/ expansion	One development plot of 0.35 ha remains available and on the market, for sale, on Minerva Avenue. There is a further development plot to the east, which is mostly in England. Elsewhere, expansion of the Flintshire portion of Sealand Industrial Estate would not be possible without encroaching on surrounding protected greenfield land, which is outside of the Chester settlement boundary. Land to the south east is in use as the Chester Football Club Stadium.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Poor Environment: Good **Total Grade: B/C** Modern workshop, industrial and office premises which forms a key part of Sealand Industrial Estate, the main industrial estate of Chester. Evans Business Centre (and surrounding premises) should be protected in the emerging LDP for B Class employment uses.



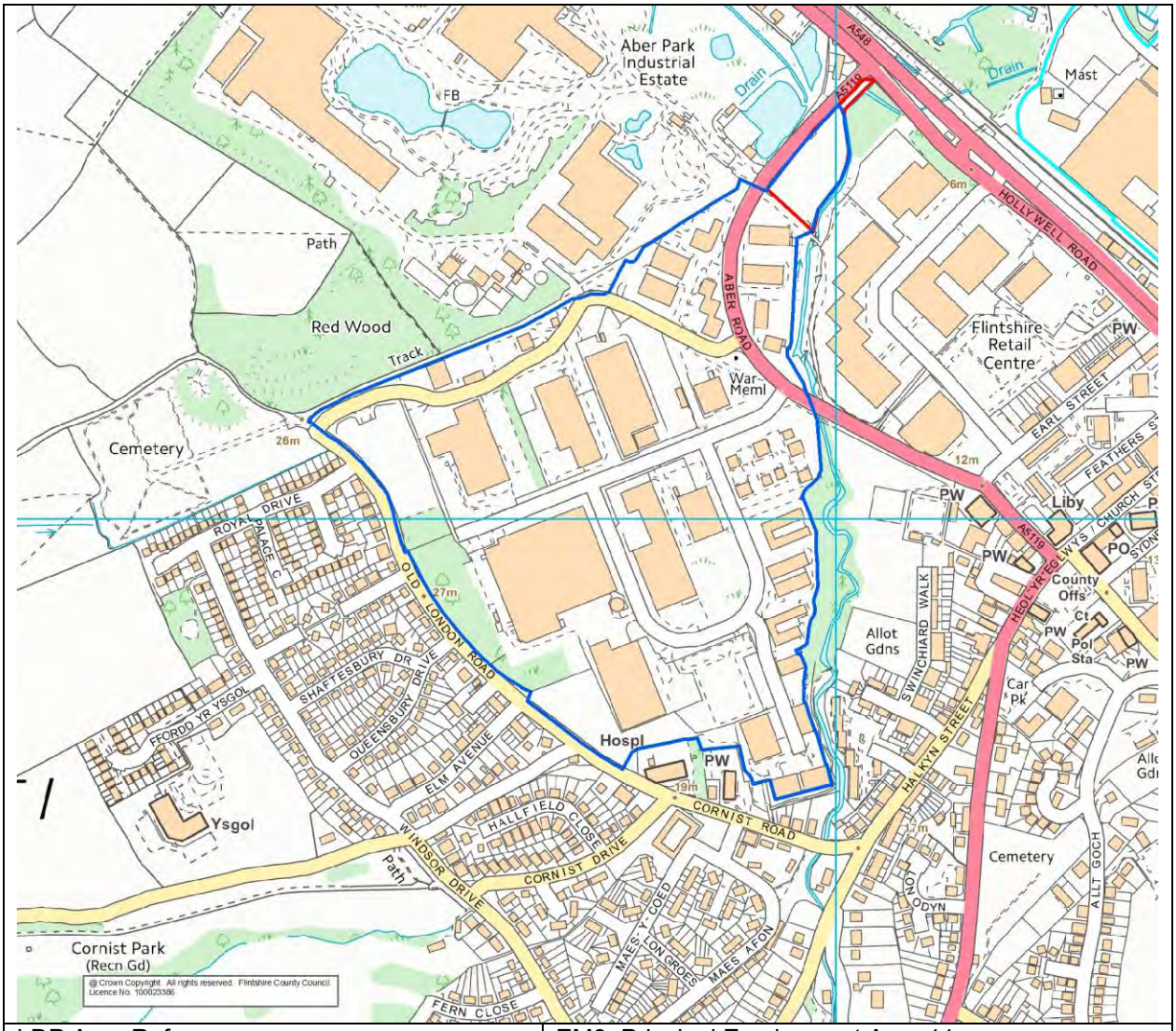
LDP Area Reference	EM3, Principal Employment Area 8
Name	St Davids Park, Ewloe
Description	Group of large, self-contained HQ office buildings, prominently located off the A494. Area also incorporates a hotel and church.
Key Occupier(s)	Redrow, HSBC, Moneysupermarket.com
Prominence	Good
Current Use (Use Classes)	B1 (Class II), C1, D1 (Class XIII)
Size, ha	14.82
Building Age	2000+
Building Quality	Good
Constraints	-
Critical Mass	Average
Opportunities for redevelopment/ expansion	One office development plot (EM2.3 St David's Park) of 0.80 ha remains available in the south east. Surrounding land is developed. There is sufficient land east of the church to accommodate a further office building, assuming the land is not in use for religious or recreational uses.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Good Environment: Good **Total Grade: B** Group of HQ office buildings including the headquarters of housebuilder Redrow. The scheme is therefore of regional and national significance and should be strongly protected in the emerging LDP for B Class employment.



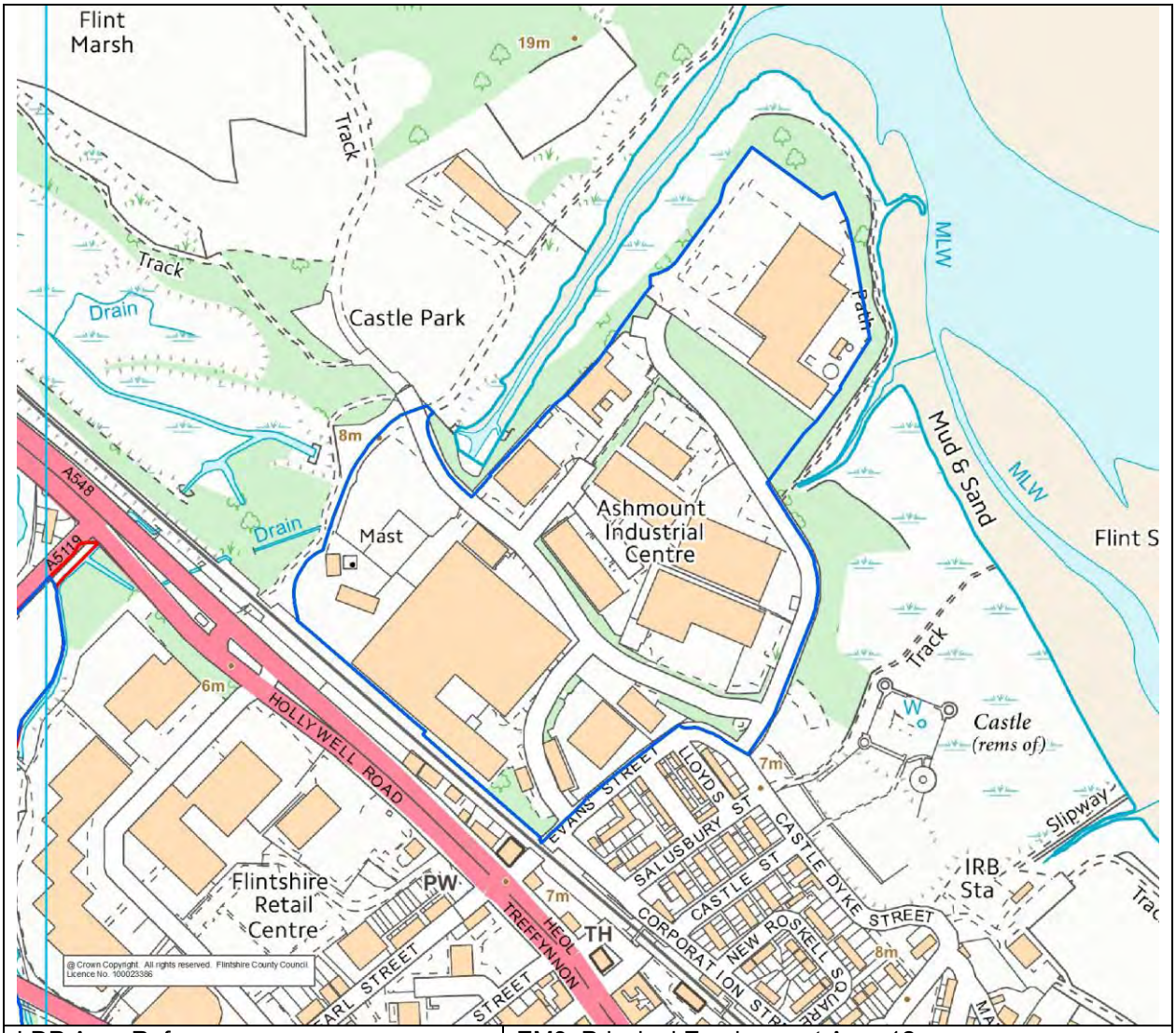
LDP Area Reference	EM3, Principal Employment Area 9
Name	Sandycroft Industrial Estate, Sandycroft
Description	Established industrial estate, one of a series that extend along Factory Road and Chester Road, south of the A494.Comprises a large vehicle storage compound and older workshops north of Prince William Avenue along with larger, more modern industrial and office units to the south.
Key Occupier(s)	Copart UK, J R Webster and Co, Delta Rock North West, Recyclo Skip Hire
Prominence	Poor
Current Use (Use Classes)	B1 (Class II and III), B2, B8
Size, ha	33.04
Building Age	1945-90, 1990-2000
Building Quality	Average
Constraints	Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north Green Space (Policy L3) to the south and east Minerals Safeguarding Area (Policy MIN8) to the south and east Housing adjacent
Critical Mass	Average

Opportunities for redevelopment/ expansion	Includes employment site EM1.25 Prince William Avenue (1.80 ha) – A full application for six industrial/business buildings with a total floor space of 5,460 sqm under consideration by Flintshire County Council here. The large vehicle storage compound to the north is in use by Copart UK. However, if it ever became vacant it would create a substantial development opportunity site. Other unused land falls within the curtilage of existing large occupiers, notably Recyclo Skip Hire in the south east. Further expansion of the area would not be possible without encroaching on surrounding Green Space land which is outside of the settlement boundary.
Other Information	Within a settlement area An Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Poor Environment: Average **Total Grade: B/C** Backland industrial location within the wider Factory Road and Chester Road employment location. As such it includes a number of waste management companies and lower value open storage uses. However, the area continues to serve a useful function in accommodating these uses. It also provides an area of search for future employment sites in the Queensferry/Sandycroft area. Sandycroft Industrial Estate should therefore be protected in the emerging LDP for B Class employment.



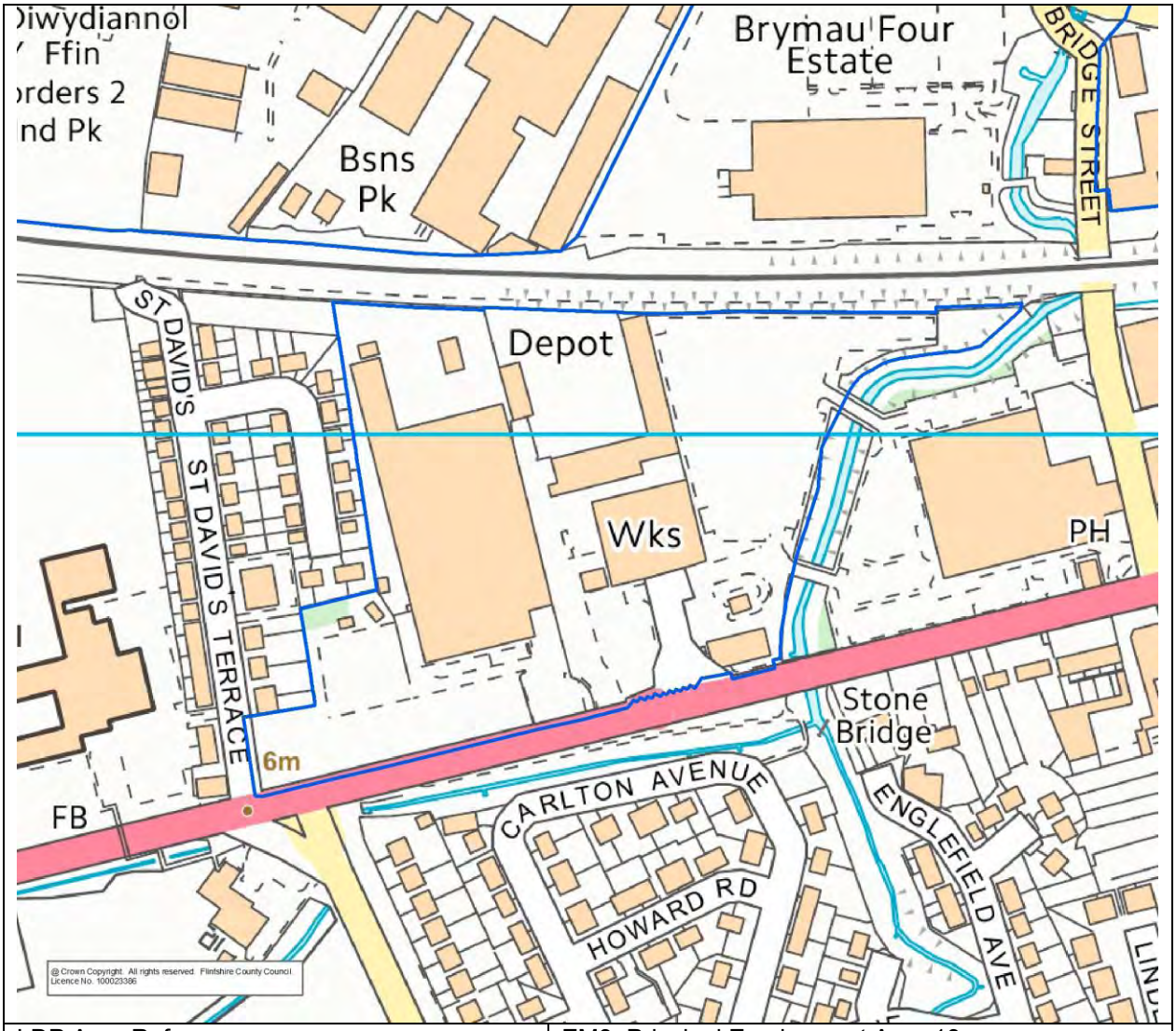
LDP Area Reference	EM3, Principal Employment Area 11
Name	Ashmount Industrial Estate, Flint
Description	Large, edge of settlement industrial estates, accommodating a range of larger businesses in the north and west along with a group of smaller modern industrial and office units in the east around Aber Road and Ashmount Enterprise Park in the south east.
Key Occupier(s)	Flint Refurbs, Nice-Pak International, Aber Grange
Prominence	Good
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	23.96
Building Age	1990-2000, 2000+
Building Quality	Good
Constraints	Greenspace (Policy L3) land in the south west of the estate, fronting Old London Road
Critical Mass	Good

Opportunities for redevelopment/ expansion	There is one development site at the Aber Road/A584 Holywell Road junction (bounded by Swinchiard Brook to the east) which is currently in temporary use as a car wash. Further development land is available in the centre of Ashmount Industrial Estate, to the east of the Nice-Pak International facility and to the west of Ashmount Enterprise Park. A third development site exists to the south of the Red Pit Community Woodland, at the junction of the estate road and Old London road.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: B** Major industrial estate on the Flint Coast, accommodating several major employers, and also providing a diverse range of smaller business accommodation, including self-contained and serviced office suites. Three further development plots also exist within the employment area boundary, which should be protected for B Class employment, as should .the wider employment area. The area boundary should also be extended to include the Kimberley Clark facility to the north.



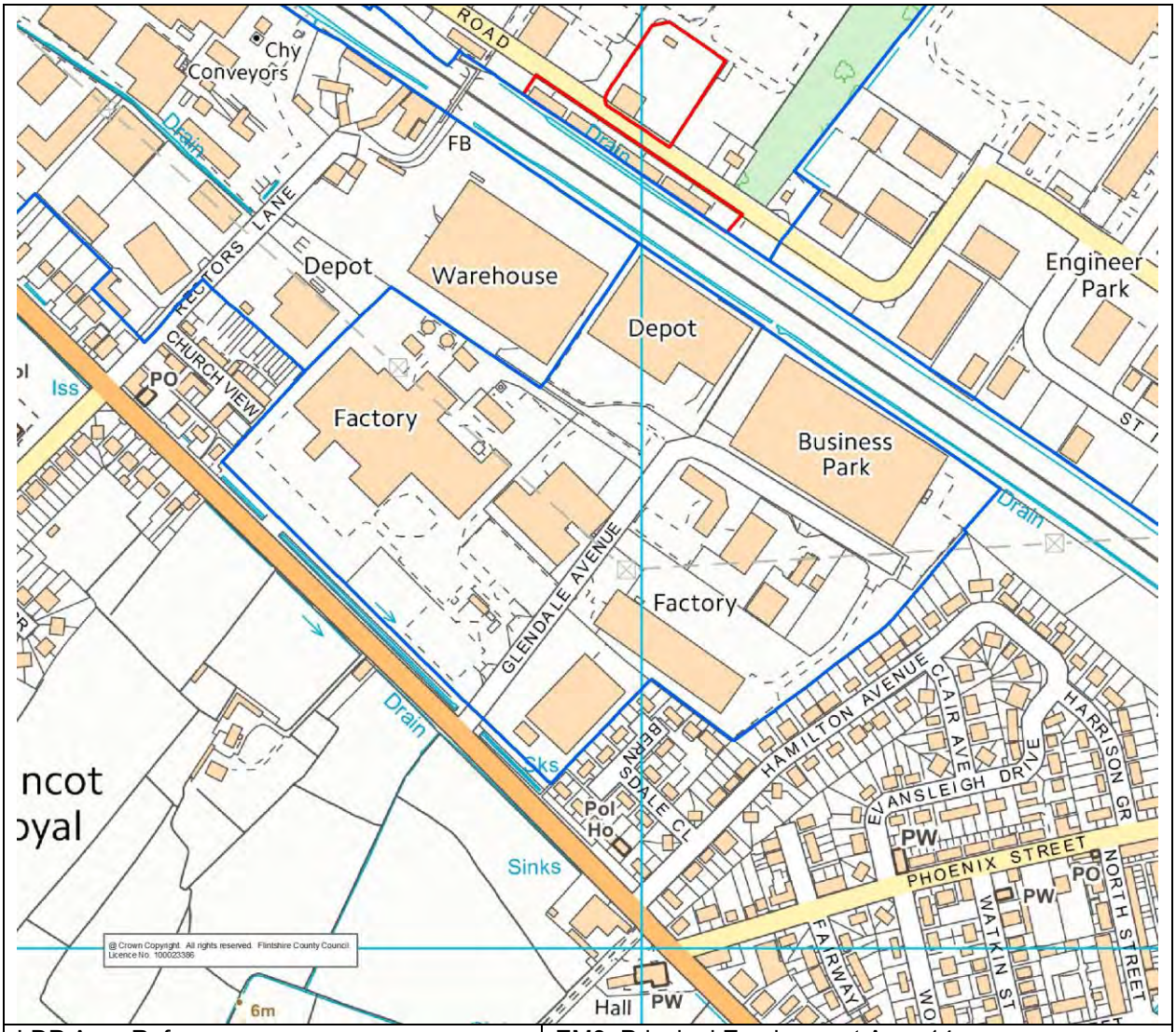
LDP Area Reference	EM3, Principal Employment Area 12
Name	Castle Park/Ashmount Industrial Centre, Flint
Description	Older industrial estate of some 34 mid-sized, mostly budget and moderate industrial premises in a backland location between the railway and the Dee Estuary.
Key Occupier(s)	Celtic TY, Lex Machinery Sales, Instant Crusher Spares
Prominence	Poor
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	13.59
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Bounded by housing and Flint Castle to the south, railway line to the west and areas of high landscape quality associated with Flint Marsh and the Dee Estuary (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north and east.
Critical Mass	Good

Opportunities for redevelopment/ expansion	A development site of some 1.40 ha is on the market, to let, in the north of the estate, fronting the Dee Estuary. One other redevelopment opportunity site was identified in the Castle Park Industrial Estate Masterplan of 2008. It comprises part of a building which is part owned by the Council, (comprising six units – 15, 16, 17, 18, 19 and 20 – 1.93 ha); the cleared vacant site owned by Delyn Metals (now Instant Crusher Spares), and adjacent two low grade buildings owned and occupied by PJ Colours.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Poor **Total Grade: C** Secondary industrial estate in Flint, which generally meets the needs of established micro and small businesses. The quality of premises varies and the location has been a previous focus of regeneration spending and further investment in the built quality of the area would be desirable. Two further redevelopment opportunity sites also exist within the employment area boundary, which should be protected for B Class employment, as should .the wider employment area. The area boundary should also be extended to include developed elements of Castle Park to the north.



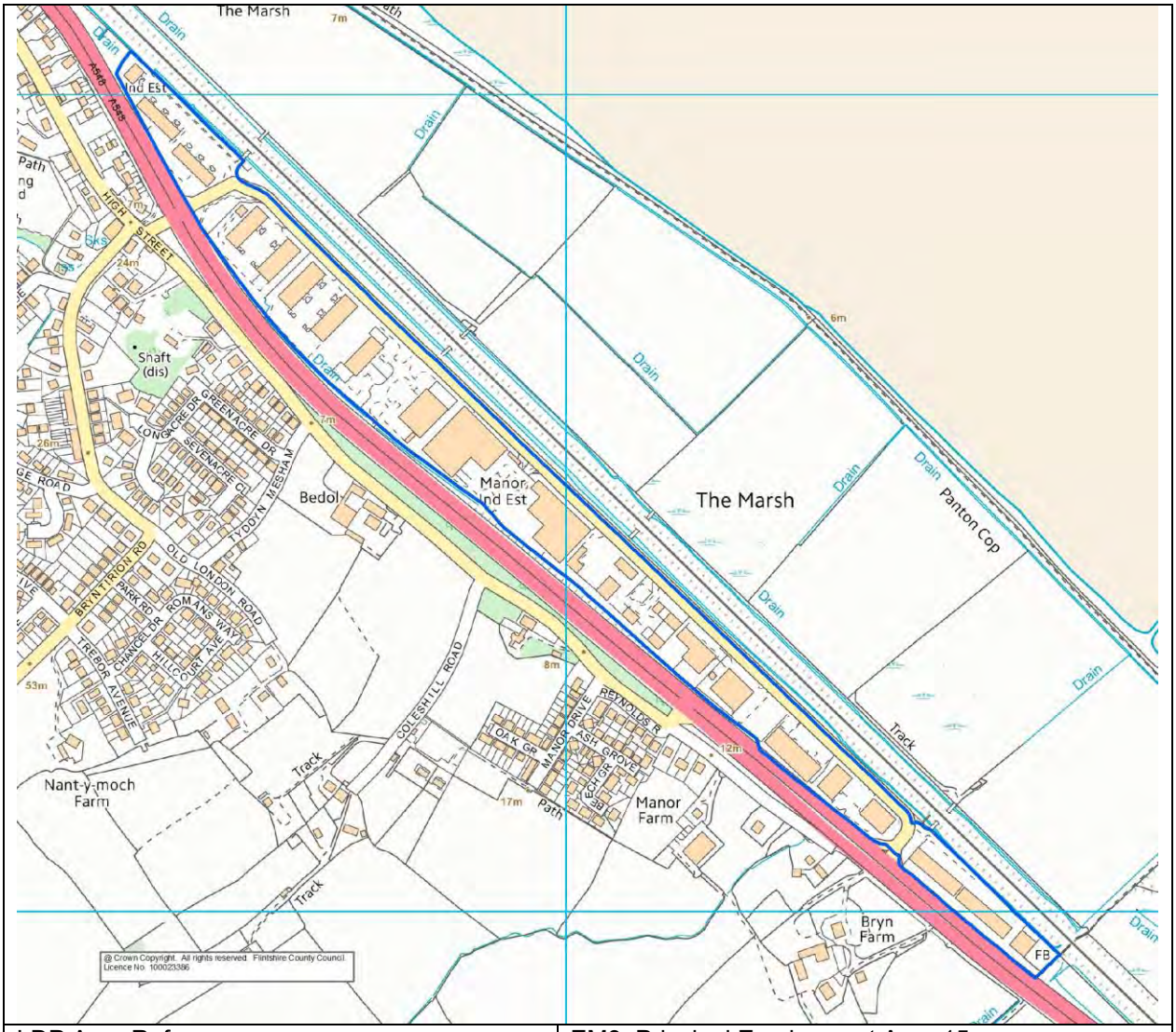
LDP Area Reference	EM3, Principal Employment Area 13
Name	Glen Industrial Estate, Saltney
Description	Group of three older industrial premises, including a large bakery, centrally located in Saltney and adjacent to retail
Key Occupier(s)	Allied Bakeries
Prominence	Good
Current Use (Use Classes)	B2
Size, ha	5.22
Building Age	1945-90
Building Quality	Average
Constraints	Retail and housing adjacent
Critical Mass	Poor
Opportunities for redevelopment/ expansion	All premises and land appears to be in use, or on the market. The estate is tightly bounded by surrounding uses and the railway line.
Other Information	In a settlement area

Grading and Recommendations	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C** While the quality of premises here is not particularly high, the area appears well used and accommodates at least one national employer (Allied Bakeries). Glen Industrial Estate should be protected in the emerging LDP for B Class employment. In particular, proposals to redevelop some or all of the site for retail, extending the adjacent retail area, should be resisted. Land in the east is now in use as car parking for the adjacent foodstore and should be removed from the employment area boundary.



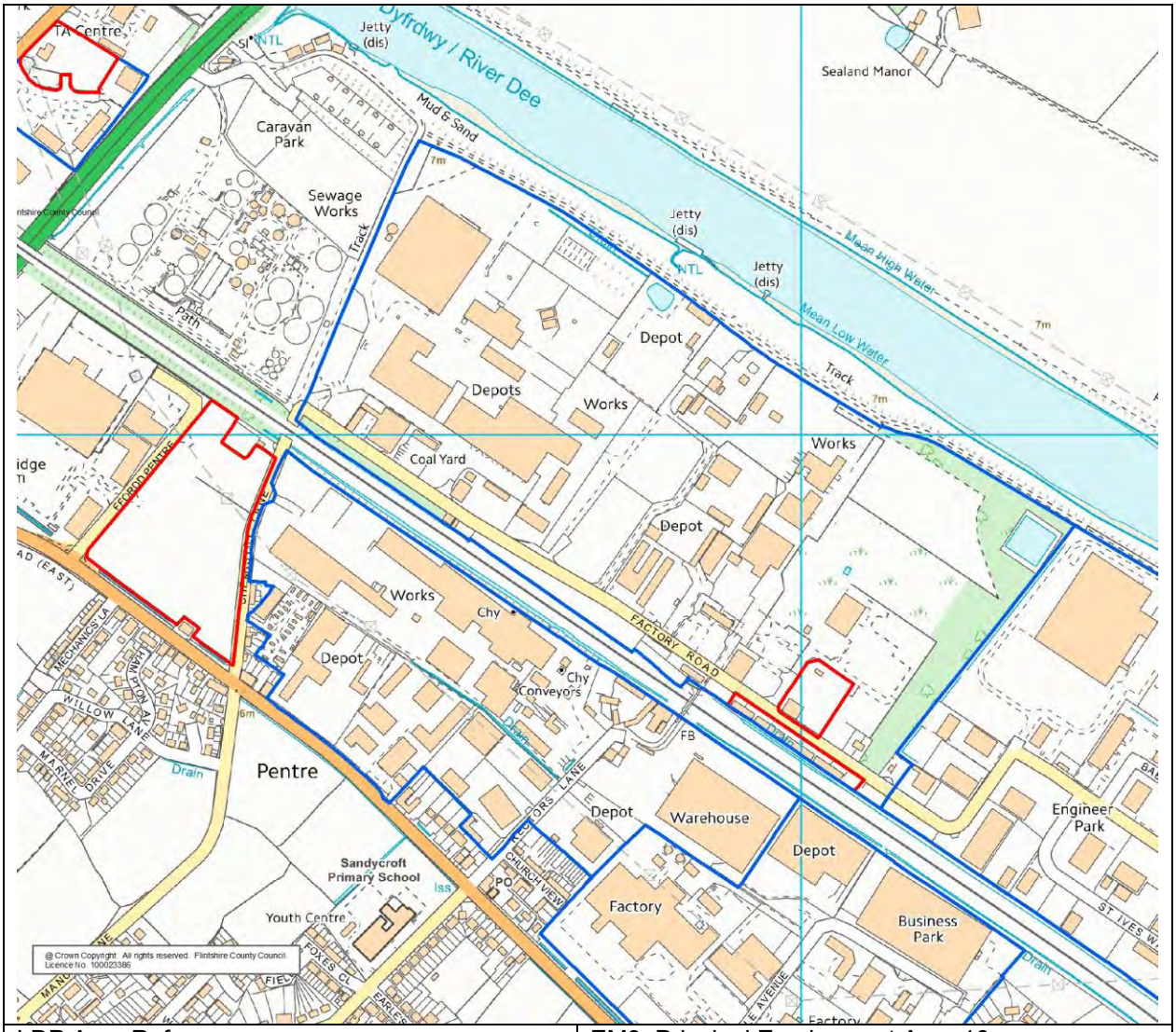
LDP Area Reference	EM3, Principal Employment Area 14
Name	Glendale Business Park, Sandycroft
Description	Established industrial estate, one of a series that extend along Factory Road and Chester Road, south of the A494.Comprises a series of larger manufacturing and warehouse units, including a 39,000 sqm warehouse for Great Bear Distribution.
Key Occupier(s)	Lingar, Howden, 2 Sisters Food Group, Great Bear Distribution
Prominence	Average
Current Use (Use Classes)	B1 (Class II and III), B2, B8
Size, ha	13.85
Building Age	1945-90, 1990-2000
Building Quality	Average
Constraints	Green Space (Policy L3) to the south Housing adjacent
Critical Mass	Good
Opportunities for redevelopment/ expansion	All land and premises in use. Area bounded by other uses, railway and Green Space
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** Established industrial location, part of the wider industrial centre of Chester Road, and accommodating a number of large manufacturing and logistics occupiers. Glendale Business Park should be protected in the emerging LDP for B Class employment.



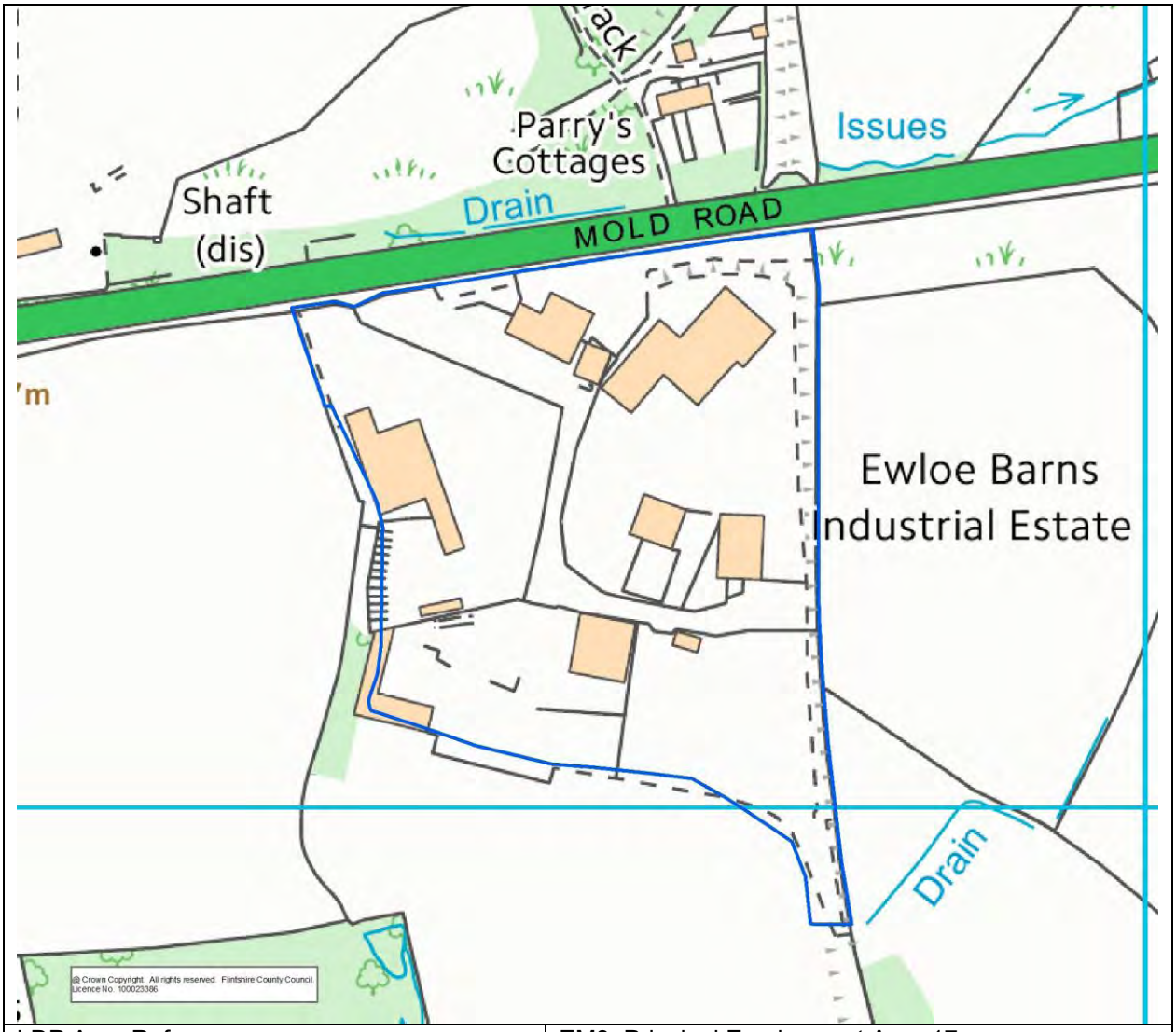
LDP Area Reference	EM3, Principal Employment Area 15
Name	Manor Industrial Estate, Bagillt
Description	Linier industrial estate , running parallel to the A458, between Flint and Bagillt and comprising a range of workshop schemes and mid-sized industrial units
Key Occupier(s)	MG Engineering, Thames Valley Controls
Prominence	Good
Current Use (Use Classes)	B1 (Class III) B2, B8
Size, ha	10.67
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	In a Minerals Safeguarding Area (Policy MIN8)
Critical Mass	Good
Opportunities for redevelopment/ expansion	None. Area is fully developed and tightly bound by the A548 and railway.
Other Information	Outside of a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C** Large, established local employment area serving the Flint Coast. In particular, it is a key source of budget and moderate quality workshop space for local micro businesses. Manor Industrial Estate should be protected in the emerging LDP for B Class employment.



LDP Area Reference	EM3, Principal Employment Area 16
Name	Pentre Industrial Estate, Pentre
Description	Modern industrial and office park, one of a series that extend along Factory Road and Chester Road, south of the A494.Comprises a range of larger manufacturing facilities and warehouses in the west and light industrial units, plus substantial areas of cleared brownfield land, in the east
Key Occupier(s)	SP Energy Networks, Veolia,
Prominence	Average
Current Use (Use Classes)	B1 (Class II and III), B2, B8
Size, ha	33.75
Building Age	1945-90, 1990-2000
Building Quality	Average
Constraints	Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north Green Space (Policy L3) to the south east Housing adjacent Sewage works to the west
Critical Mass	Good

Opportunities for redevelopment/ expansion	Land in the east, close to Green Space site L3, 150 is underused and includes large areas of vacant brownfield land, parts of which are on the market for development. The area should be considered as an area of search for new employment opportunity sites in Flintshire.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: C/D** Established industrial location. Includes some large employers but is also a focus for 'bad neighbour' waste processing uses in Deeside, due to the availability of land and budget industrial space here. The area should generally be protected for B Class employment uses. However, the Council should also be aware that there are large areas of vacant land in this area which could be consolidated to provide future allocations of brownfield employment development land, should these be required in the future.

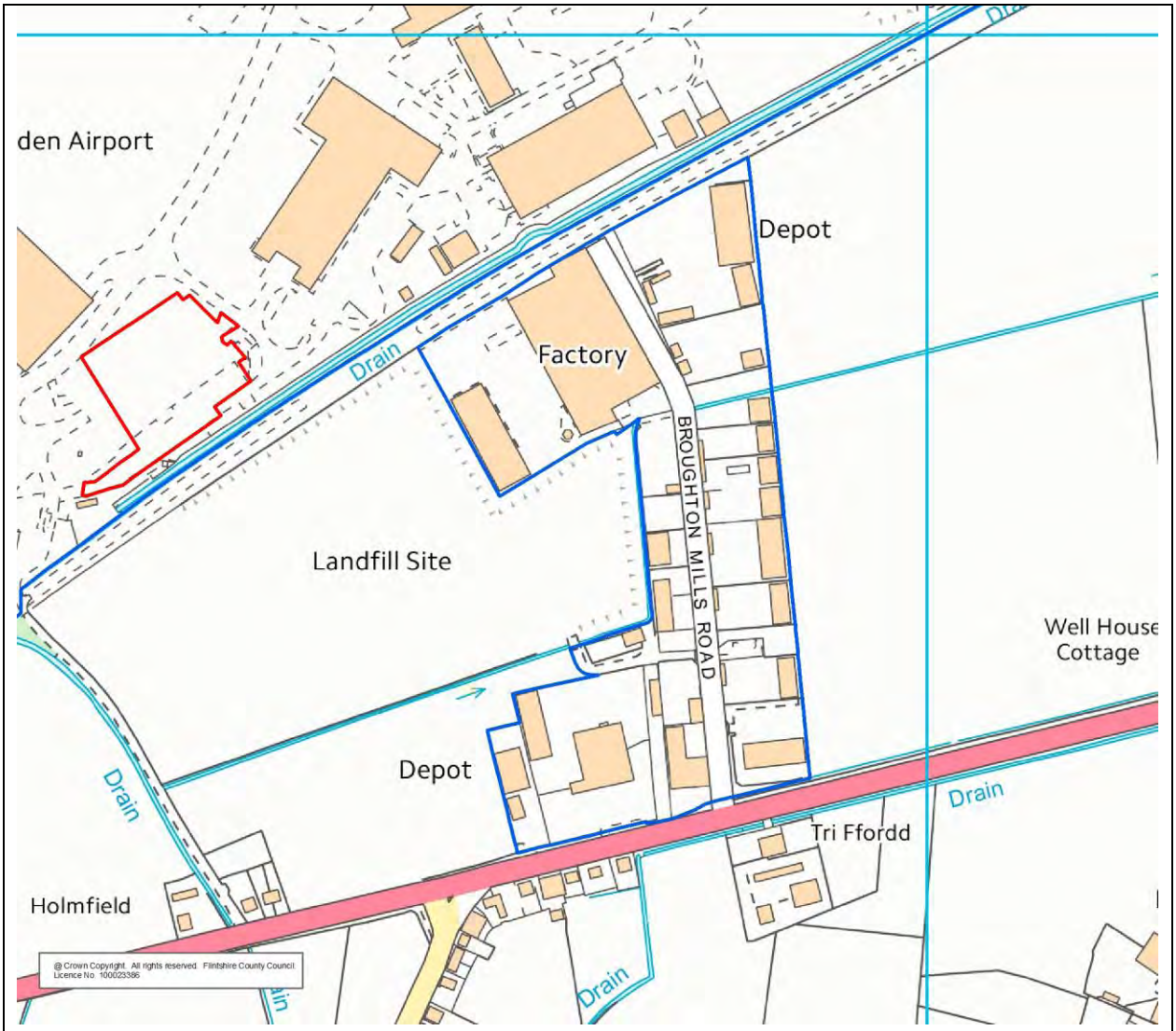


LDP Area Reference	EM3, Principal Employment Area 17
Name	Ewloe Barns (Industrial Estate), Alltami
Description	Small, scheme of trade and workshop properties, prominently located off the A494
Key Occupier(s)	Flintshire Steel Supplies, Thorncliffe Building Supplies, Thorncliffe Skip and Waste Management
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B8
Size, ha	4.76
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	-
Critical Mass	Average
Opportunities for redevelopment/ expansion	Scheme is developed to a low density. However, most land within the area appears in use for vehicle parking and open storage. The area is outside of the Alltami settlement boundary and expansion would not be possible without the loss of adjacent agricultural land.
Other Information	Outside of settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Rural workshop and trade scheme, serving the local area and accommodating a range of occupiers, including some 'bad neighbour' uses. There is little scope to grow the scheme. The emerging LDP should protect the existing Ewloe Barns Industrial Estate for B Class employment uses. However, it also needs to recognise that many of the units are in trade use.

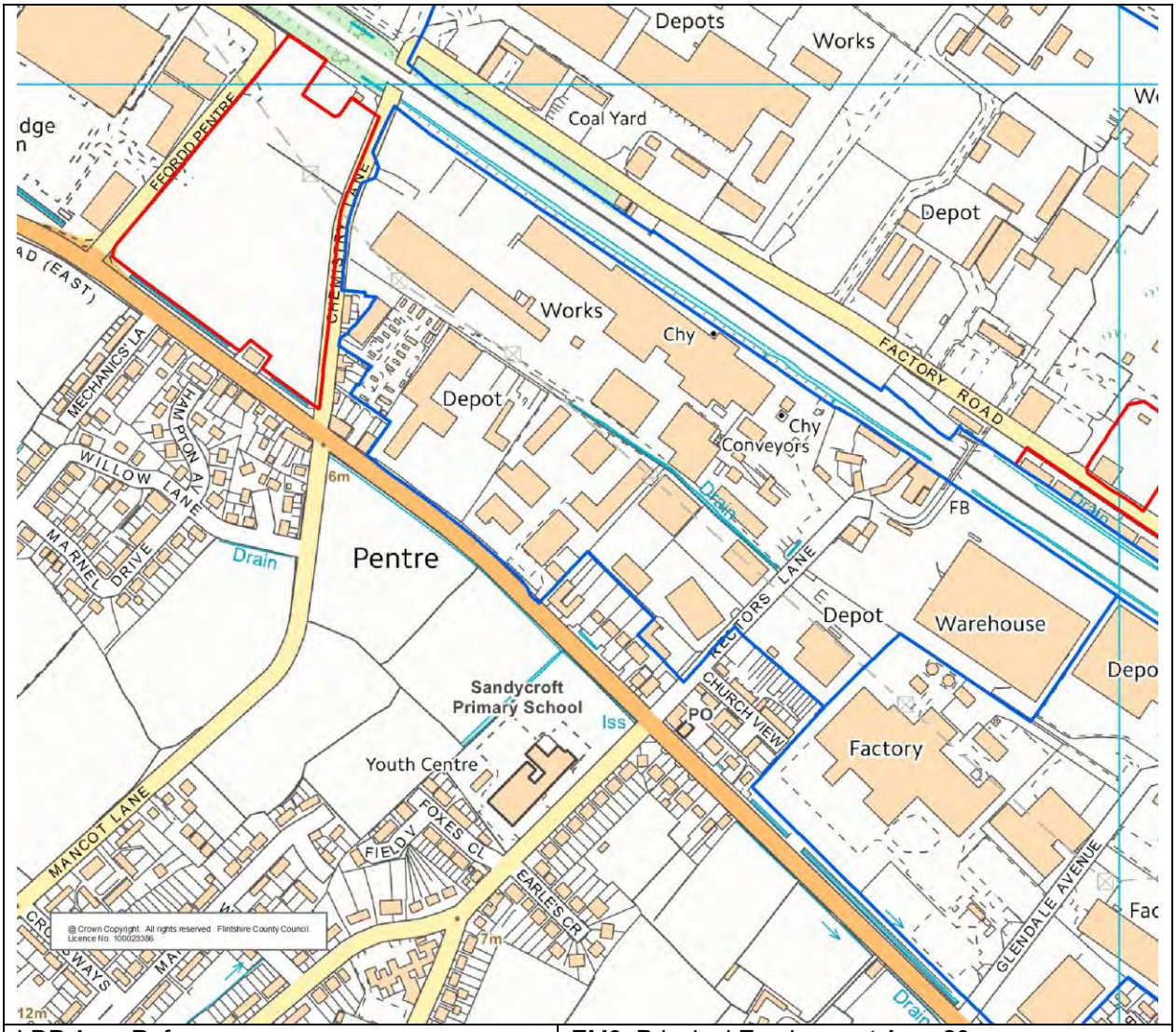
LDP Area Reference	EM3, Principal Employment Area 18
Name	Alltami Depot, Alltami
Description	Rural employment area comprising a roadside depot for Flintshire County Council, several smaller units and a large (6,412 sqm) warehouse which is on the market, to let. The area is prominently located on the A494, in an edge of settlement location.
Key Occupier(s)	Flintshire County Council (Streetscene Services)
Prominence	Good
Current Use (Use Classes)	B8
Size, ha	8.47
Building Age	1990-200
Building Quality	Average
Constraints	Housing to the west
Critical Mass	Poor
Opportunities for redevelopment/ expansion	There is a substantial area of undeveloped land (some 3.5 ha) surrounding the warehouse property which is currently vacant and could provide further development opportunities here, depending on who ultimately occupies the property. Land to the south and north is in use for quarrying at present, but when reclaimed could also provide opportunities for development and expansion.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average **Total Grade: C** Rural employment area including a large vacant warehouse and surrounding land. The future of this area will be determined by what company occupies that large (6,412 sqm) property and the Council should continue to monitor change in this location, particularly as the warehouse sits to the north of a County Council depot. The emerging LDP should continue to protect Alltami Depot for B Class employment uses.



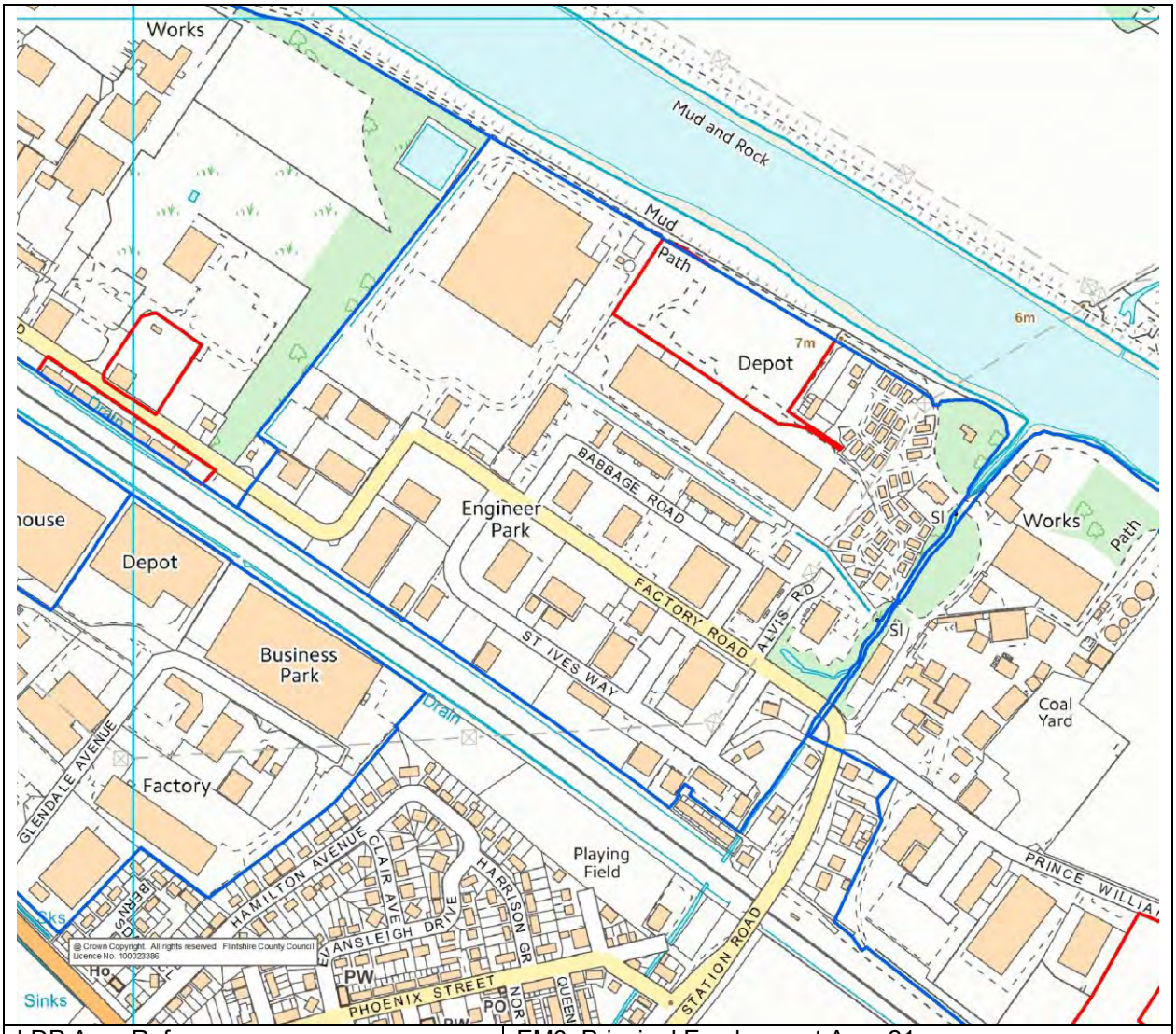
LDP Area Reference	EM3, Principal Employment Area 19
Name	Manor Park (Broughton Industrial Estate), Broughton
Description	Linear industrial estate of moderate quality light industrial units and waste processing depots, plus a larger manufacturing facility for Montgomery Tomlinson in the north.
Key Occupier(s)	Montgomery Tomlinson
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B2, B8
Size, ha	7.64
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Landfill site to the west Green Barrier land (Policy GEN4) to the east
Critical Mass	Average
Opportunities for redevelopment/ expansion	All land and property is in use. Further expansion is not possible without encroaching on adjacent agricultural land, including landfill and Green Barrier land.
Other Information	Outside of a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Good Environment: Average **Total Grade: C** Small, but reasonable quality local industrial estate, serving Broughton and the south east of the County. In particular it accommodates a number of 'bad neighbour' waste processing uses which could not be housed on nearby Hawarden Industrial Park. The emerging LDP should continue to protect Manor Park for B Class employment.



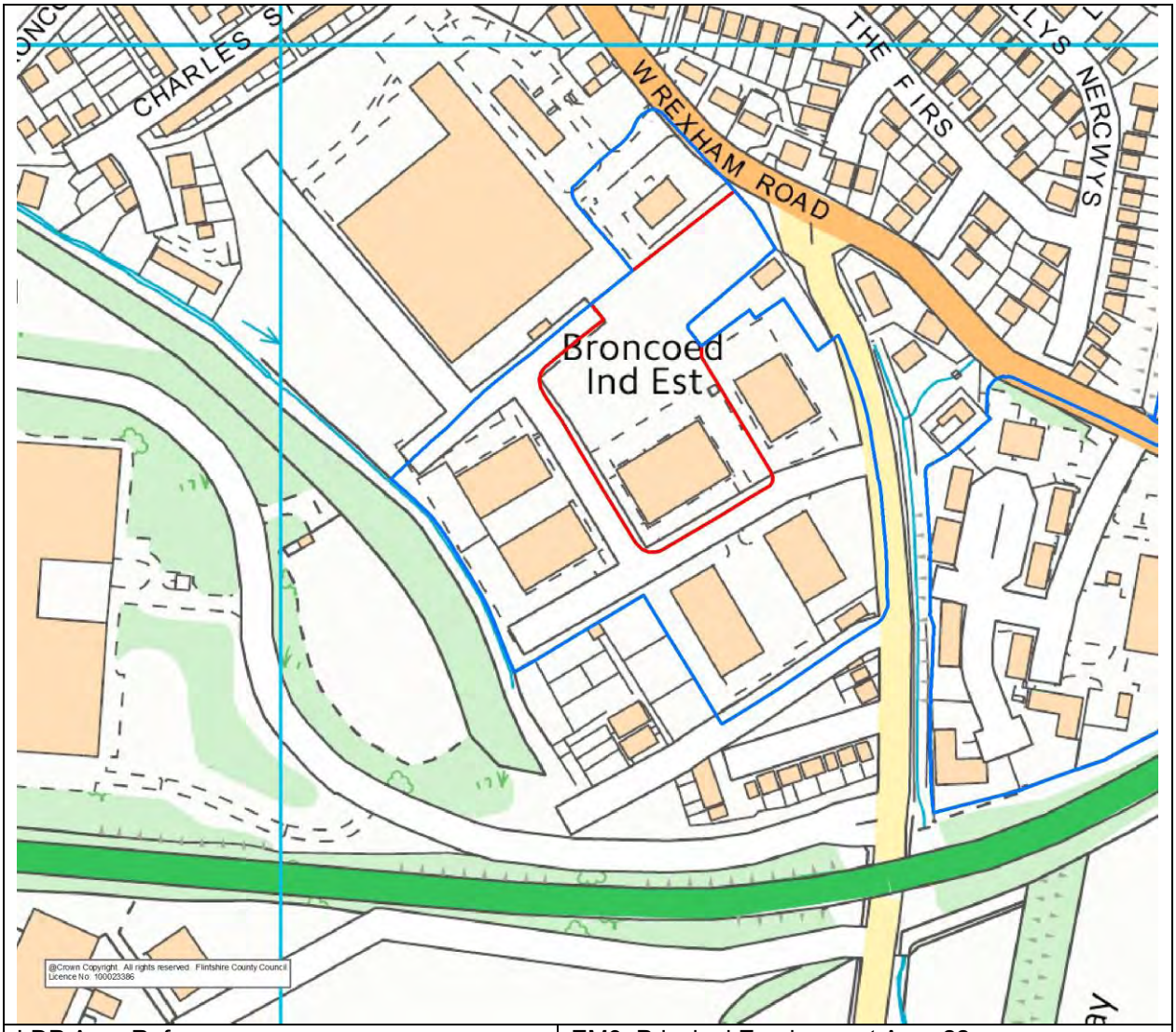
LDP Area Reference	EM3, Principal Employment Area 20
Name	Queensferry Industrial Estate, Pentre
Description	Established industrial estate, one of a series that extend along Factory Road and Chester Road, south of the A494. Comprises large manufacturing facilities to the rear and smaller light industrial space on the Chester Road frontage.
Key Occupier(s)	Headland Group Manufacturing, Knauf Insulation
Prominence	Average
Current Use (Use Classes)	B1 (Class II and III), B2, B8
Size, ha	16.09
Building Age	1945-90, 1990-2000
Building Quality	Average
Constraints	Housing adjacent
Critical Mass	Good
Opportunities for redevelopment/ expansion	Employment site EM1.21 Chester Road East to the north west (3.50 ha) – On the market as design and build plots from 0.40 ha. When developed this will form a northern extension to Queensferry Industrial Estate. All land and premises in use. Area bounded by other uses and railway
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** Established industrial location, part of the wider industrial centre of Chester Road, and accommodating a number of large manufacturing and logistics occupiers. Queensferry Industrial Estate should be protected in the emerging LDP for B Class employment. When developed, employment site EM1.21 Chester Road East should be included in the employment area boundary.



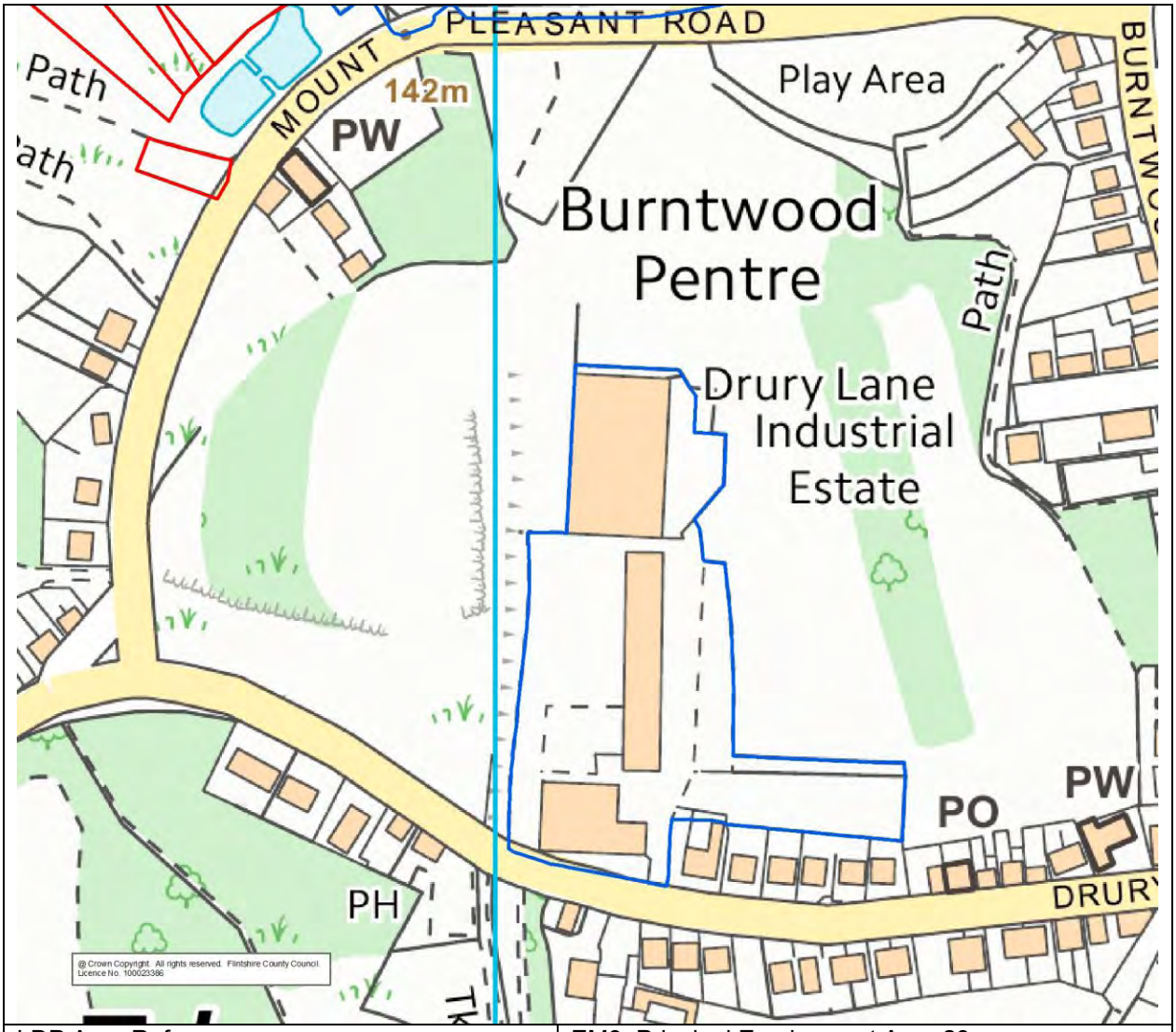
LDP Area Reference	EM3, Principal Employment Area 21
Name	Engineer Park and St Ives Park, Sandycroft
Description	Modern industrial and office park, one of a series that extend along Factory Road and Chester Road, south of the A494.Includes a large factory for Promens and several logistics units
Key Occupier(s)	Promens, Parcelforce, Fedex
Prominence	Average
Current Use (Use Classes)	B1 (Class II and III), B2, B8
Size, ha	26.53
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average
Constraints	Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north Green Space (Policy L3) to the west Housing adjacent
Critical Mass	Good
Opportunities for redevelopment/ expansion	All land and premises in use. Area bounded by other uses, River Dee and Green Space.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** Established industrial location, part of the wider industrial centre of Factory Road, which is the focus for smaller industrial and office premises in Deeside. Area boundary presently includes an area of housing in the south east, fronting the River Dee. This should be excluded from the allocation. The remaining land should be protected in the emerging LDP for B Class employment.



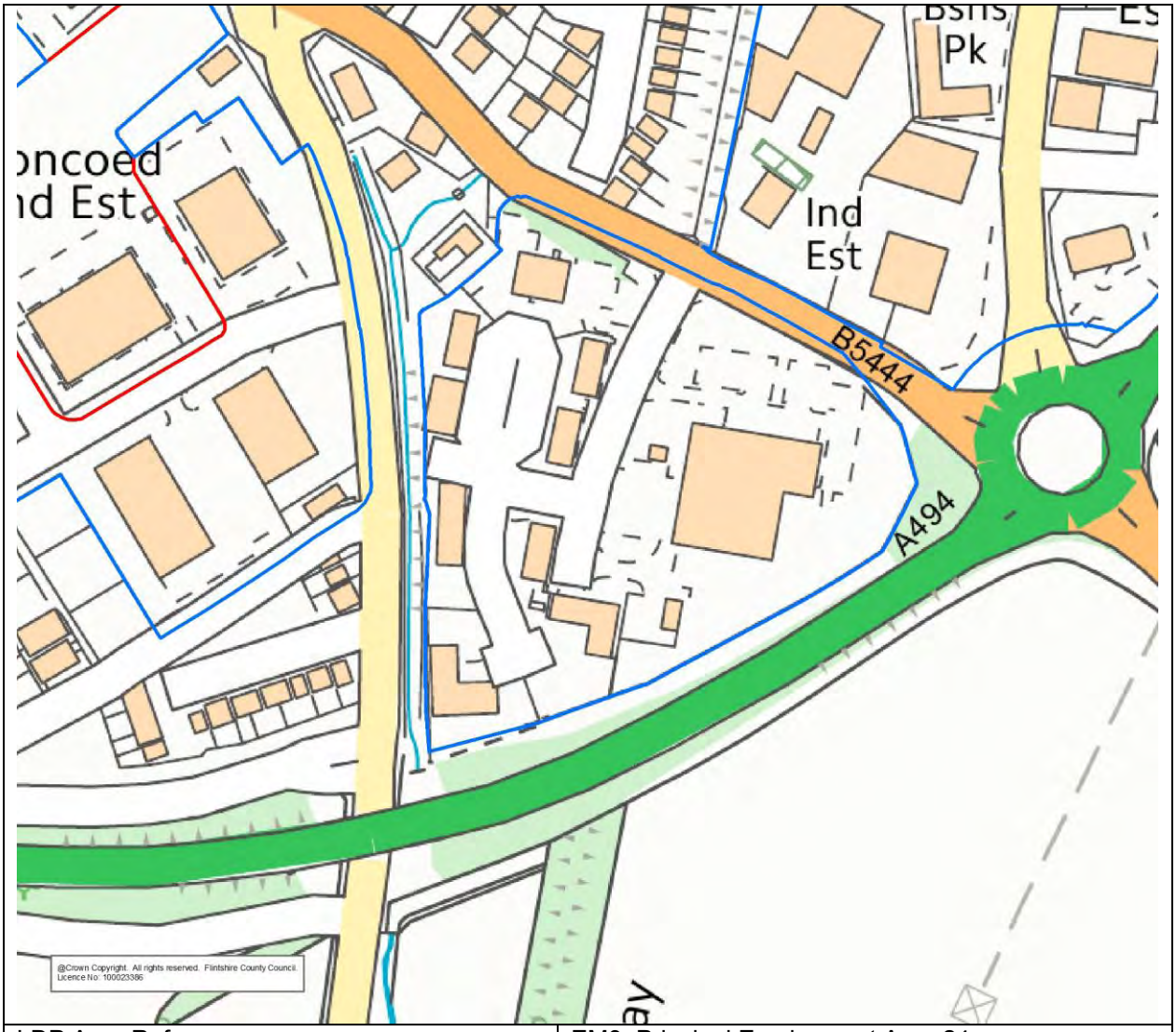
LDP Area Reference	EM3, Principal Employment Area 22
Name	Broncoed Industrial Estate, Mold
Description	Small scheme of some 13 industrial units and two multi-let office properties in an extended courtyard, bounding a housing development site.
Key Occupier(s)	GLS Coatings, Non Stop, Whitley Estates
Prominence	Average
Current Use (Use Classes)	B1(Classes II and III)
Size, ha	3.71
Building Age	1990-2000, 2000+
Building Quality	Good
Constraints	Properties surround land being developed for housing
Critical Mass	Average
Opportunities for redevelopment/ expansion	Vacant land at this location is now being developed for housing. Expansion elsewhere is prevented by surrounding uses.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: B/C** Small, modern and successful local employment area. Provides reasonable quality workshop premises to a range of local firms. Of particular value are the office units to the rear. Despite their backland position, these are a relatively unique property resource in Mold. Bromfield Industrial Estate should be protected in the emerging LDP for B Class employment.



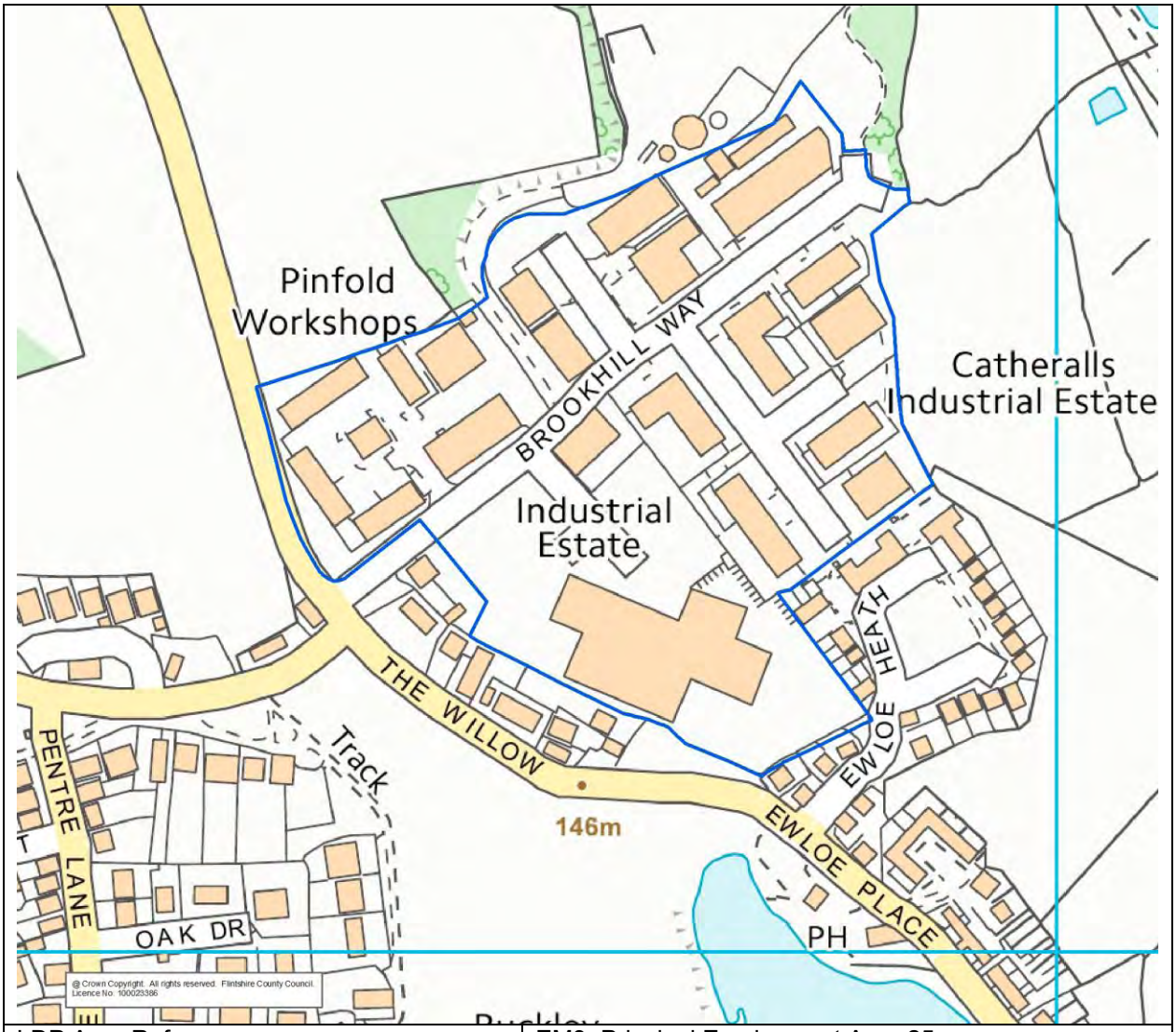
LDP Area Reference	EM3, Principal Employment Area 23
Name	Drury Lane Industrial Estate, Buckley
Description	Linear group of, moderate quality industrial and warehouse units, most in retail and trade use, in a primarily residential area.
Key Occupier(s)	Flintshire Car and Commercial, Gem Retail
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B8, A1
Size, ha	1.19
Building Age	1945-1990
Building Quality	Average
Constraints	Housing adjacent Surrounded by Greenspace (Policy L3) land
Critical Mass	Average
Opportunities for redevelopment/ expansion	Scheme is fully developed and tightly defined. All surrounding land is either housing or protected Greenspace (Policy L3) land.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** A small, but well occupied local employment area. Now functions as a trade and retail park rather than an industrial location and this should be recognised in the emerging LDP.



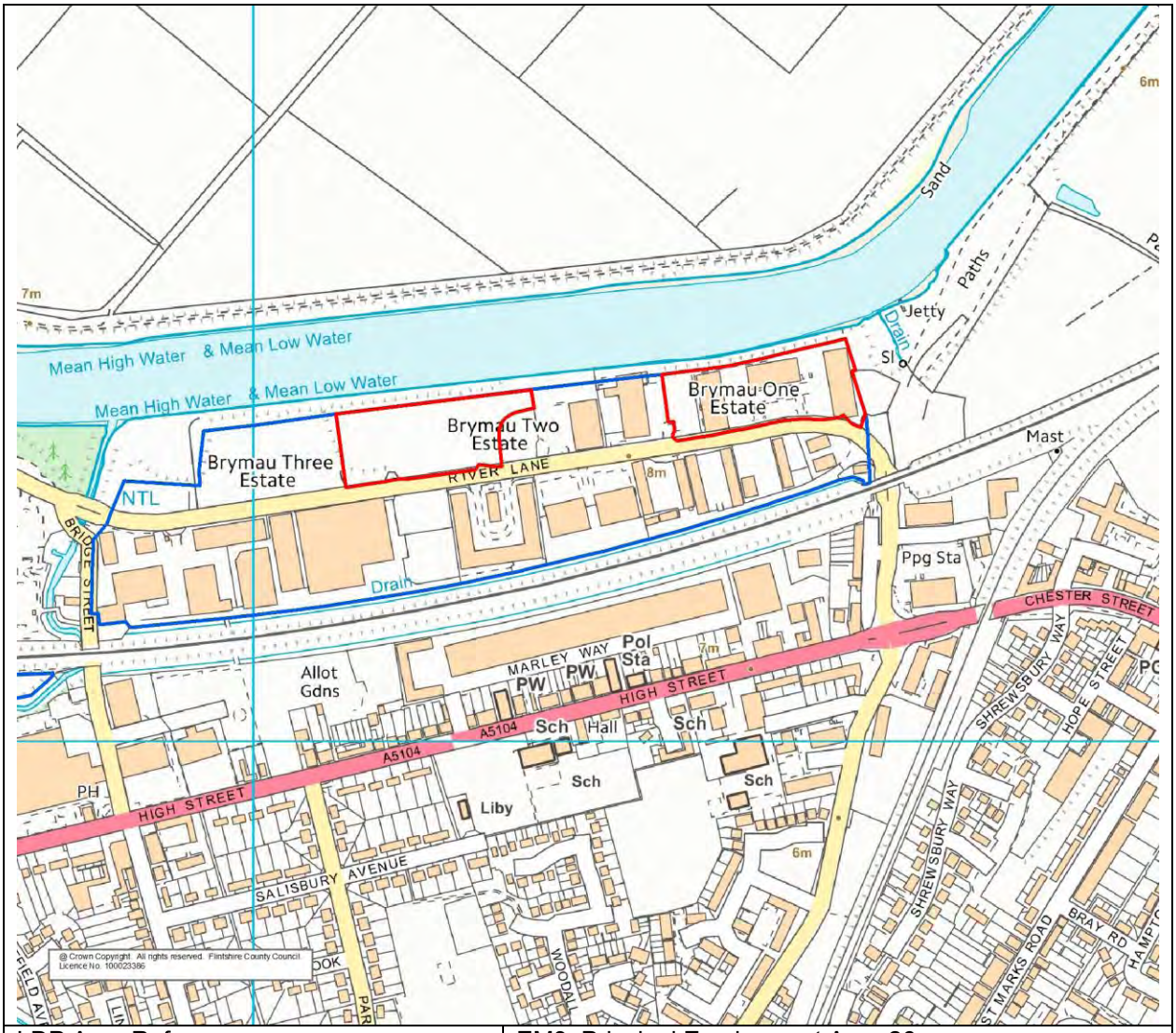
LDP Area Reference	EM3, Principal Employment Area 24
Name	Mold Business Park, Mold
Description	Compact office and industrial park, prominently located off the A494
Key Occupier(s)	NHS, Eisteddfod, GP Fire and Security
Prominence	Good
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	2.96
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	-
Critical Mass	Average
Opportunities for redevelopment/ expansion	Business Park is fully developed and tightly defined by surrounding roads.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: B/C** Key office centre in Mold, which is increasingly established as the centre Flintshire's office market. Of particular value is its stock of self contained office properties. Mold Business Park should be protected in the emerging LDP for B Class employment.



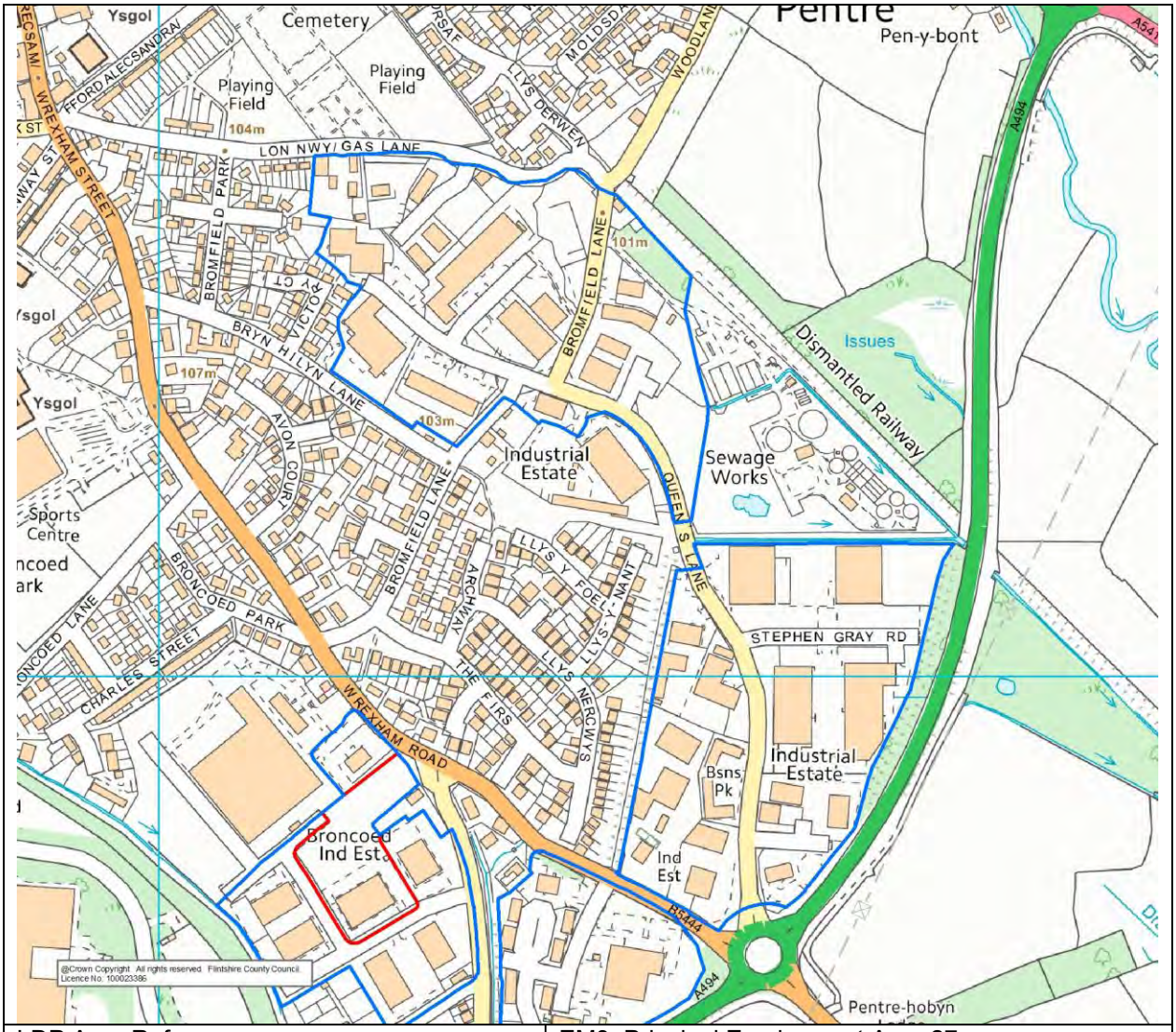
LDP Area Reference	EM3, Principal Employment Area 25
Name	Catheralls Industrial Estate and Pinfold Industrial Estate, Buckley
Description	Catheralls Industrial Estate is an established scheme of mid-sized, good quality industrial and trade units in the north of the Buckley settlement area. Includes a larger trade unit for Jewson in the south. Pinfold Industrial Estate comprises some 35 smaller, moderate quality workshop units in a Council-owned scheme
Key Occupier(s)	Rooms and Views, My Storage Pod, N W T Horseshoes, Jewson, Protech Supplies
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B2, B8, A3 (café)
Size, ha	6.99
Building Age	1990-2000
Building Quality	Good
Constraints	Housing adjacent Greenspaces (Policy L3) and Sites of International Importance/Statutory Sites of National Importance (Policies WB2 and WB3) adjacent
Critical Mass	Good

Opportunities for redevelopment/ expansion	Both schemes appears fully developed, with land in the south east in use for open storage by Jewson. Further expansion would extend the scheme beyond the current Buckley settlement boundary and potentially endanger Sites of International Importance/Statutory Sites of National Importance (Policies WB2 and WB3).
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** The primary industrial estate for Buckley, accommodating a range of established businesses in good quality, modern units. It also provides a substantial workshop scheme, accommodating local start-ups and micro firms. The emerging LDP should protect the existing Catheralls Industrial Estate and Pinfold Industrial Estate, for B Class employment uses. Policy also needs to recognise the presence of trade occupiers at this location.



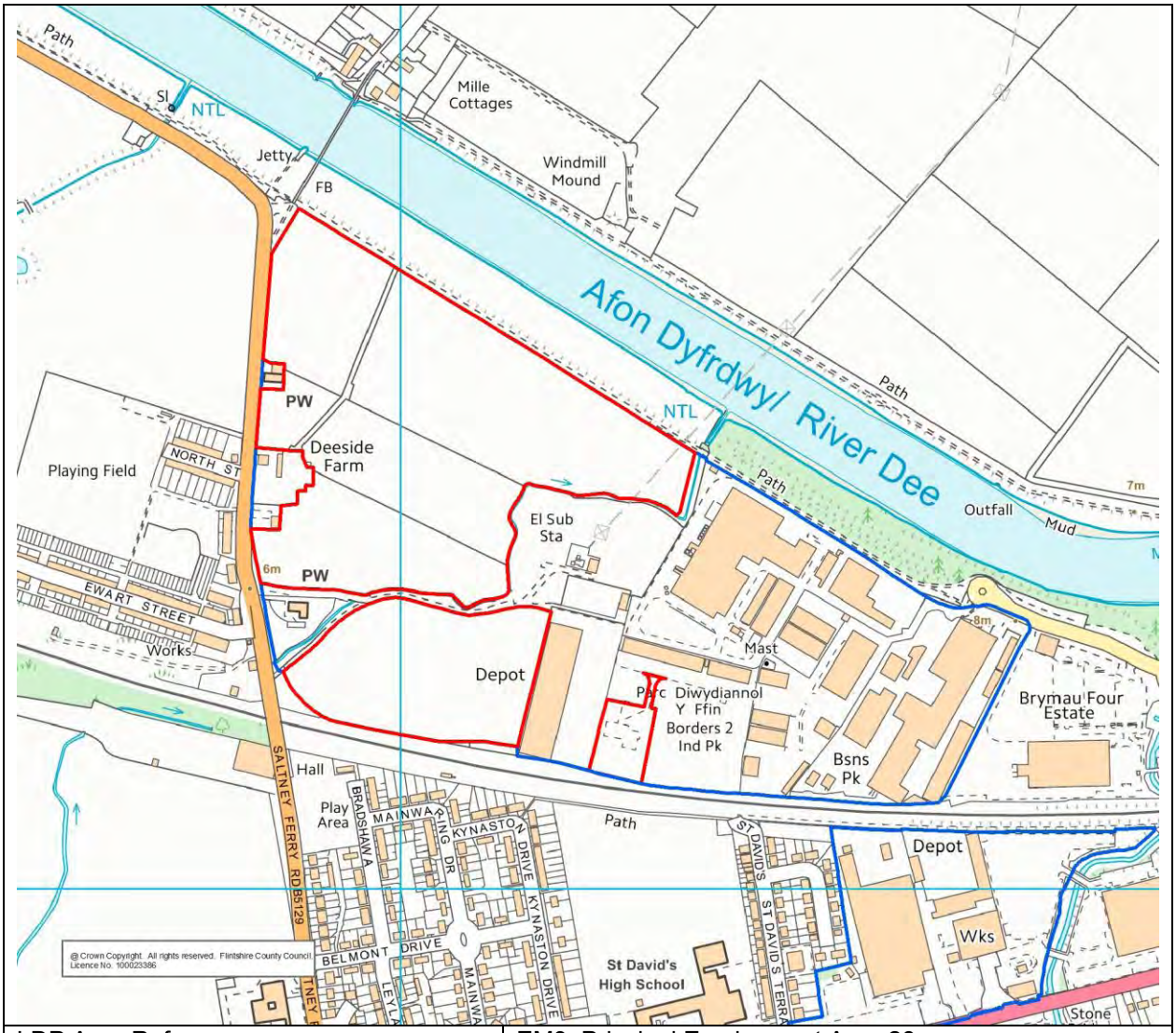
LDP Area Reference	EM3, Principal Employment Area 26
Name	Brynmau One, Two, Three and Four Estates, Saltney
Description	Four adjacent, moderate quality schemes of terraced workshops along with various larger units and open storage sites, in a backland location between the railway line and the River Dee.
Key Occupier(s)	Go Outdoors, EPC
Prominence	Poor
Current Use (Use Classes)	B1 (Class II), B2, B8
Size, ha	12.46
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average
Constraints	Access constrained by narrow tunnels under the railway Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north
Critical Mass	Good
Opportunities for redevelopment/ expansion	The allocated employment site within the area is now developed for industrial units. Land in the north west of the area, to the east of Balderton Brook, comprises various open storage sites which could provide a future development site. Further expansion is prevented by the River Dee and railway line.

Other Information	Within a settlement area An Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C** Group of established industrial schemes in a backland location on the Chester boundary. The location of the employment area and the nature of the local road network means that these schemes more naturally serve the Chester market rather than Flintshire. Some options for further infill development remain here, which should be considered for future employment land allocations. The Brynmau Estates should be protected in the emerging LDP for B Class employment and, reflecting the current situation, a limited element of trade use.



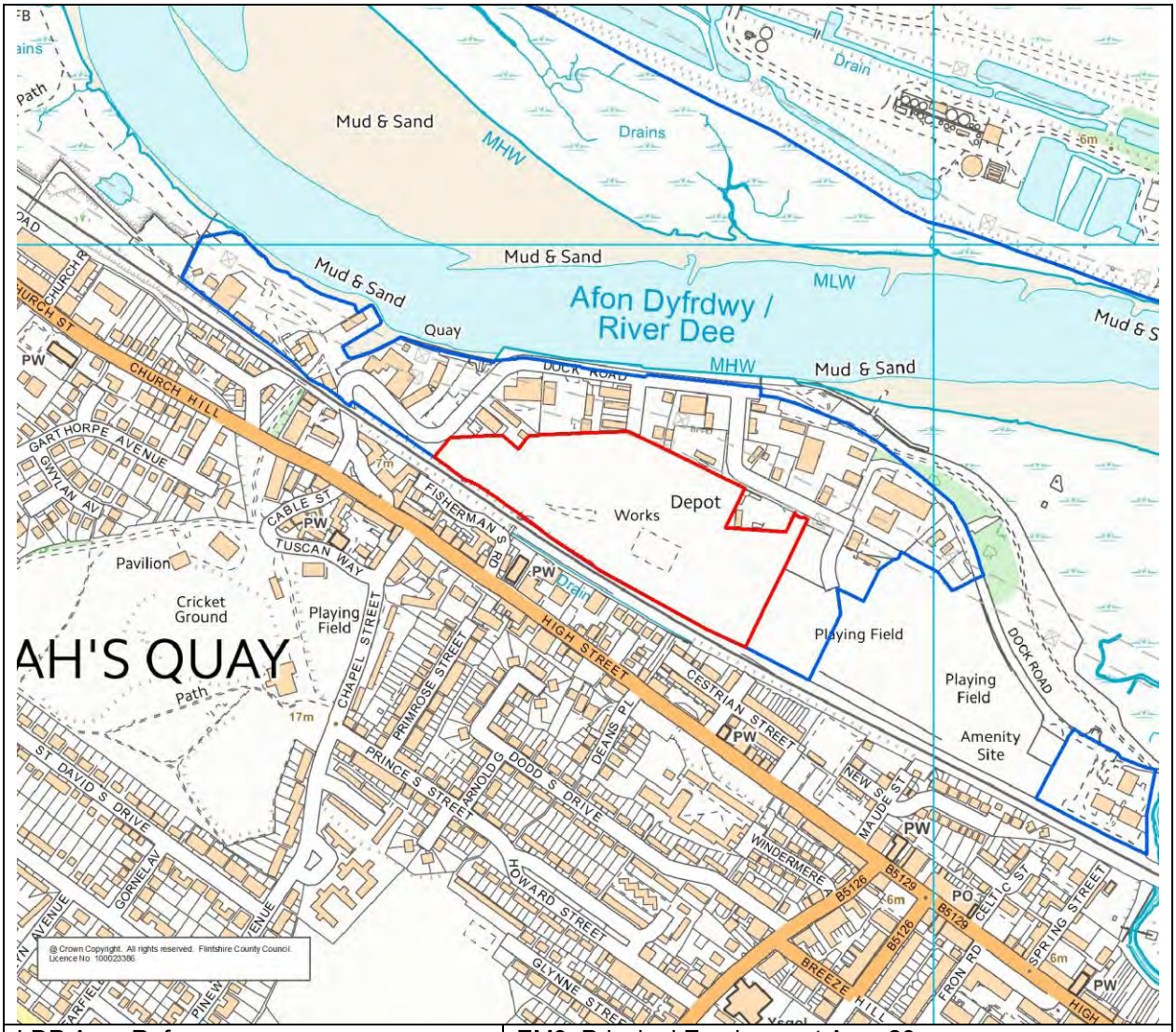
LDP Area Reference	EM3, Principal Employment Area 27
Name	Mold Industrial Estate, Mold
Description	Established business park and industrial estate, split into two sections along Queen's Lane, meeting local property needs particularly for offices and mid-sized industrial premises.
Key Occupier(s)	Wittur, NWN Media,
Prominence	Average
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	8.18
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average
Constraints	Sewage works to the east Bounded by Green Barrier (Policy GEN4) land to the east Housing to the north and west
Critical Mass	Good
Opportunities for redevelopment/ expansion	Fully developed and bounded by the Mold settlement area and the A494.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** The main employment area for Mold, meeting both local needs and accommodating a number of larger businesses. Mold Industrial Estate should be protected in the emerging LDP for B Class employment.



LDP Area Reference	EM3, Principal Employment Area 28
Name	The Borders Industrial Park and Chesterbank Industrial Park, Saltney
Description	Some 77 small workshop units, including recent developments, plus further development land and two larger depots in a backland location between the railway line and the River Dee. Borders Industrial Park also extends to include a large area of Greenfield development land in the west, accessed separately from Saltney Ferry Road.
Key Occupier(s)	First Line Digital, Bostin
Prominence	Poor
Current Use (Use Classes)	B1 (Class II), B2, B8
Size, ha	30.73
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average
Constraints	Access constrained by narrow tunnels under the railway Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north
Critical Mass	Good

Opportunities for redevelopment/ expansion	Cleared land, extending to some 2 ha, is on the market, for sale, in the south west of the developed area. The area also includes EM1.24 Land East of Saltney Ferry Road, Saltney (14.60 ha) – Which is on the market for B1/B2/B8 uses as Ferry Point.
Other Information	Existing developed industrial estate is within the Saltney settlement area, site EM1.24 is outside.
Grading and Recommendations	Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C** Group of established industrial schemes in a backland location on the Chester boundary. The location of the employment area and the nature of the local road network means that these schemes more naturally serve the Chester market rather than Flintshire. Some options for further infill development remain here, which should be considered for future employment land allocations. When developed site EM1.24 will create a new employment area in Flintshire, unconnected to the existing Borders Industrial Park and Chesterbank Industrial Park and this will need to be reflected in policy. The Borders Industrial Park and Chesterbank Industrial Park should be protected in the emerging LDP for B Class employment.



LDP Area Reference	EM3, Principal Employment Area 29
Name	Dock Road, Connah's Quay
Description	Budget quality riverside employment area, surrounding a brownfield employment site any recreation area, north of the main Connah's Quay settlement
Key Occupier(s)	Lee's MOT's, Hallcrest Ltd, Deeside Motorcycles and Scooters, Insanity Extreme Strength and Conditioning
Prominence	Poor
Current Use (Use Classes)	B1 (Class III), B2, B8,D2 Class XVIII (gym), Sui Generis (motor retail)
Size, ha	8.55
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	Areas of high landscape quality associated with the River Dee (Sites of International Importance/Statutory Sites of National Importance/RMSAR/SPA (Policies WB2 and WB3), to the north. Accessed through narrow railway tunnel Pylons cross the area
Critical Mass	Average
Opportunities for redevelopment/ expansion	Includes employment site EM1.8 Crumps Yard, Dock Road a reclaimed former marshalling yard. Elsewhere the area is tightly defined against the river, with little scope for growth without the loss of the adjacent playing fields.

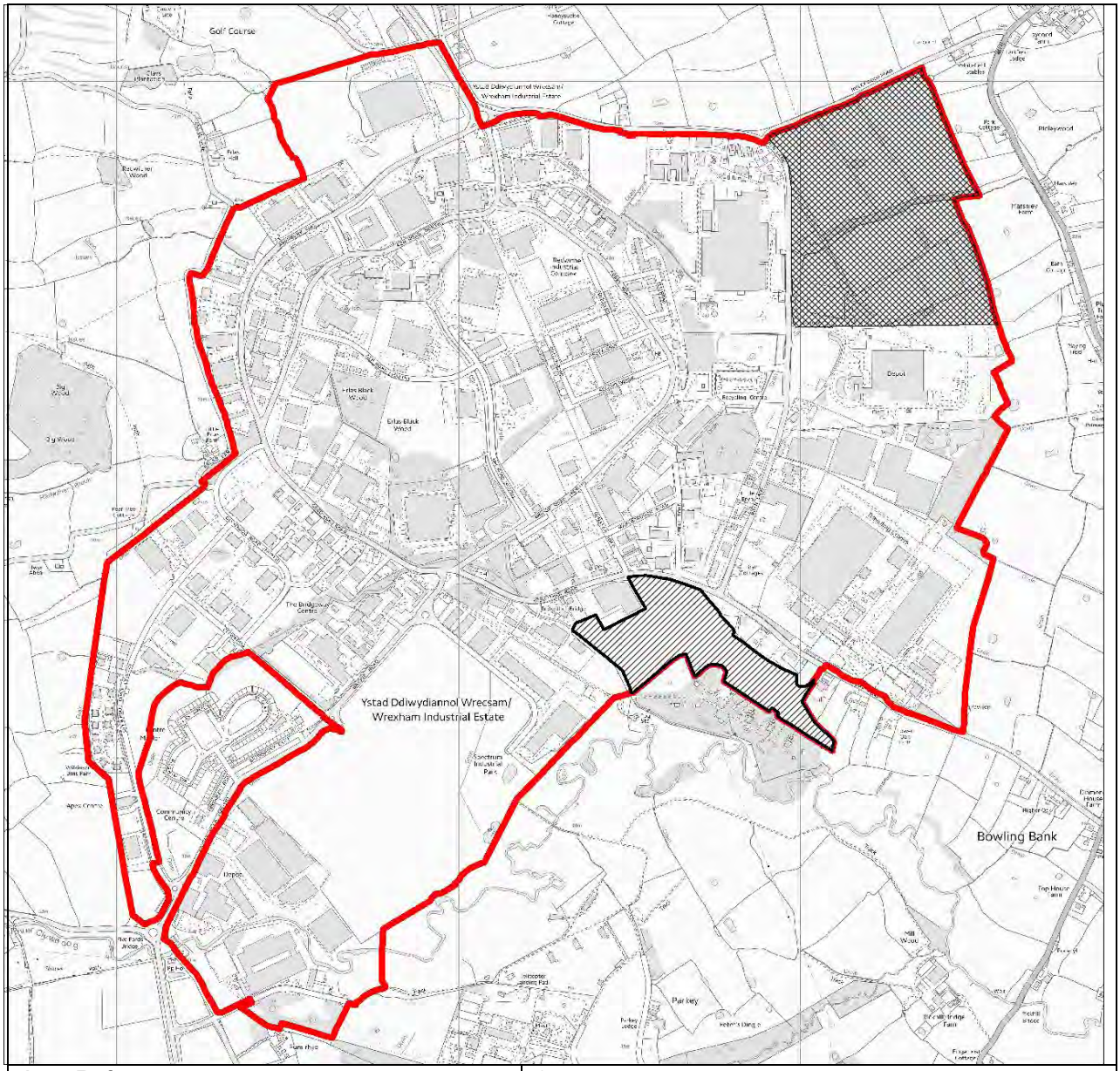
Other Information	Within a settlement area Identified as an Area of Search for New Waste Management Facilities (Policy EWP6)
Grading and Recommendations	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average **Total Grade: C** Budget quality, local industrial estate serving Connah's Quay, and adjacent settlements, and particularly providing car garage and motor trade services. Dock Road should be protected in the emerging LDP for B Class employment and associated trade/motor trade uses.

APPENDIX 10 – WREXHAM EMPLOYMENT AREA PROFORMAS

The employment area proformas relate to areas of developed land and buildings, in B1/B2/B8 use (i.e. the industrial estates and business parks) in the County Borough. These include areas that are principally industrial estates, areas allocated in the UDP for employment purposes, areas with extant permissions together with land in use by large B1/B2/B8 employers. These proformas are linked to the analysis in Section 6.0 of the main Joint Employment Land Review document.

The employment area proformas are different to the Employment Site Proformas included at Appendix 4, in that the latter refers to undeveloped land (or significant redevelopment opportunities), which are allocated for employment purposes primarily under Policy E1 of the Unitary Development Plan.

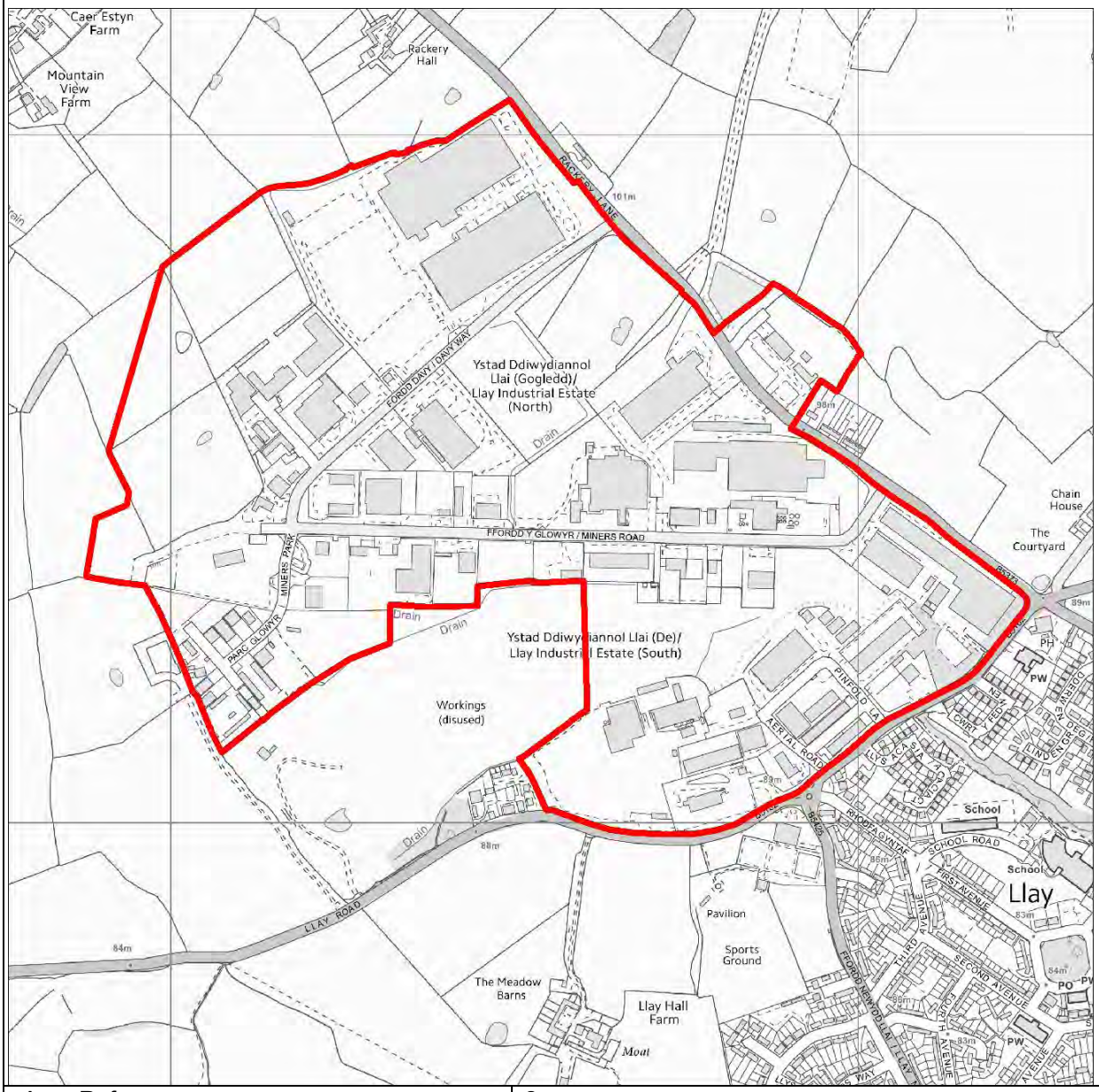
Allocated Employment Areas



Area Reference	1
Name	Wrexham Industrial Estate
Description	One of the largest industrial estates in Europe, presently accommodating some 328 businesses in 520 individual units and providing employment to over 7,000 people. The estate comprises a diverse mix of workshop, larger industrial and warehouse premises along with some 100 offices and 134.56 ha of employment development land. It is located to the south east of Wrexham town with links to the A534 in the north and the A525 to the south. The estate includes various single residential properties, with a residential estate (Pentre Maelor) in the south west, outside of the employment area boundary.
Key Occupier(s)	Kellogg's Calypso Soft Drinks, Mainetti , JCB, Prysmian Cables & Systems, Norbert Dentressangle
Prominence	Average
Current Use (Use Classes)	B1 (Classes II and III), B2, B8, A1 (retail), A2 (bank), A3 (cafes)
Size, ha	513.45
Building Age	Various

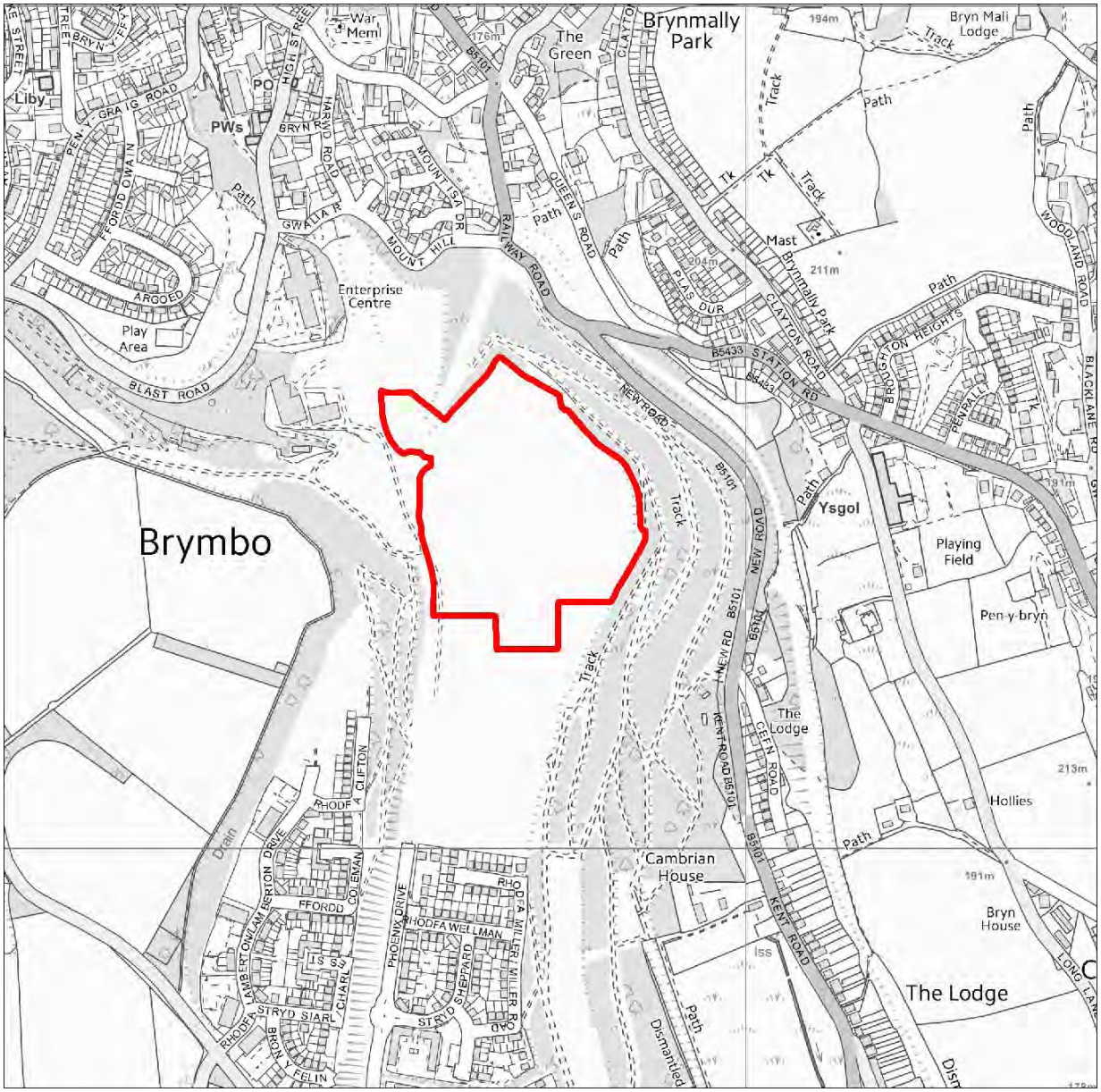
Building Quality	Average
Constraints	Extensive areas of ecological value Pylons cross the site Various footpaths cross the area Includes flood risk areas (Development and Flood Risk, UDP Policy EC12) Green Barrier Land to the west (Policy EC1)
Critical Mass	Good
Opportunities for redevelopment/ expansion	Possible extension of settlement and creation of employment protection area to include the Kingmoor Park site, allocated in the UDP as a single user employment site (Policy E3). The recent appeal decisions here have allowed separate developments on both the northern and southern sections of the site, which is physically divided by a band of mature trees. The principle of development, which is not a single user for the whole site, has therefore been established. The majority of land surrounding the industrial estate is grade 3 agricultural land apart from a small section to the south west, adjoining Clywedog Road South which is grade 2. Any loss of this land to expand the industrial estate would need to be justified. The River Clywedog immediately adjoining the industrial estate to the south east would constrain any expansion in this location The whole of the western boundary of the industrial estate has a Green Barrier designation which would need to be accounted for if any expansion to the estate were to be considered in this location. The area to the south east is a local wildlife area (W337) as shown hatched and is a constraint to future development. Areas to the south west are the nearest and most relevant candidate sites that have been submitted for consideration in the LDP. These are all for mixed use including employment land with ref. numbers WIE05, 06 and 07.
Other Information	Includes the Single User Site allocated under policy E3 of the UDP (36.56 ha) Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Average Environment: Good **Total Grade: A** This is by far the biggest employment area within the County Borough, a focus for major employers and new B Class development. The emerging LDP should protect Wrexham Industrial Estate for B Class employment. The only other developments considered suitable in this area would be for those complementing the existing employment uses in line with local planning policy and Planning Policy Wales. The E3 Single User Site is now part of the developable area of Wrexham Industrial Estate, with various development plans now being progressed. The settlement limit of the estate should therefore be extended to include the E3 land. Conversely if, as seems to be the case, the local wildlife area (W337) is unavailable for any kind of relevant development then this land should be excluded from the settlement area. The Estate is also likely to be a focus for future employment land provision in Wrexham, particularly if much of the existing (viable) employment land is taken up by inward investment, the prison development and existing company expansion in the short and medium term. Several candidate sites have been submitted for consideration for employment uses in the LDP (WIE05, 06 and 07). These include land at the junction of Cefn Road, Bedwell Road and Bridge Road in Wrexham Industrial Estate, which could be considered as a location for further growth.



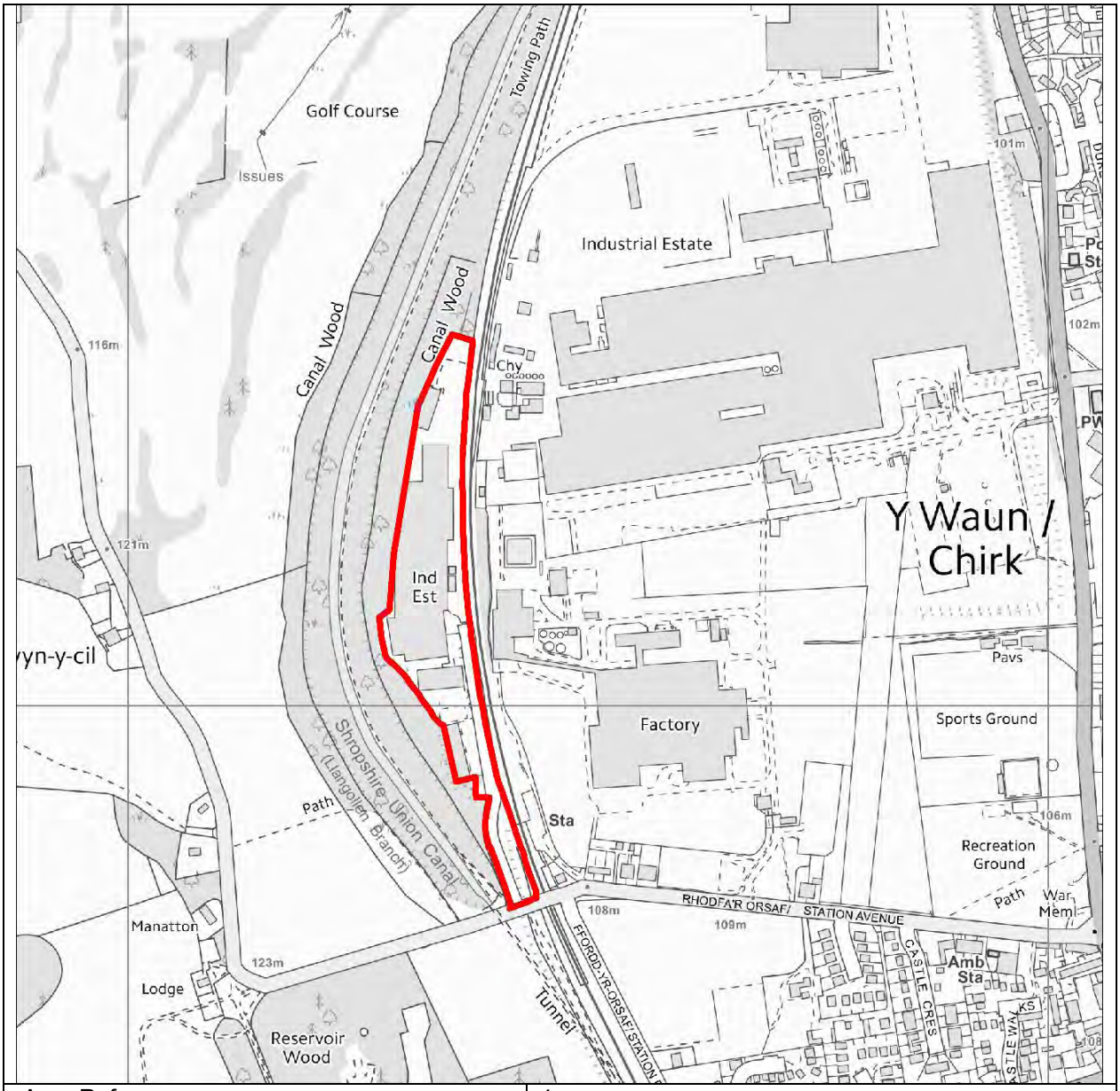
Area Reference	2
Name	Llay Industrial Estate, Llay
Description	Second major employment area in the County Borough, comprising major manufacturing facilities for Sharp and further large industrial properties on the Rackery Lane frontage, along with smaller industrial sites in the south and west. Llay Industrial Estate includes some 16.47 ha of employment land.
Key Occupier(s)	Sharp, Magellan Aerospace
Prominence	Average
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	82.7
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Includes areas of ecological value Land sloping in places
Critical Mass	Good

Opportunities for redevelopment/ expansion	All of the land surrounding the industrial estate is classed as grade 3 agricultural land. Any loss of this land to expand the industrial estate would need to be justified. Llay main Colliery Tip is to the immediate south. The Tip operates intermittently and has a valid permission for such. It is conditioned for restoration. The land levels here are considerably higher than its surroundings and considerable work would be required to make it acceptable for development.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Average Environment: Average **Total Grade: A** This is the second biggest employment area within the County Borough, accommodating two large local employers and a range of small and medium sized firms. The emerging LDP should protect Llay Industrial Estate for B Class employment. The only other developments considered suitable in this area would be for those complementing the existing employment uses in line with Planning Policy Wales. As there is limited scope to expand the estate, the priority is to make maximum use of existing employment land within the estate boundary. Some 6.20 ha south of Sharp is likely to be taken up by the new North Wales Police development, increasing the importance of the 6.40 ha site (Site E1.31) to the north west. Opening up this site for development and overcoming its identified constraints should therefore be a medium to long term priority.



Area Reference	3
Name	Former Steelworks Site, Brymbo
Description	Open plateau development site, in the north of the County Borough, forming part of a wider mixed use scheme in which the adjacent residential elements are now complete.
Key Occupier(s)	N/A
Prominence	Good
Current Use (Use Classes)	N/A
Size, ha	8.00
Building Age	N/A
Building Quality	N/A
Constraints	Reclaimed site Plateau site, with steeply sloping sites
Critical Mass	N/A

Opportunities for redevelopment/ expansion	The area boundary may need to be adjusted to take account of the relevant planning permissions in this area which appear to leave the far southern of the 3 sites available at 2.56ha. There would be scope to expand the industrial area depending upon the intentions of the landowner/developer. The overall aim is to provide sufficient employment opportunities to ensure that Brymbo becomes a sustainable settlement with mixed use development in line with PPW. The following Candidate Sites are also relevant: • BRY15CS: Submitted for consideration as retail - Site currently has an outline application for a supermarket (P/2012/0816) pending. • BRY10CS: - Submitted for consideration as residential in the LDP.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: N/A Accessibility: Average Prominence: Average Environment: Average **Total Grade: N/A** Not currently protected for employment use in the UDP. Proposed to do so for the LDP. Although the owner has retained a long term commitment to this site, they have also continued to defer the B1/B2/B8 development in favour of residential options. It is therefore not clear if this aspect of the development will ever be delivered by the current owners. The decreasing likelihood of an employment development here should therefore be considered by the Council.

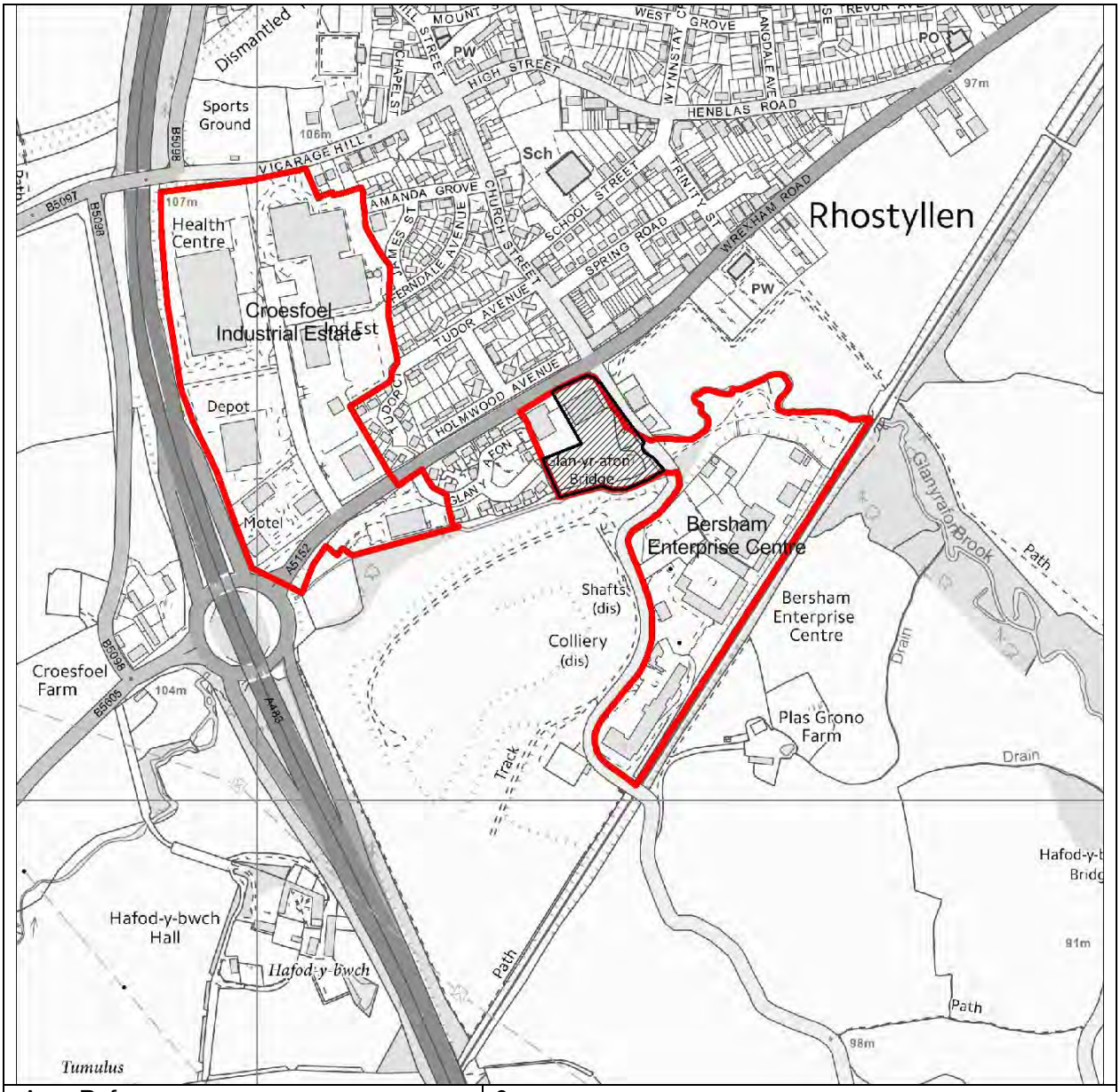


Area Reference	4
Name	Canal Wood Industrial Estate, Chirk
Description	Linear industrial estate comprising nine, moderate quality light industrial units plus larger good quality manufacturing facilities for Richard Burbage. Separated from the larger Chirk Industrial Estate by the railway line.
Key Occupier(s)	Richard Burbage, KG Coatings
Prominence	Moderate
Current Use (Use Classes)	B1 (Class III), B2
Size, ha	Included as part of Chirk Industrial Estate (Site 25)
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	Access constrained by adjacent woodland and railway Green Barrier land (Policy EC1) to the west
Critical Mass	Yes

Opportunities for redevelopment/ expansion	Any expansion would be constrained by the canal to the west and railway line to the east. Given the proximity to Kronospan, residential development would not be appropriate. Other commercial uses may be considered acceptable.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Small, but reasonable quality local industrial estate, serving Chirk and the south of the County Borough. In particular, it is a key source of light industrial space in a settlement otherwise dominated by larger manufacturing facilities. The emerging LDP should protect Canal Wood Industrial Estate for B Class employment and appropriate ancillary uses.

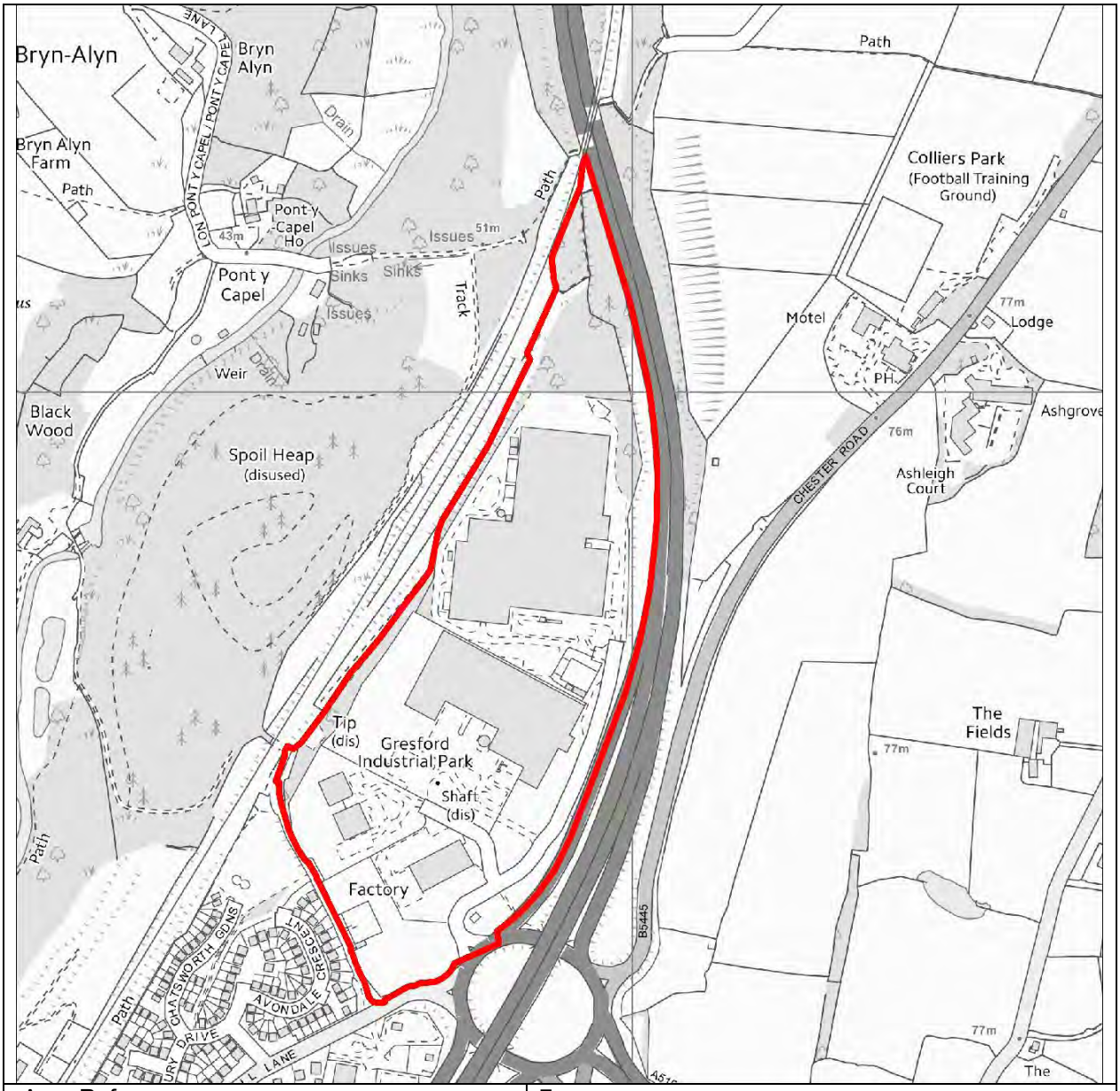
Area Reference	5
Name	Vauxhall Industrial Estate, Johnstown
Description	Established local industrial estate comprising mostly older, moderate or budget quality premises. Includes both larger B2 manufacturing premises and a range of smaller units including Vauxhall Business Centre
Key Occupier(s)	Brother, Flint Group
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B2, B8
Size, ha	23.70
Building Age	1945-90, 1990-2000
Building Quality	Poor-Average
Constraints	Green Barrier land (Policy EC1) to the west and south Site of ecological value (Monks Pool) to the south Stryt Las A'r Hafod Site of Special Scientific Interest to the east The Ruabon to Wrexham railway line, which adjoins the site to the east.
Critical Mass	Good

Opportunities for redevelopment/ expansion	Any expansion constrained by residential immediately to the north and north west, railway line to the east, existing employment area adjoins to the west and south west and Monks Pool to the south. Outline permission has been granted for a supermarket (P/20120210) in the far north west of the site (shown hatched), which if and when developed will have an impact upon the overall size of the employment area. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate, unless specific evidence indicates otherwise.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Poor **Total Grade: C** Substantial, established local industrial estate serving settlements in the west of the County Borough. The estate provides a good mix of industrial premises, ranging from business centre workshops to larger B2/B8 properties. Although the quality of some premises is not high the estate is broadly well occupied and includes some large employers such as Brother. The emerging LDP should protect Vauxhall Industrial Estate for B Class employment. Sites with prominent Ruabon Road frontage may be appropriate for a more diverse range of uses including trade and (limited) retail options, reflecting the foodstore consent.



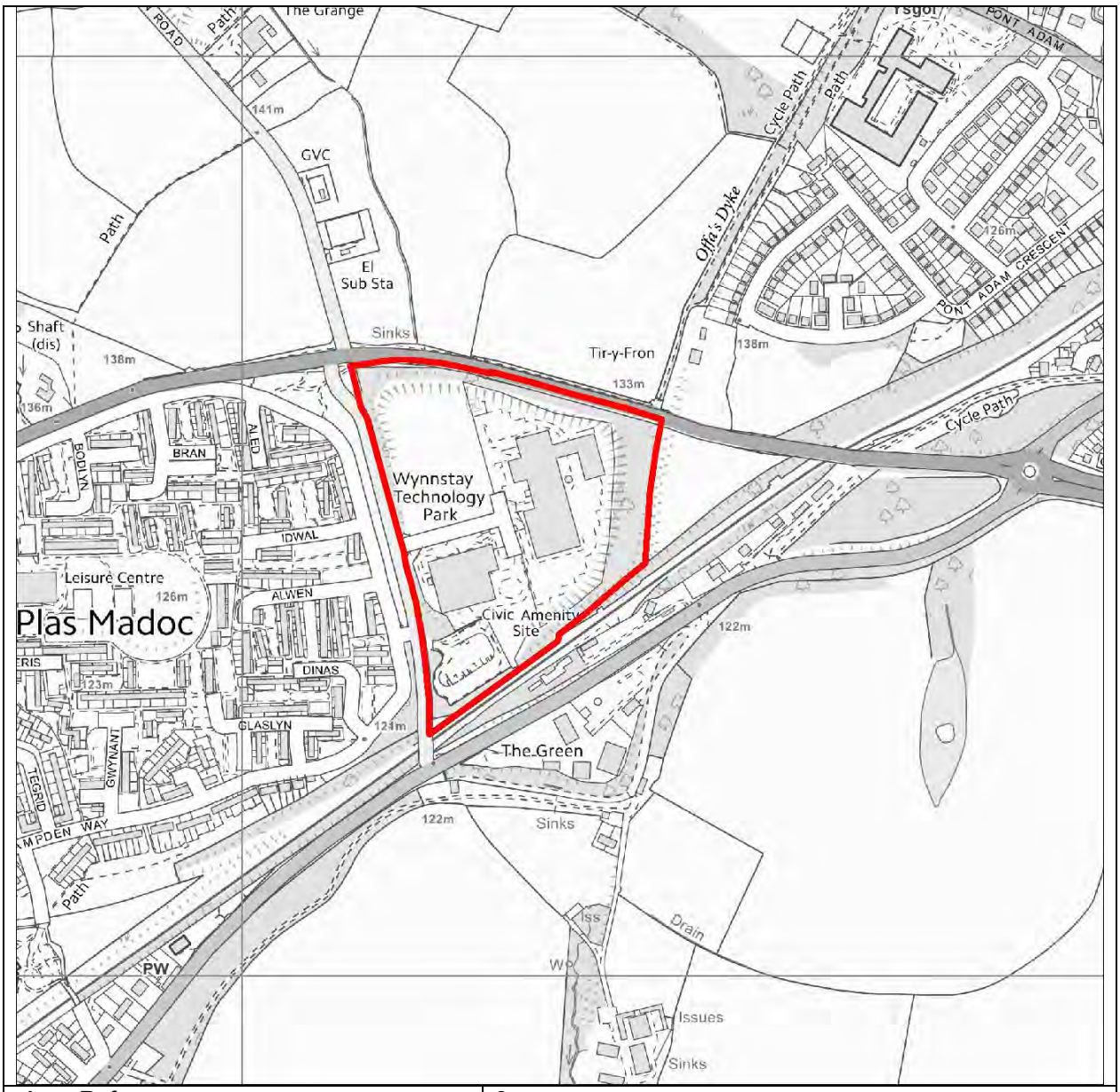
Area Reference	6
Name	Croesfoel Industrial Estate and Bersham Enterprise Centre, Rhostyllen/Bersham
Description	Two employment areas, located north and south of the A5152 Wrexham Road. Croesfoel Industrial Estate offers a range of modern premises, including motor trade uses in the south and larger trade, logistics and manufacturing premises in the north, prominently located off the A5152. Also includes a small roadside services area (petrol filling station, hotel and hot food) on the frontage. Bersham Enterprise Centre is a converted coal mine complex providing a range of smaller business accommodation, including some 17 small business units.
Key Occupier(s)	Vauxhall, Peugeot, Huws Gray, Charles Owen, CTM
Prominence	Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre)
Current Use (Use Classes)	B1 (Class III), B2, B8, A3 Food and Drink (Little Chef),C1 hotel (Travelodge) Sui Generis (Esso Petrol Filling Station and motor retail)
Size, ha	17.00

Building Age	2000+ (Croesfoel Industrial Estate) pre-1945, 1990-2000, 2000+ (Bersham Enterprise Centre)
Building Quality	Good (Croesfoel Industrial Estate) Average (Bersham Enterprise Centre)
Constraints	Bersham Enterprise Centre is accessed via a narrow rural road off the A5152 Wrexham Road
Critical Mass	Good
Opportunities for redevelopment/ expansion	Western section: Expansion constrained by A483 to the west, residential development to the east, POS to the north. Colliery Spoil lies to the south and is candidate site RT03CS for mixed use, which is currently being considered for its suitability. Eastern section: Land to the far west, shown hatched has outline permission for residential development (P/2012/0377) granted in 2012 and should therefore be excluded from any employment area. Candidate Site RT03CS adjoins to the south west. Expansion to east, south east constrained by railway line. Expansion to north constrained by presence of trees, Glanyrafon Brook and a major housing development, which has technically commenced. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) Prominence: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) Environment: Good (Croesfoel Industrial Estate) Poor (Bersham Enterprise Centre) **Total Grade: B/C** Croesfoel Industrial Estate is increasingly dominated by trade and motor trade uses, with roadside services on the frontage. Only the northern part of the site is in conventional B2/B8 employment use. The Council should consider separating these three distinct parts of the Industrial Estate, in the emerging LDP, with the goal of protecting the larger industrial/warehouse premises in the north (notably the Charles Owen facility) from loss to alternative uses. Bersham Enterprise Centre is performing well. Hurstwood Group report that all but one of the 17 modern units they own is now let. The Enterprise Centre is a key source of light industrial space in western Wrexham and the emerging LDP should protect it for B Class employment.



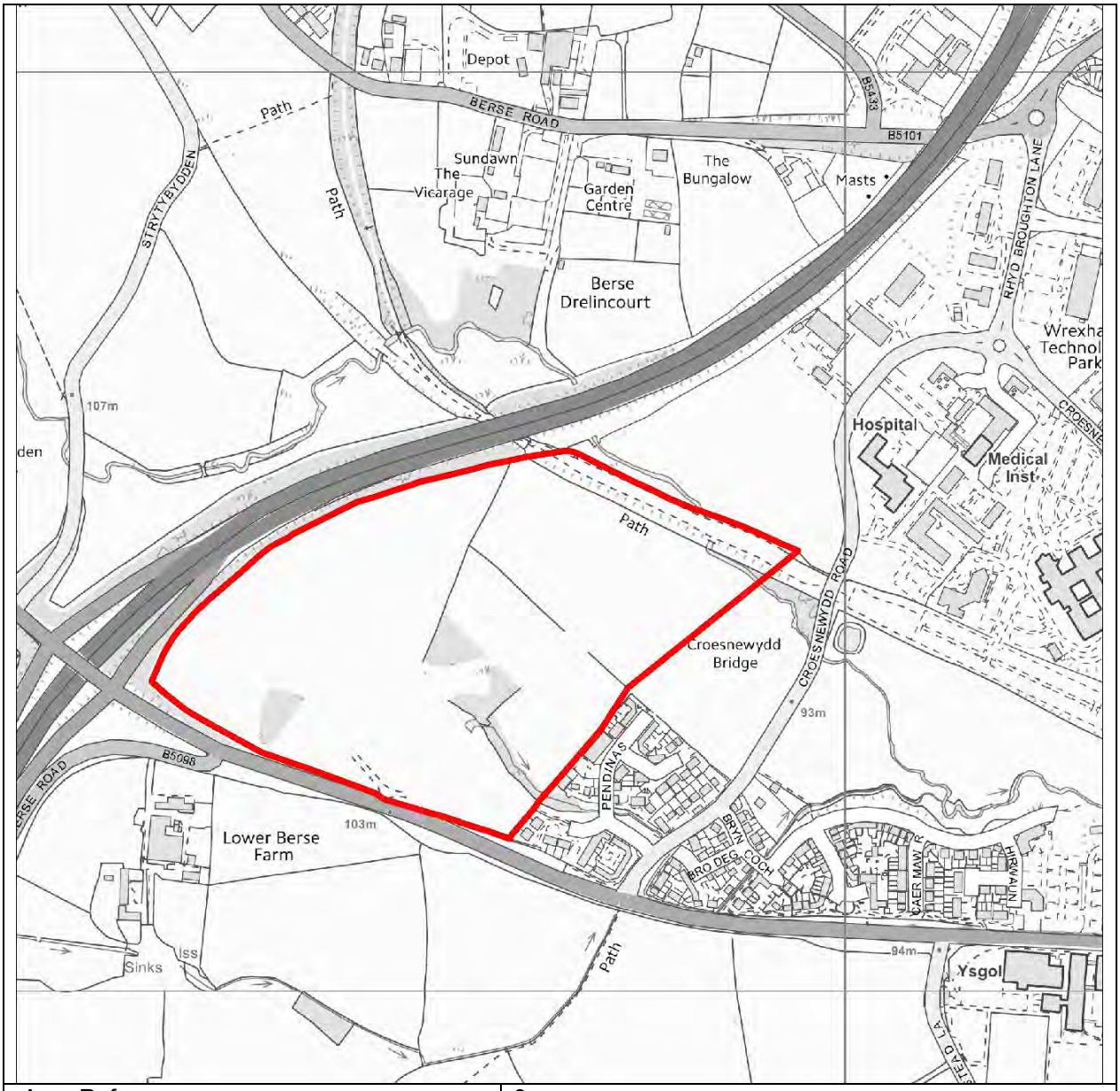
Area Reference	7
Name	Gresford Industrial Estate, Wrexham Town
Description	A group of larger, modern manufacturing and warehouse units prominently located off the A483
Key Occupier(s)	Appe, Simon Boyd Textiles, Benders Paper, McCarthy Distribution
Prominence	Good
Current Use (Use Classes)	B2, B8
Size, ha	18.15
Building Age	1990-2000, 2000+
Building Quality	Good
Constraints	Green Barrier land (Policy EC1) to the east
Critical Mass	Yes
Opportunities for redevelopment/ expansion	Expansion constrained by A483 along south east, east and north eastern boundaries, railway line on the west and north west boundaries and residential development to the south west.
Other Information	Within a settlement area

Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: B** Established group of large employers prominently located of the main A483 route through Wrexham. The areas should therefore receive a strong degree of protection in the emerging LDP.



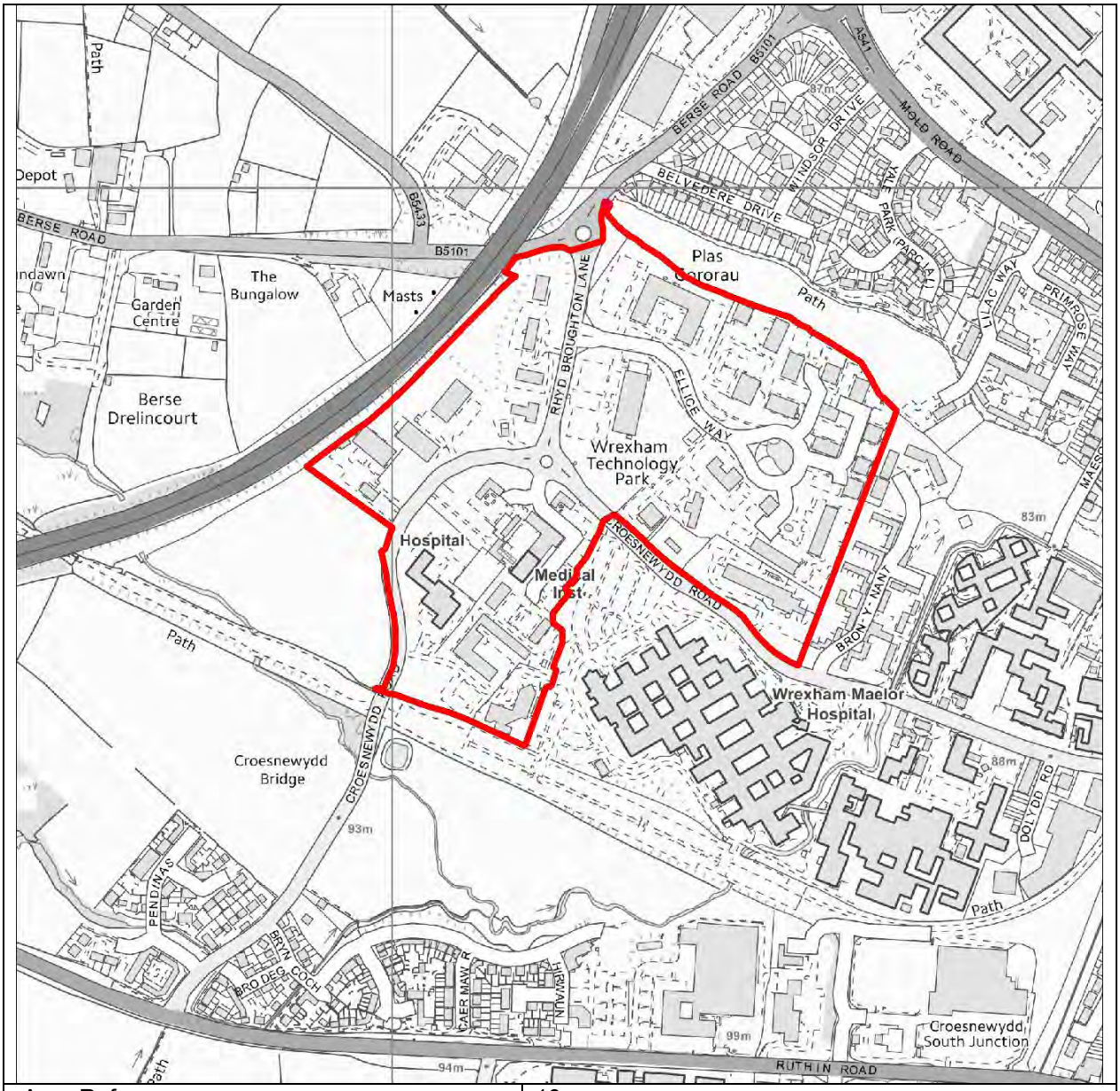
Area Reference	8
Name	Wynnstay Technology Park, Cefn/Acrefair
Description	Two modern industrial units, plus a 1.40 ha expansion site, located at an edge of settlement location, close to the A539 Llangollen Road and the B5605 Park Road. Includes a household waste site in the south.
Key Occupier(s)	Wrexham Mineral Cables
Prominence	Average
Current Use (Use Classes)	B2
Size, ha	8.42
Building Age	2000+
Building Quality	Good
Constraints	Green Barrier land (Policy EC1) to the east and north
Critical Mass	Poor

Opportunities for redevelopment/ expansion	Expansion constrained by the railway line to the south, housing to the west and Green Barrier and Agricultural land grade 3 to the north and east. The Green Barrier is important in this location as it prevents coalescence between Ruabon and Acrefair/Cefn Mawr. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate. Remaining area of land was subject to an application for residential development which was dismissed at appeal (P/2006/0907).
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Good Prominence: Good Environment: Good **Total Grade: C** Small, modern employment area with limited scope to grow. The emerging LDP should protect Wynnstay Technology Park for B Class employment.



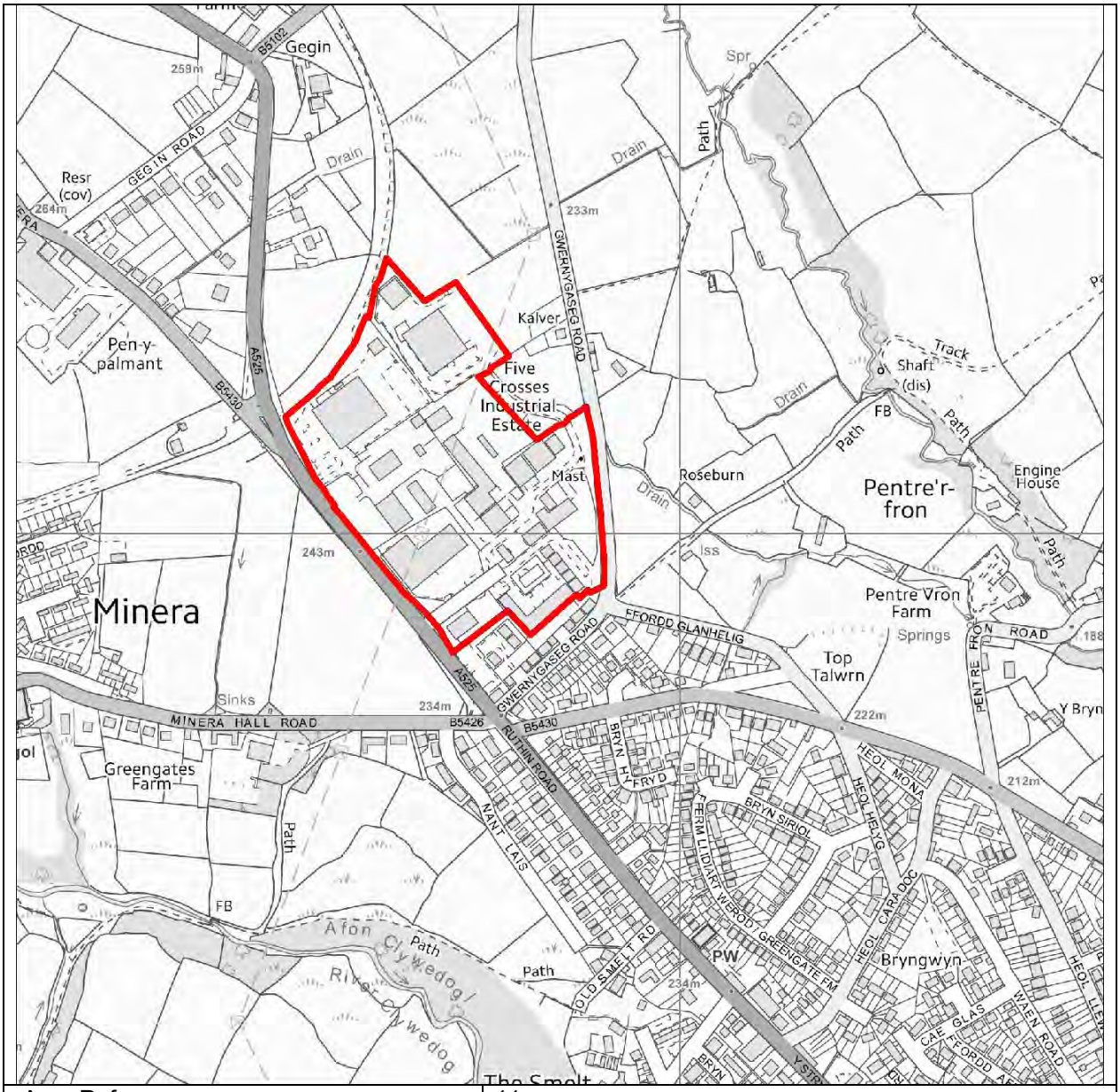
Area Reference	9
Name	Wrexham Western Gateway, Wrexham Town
Description	Major greenfield development site in the south of Wrexham Town, with A525 and A483 access.
Key Occupier(s)	N/A
Prominence	High
Current Use (Use Classes)	N/A
Size, ha	14.78
Building Age	N/A
Building Quality	N/A
Constraints	Trees onsite Various public footpaths pass through the site River Gwenfro pass through the site Various ecological issues, to be addressed through the provision of ecological mitigation land.
Critical Mass	N/A

Opportunities for redevelopment/ expansion	Constrained by A483, grade 2 agricultural land, green barrier and minerals buffer to the north west. North east and south east is partly developed for residential and has permission for residential. Land to the south west is being considered as candidate site WR20CS for mixed use. Employment limited to high quality B1 uses.
Other Information	Within a settlement area Application P/2012/0059 clarifies the total site area to be 23.62 ha, of which 8.80 ha is designated as employment development land and 6.42 ha is proposed for housing A further 8.13 ha will be set aside for ecological mitigation, providing a new wildlife and recreation corridor with links to Wrexham Town Centre Various infrastructure changes are proposed including realignments and a new roundabout for the A525 (towards its junction with the A483) and associated access and spine roads Additional footpaths/cycleways to be provided, linking Wrexham Technology Park and the Hospital. The employment element of this site is discussed further in the Employment Site Analysis in Section 6.0 of the main report.
Grading and Recommendations	Critical mass: N/A Accessibility: Good Prominence: Good Environment: Good **Total Grade: A (If successfully developed)** A prestige employment site for the County Borough, prominently located on the edge of Wrexham Town. Strong interest from a developer for an office scheme which will take up much of the 8.80 ha available. Wrexham Gateway will form a third phase of Wrexham Technology Park and should be protected in the emerging LDP as part of the Park. As is discussed in the main report, current market demand does not support the provision of further employment land at this location.



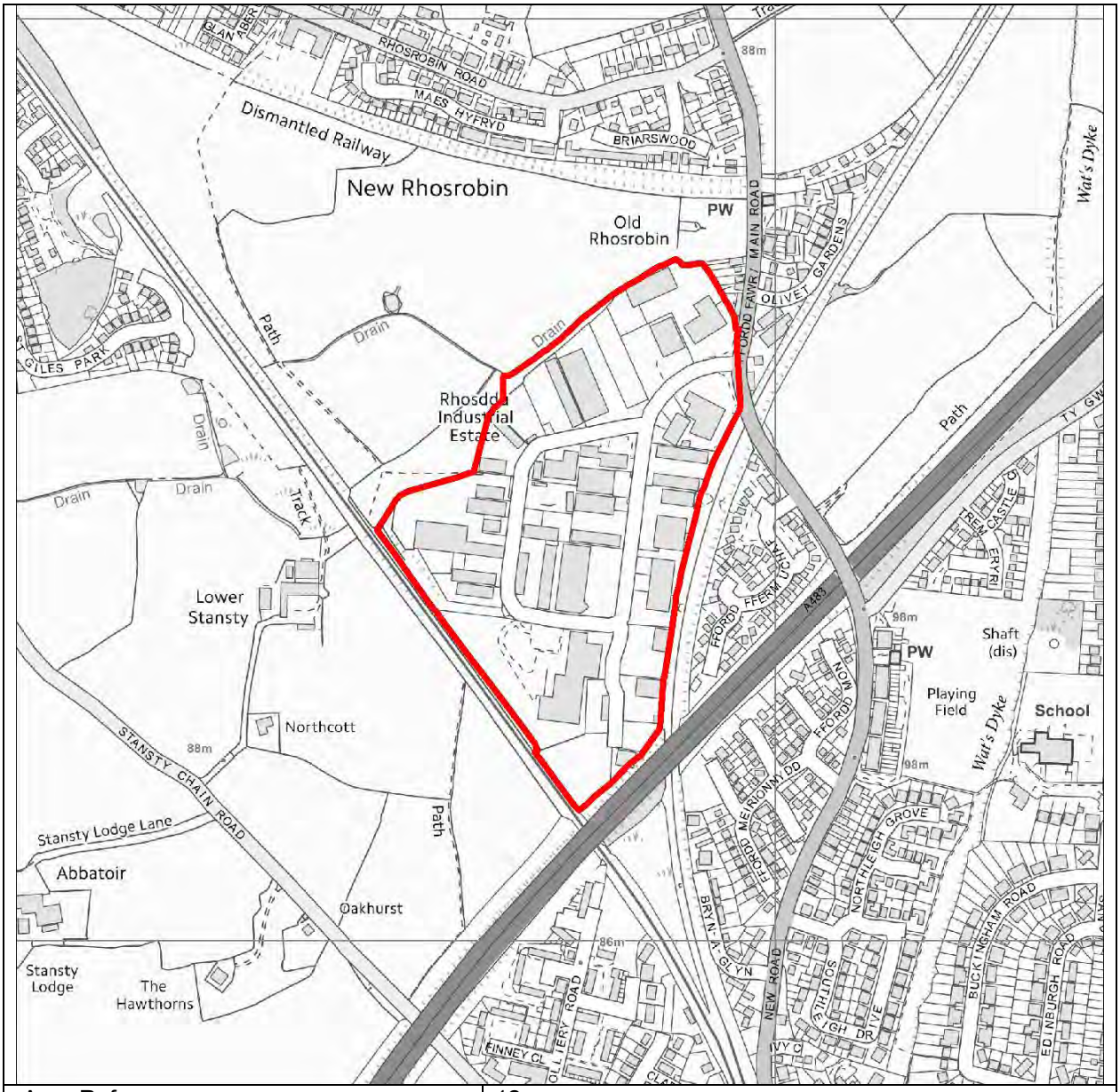
Area Reference	10
Name	Wrexham Technology Park, Wrexham Town
Description	Dispersed modern office park, located in the south of Wrexham Town north of Wrexham Mellor Hospital and including a number of clinical, education and support facilities in the medical sector. Also includes a hotel.
Key Occupier(s)	Moneypenny, Wrexham County Borough Council, Appe, Gap Personnel, Bangor University of Wales (The School of Healthcare Sciences), Spire Yale Hospital
Prominence	Good
Current Use (Use Classes)	B1 (Class II), C1 Hotel (Ramada), C2 Residential Institutions (Class XIV)/ D1 Non-Residential Institutions Class XV (hospital support facilities), D1 Non-Residential Institutions Class XVI (Bangor University of Wales School of Healthcare Sciences)
Size, ha	23.30
Building Age	2000+ (primarily)
Building Quality	Good

Constraints	-
Critical Mass	Good
Opportunities for redevelopment/ expansion	Constrained by A483, grade 2 agricultural land, green barrier and minerals buffer to the north west, POS to north east, existing development to south east and permission for residential development to south west.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good **Total Grade: A** A prestige employment site for the County Borough, and the only high quality office park in Wrexham (outside of Wrexham Industrial Estate at least). The Park accommodates a range of major employers, at least one of whom has significant growth and consolidation plans within the wider Wrexham gateway area. In practice Wrexham Technology Park incorporates a mix of uses including medical (clinical and support facilities) and education uses, which appear well integrated into the economy of the area and could not be easily separated out in spatial planning policy. Alongside Wrexham Gateway, Wrexham Technology Park should receive a high degree of protection in the emerging LDP. However, planning policy also needs to recognise the relatively diverse range of uses at this location.



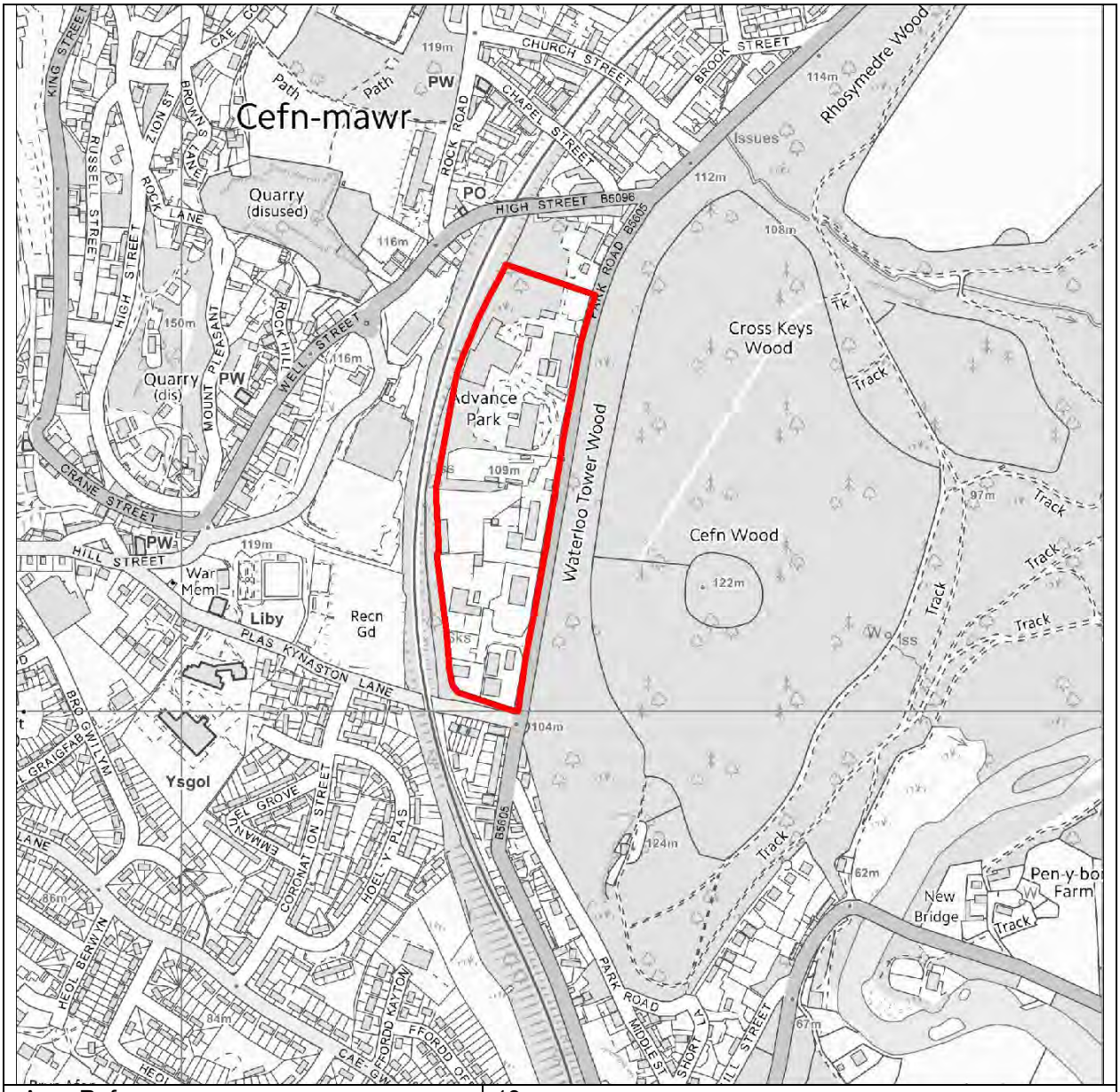
Area Reference	11
Name	Five Crosses Industrial Estate, Coedpoeth
Description	Established local industrial estate comprising premises for larger employers in the north and a scheme of light industrial units (Council owned, at least in part) in the south, with some units in trade/motor trade use.
Key Occupier(s)	Village Bakery, FWB
Prominence	Good
Current Use (Use Classes)	B1 (Class II and III), B2, B8, Sui Generis
Size, ha	7.91
Building Age	1945-1990, 1990-2000
Building Quality	Average
Constraints	Green Barrier land (Policy EC1) to the west and north
Critical Mass	Good

Opportunities for redevelopment/ expansion	Green barrier adjoins to north and south west. Existing housing present to south east. Expansion beyond Gwernygaseg Road to east would be an illogical extension to any settlement boundary. Potential to extend employment area to the north, this has permission for a new unit in connection with Tomlinson's Dairies. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: B/C** Established local industrial estate accommodating a mix of larger businesses and smaller (primarily) local light industrial occupiers. Space is older and of moderate quality, but appears well occupied and successful. Five Crosses Industrial Estate should be protected in the emerging LDP for B Class employment uses. Reflecting reality an element of trade use should also be permitted, particularly on sites with main road frontage.



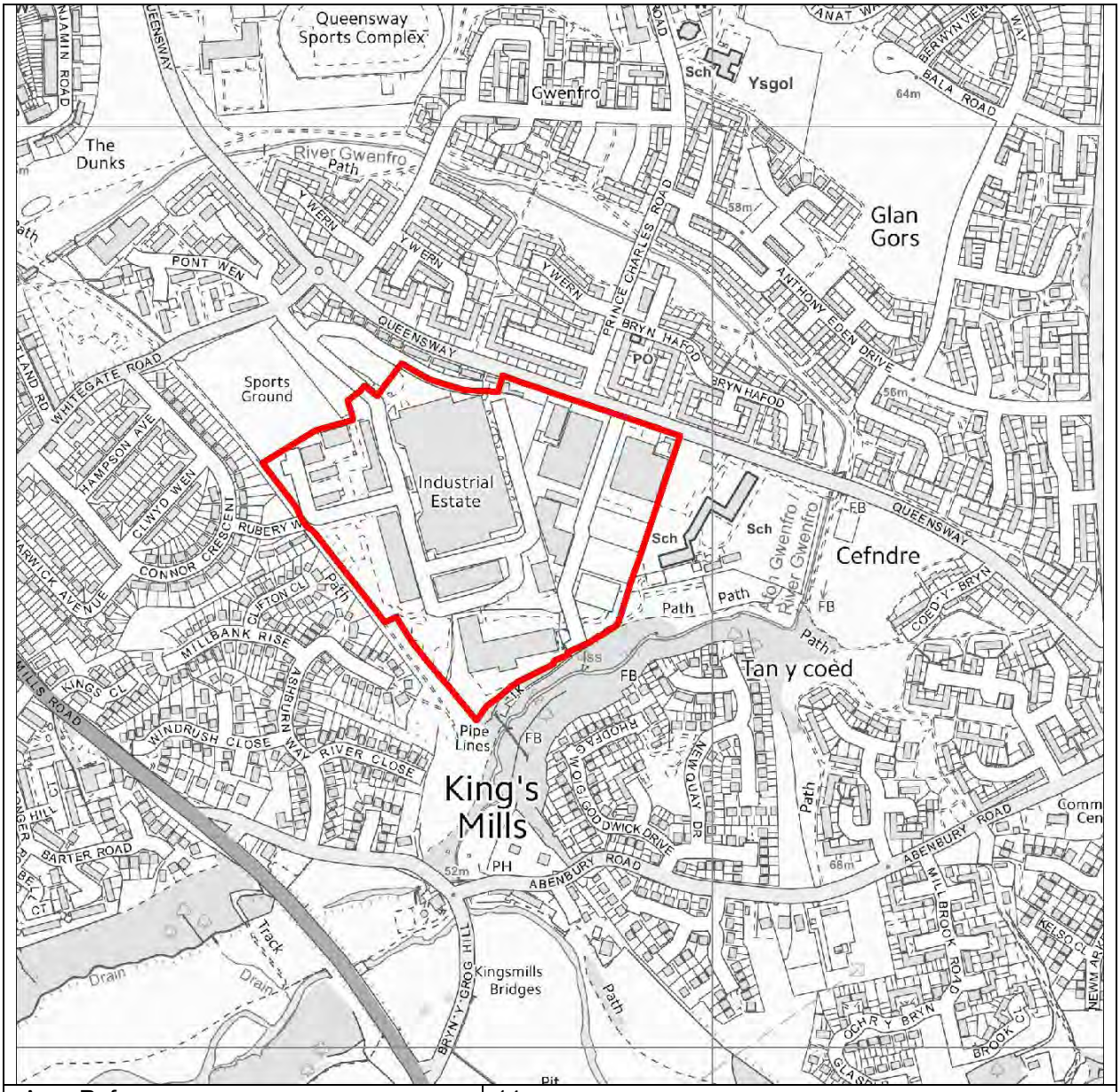
Area Reference	12
Name	Rhosddu Industrial Estate, Wrexham Town
Description	Large established industrial estate, providing moderate quality accommodation to a range of small and mid-sized companies. There are retail and motor trade uses on the main road frontage.
Key Occupier(s)	Yodel, CES UK, ToolPak
Prominence	Good
Current Use (Use Classes)	B1 (Class III), B2, B8, A1, Sui Generis (motor retail)
Size, ha	12.91
Building Age	1990-2000, 2000+
Building Quality	Average
Constraints	Green Barrier land (Policy EC1) to the west and south
Critical Mass	Good
Opportunities for redevelopment/ expansion	Constrained to south west by railway line, A483 to south east and railway line to east. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.

Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Good Prominence: Good Environment: Average **Total Grade: B/C** Large, established local industrial estate providing reasonable quality space to a range of small and mid-sized companies. Rhosddu Industrial Estate should be protected in the emerging LDP for B Class employment uses. Policy also needs to reflect the fact that the main road frontage is in use for motor trade and retail uses.



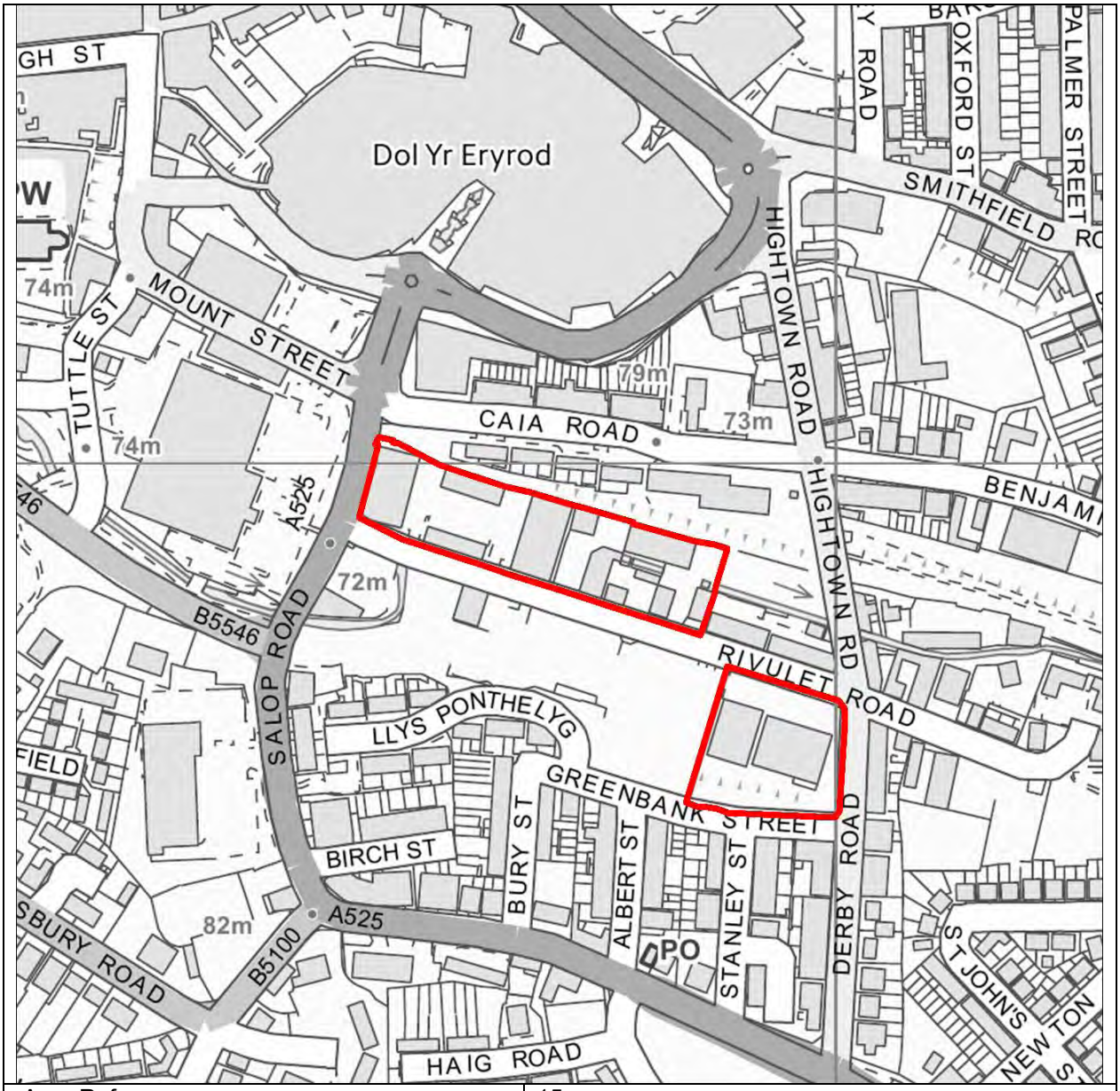
Area Reference	13
Name	Advance Park Industrial Estate, Rhosymedre, Cefn/Acrefair
Description	Group of older industrial premises, dispersed along Park Road and comprising a mix of light industrial, trade and retail uses, most of budget quality
Key Occupier(s)	Advance Enterprises, B&M Construction
Prominence	Good
Current Use (Use Classes)	B1 (Class III), B2, B8, A1, Sui Generis (motor retail)
Size, ha	6.11
Building Age	Pre-1945, 1945-1990
Building Quality	Poor (primarily)
Constraints	Special Landscape Area (Policy EC5) to the east
Critical Mass	Average

Opportunities for redevelopment/ expansion	No potential for expansion, railway line adjoins west boundary, existing development adjoins to south and mature trees adjoin to east. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor **Total Grade: C/D** The overall built quality of this area is low (with the exception of the Advance Enterprises building) and some properties in the north appear partly/wholly vacant and near derelict. The area could benefit from investment but continues to serve a function, providing budget quality premises to a mix of users including the local construction centre, motor retail and roadside services. Advance Park Industrial Estate should be protected in the emerging LDP for B Class employment and appropriate trade and service options. However, it could also be usefully identified as a future site for regeneration investment, if appropriate given other policy priorities.



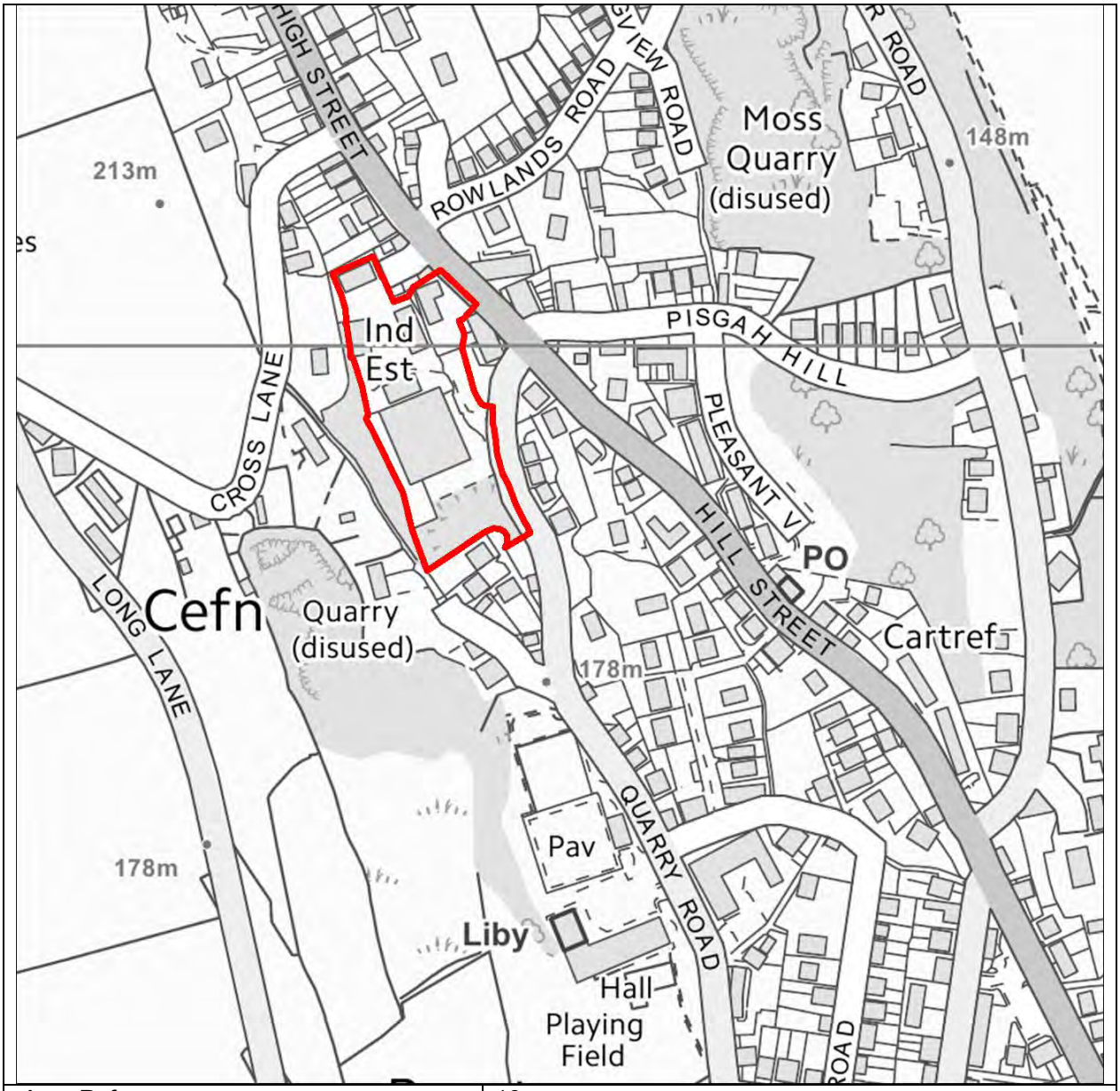
Area Reference	14
Name	Whitegate Industrial Estate, Queensway, Wrexham Town
Description	Moderate quality, Council-owned industrial estate in the eastern residential suburbs of Wrexham town. The estate comprises smaller workshop and office premises in the west with larger units, including a sub-divided factory complex, in the east.
Key Occupier(s)	Wrexham Youth Justice Service, Ellison
Prominence	Average
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	10.10
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Sports ground to the north west Housing adjacent
Critical Mass	Good

Opportunities for redevelopment/ expansion	No potential for expansion bounded by POS, existing development and the River Gwenfro. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Good Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Established local industrial estate serving Wrexham town and providing a good mix of workshop, office, larger industrial and storage accommodation. Although its residential location means that the location is unsuitable for some heavy industrial and high volume logistics uses, the scheme appears well occupied with some evidence of more recent investment and development. Whitegate Industrial Estate should be protected in the emerging LDP for B Class employment uses.



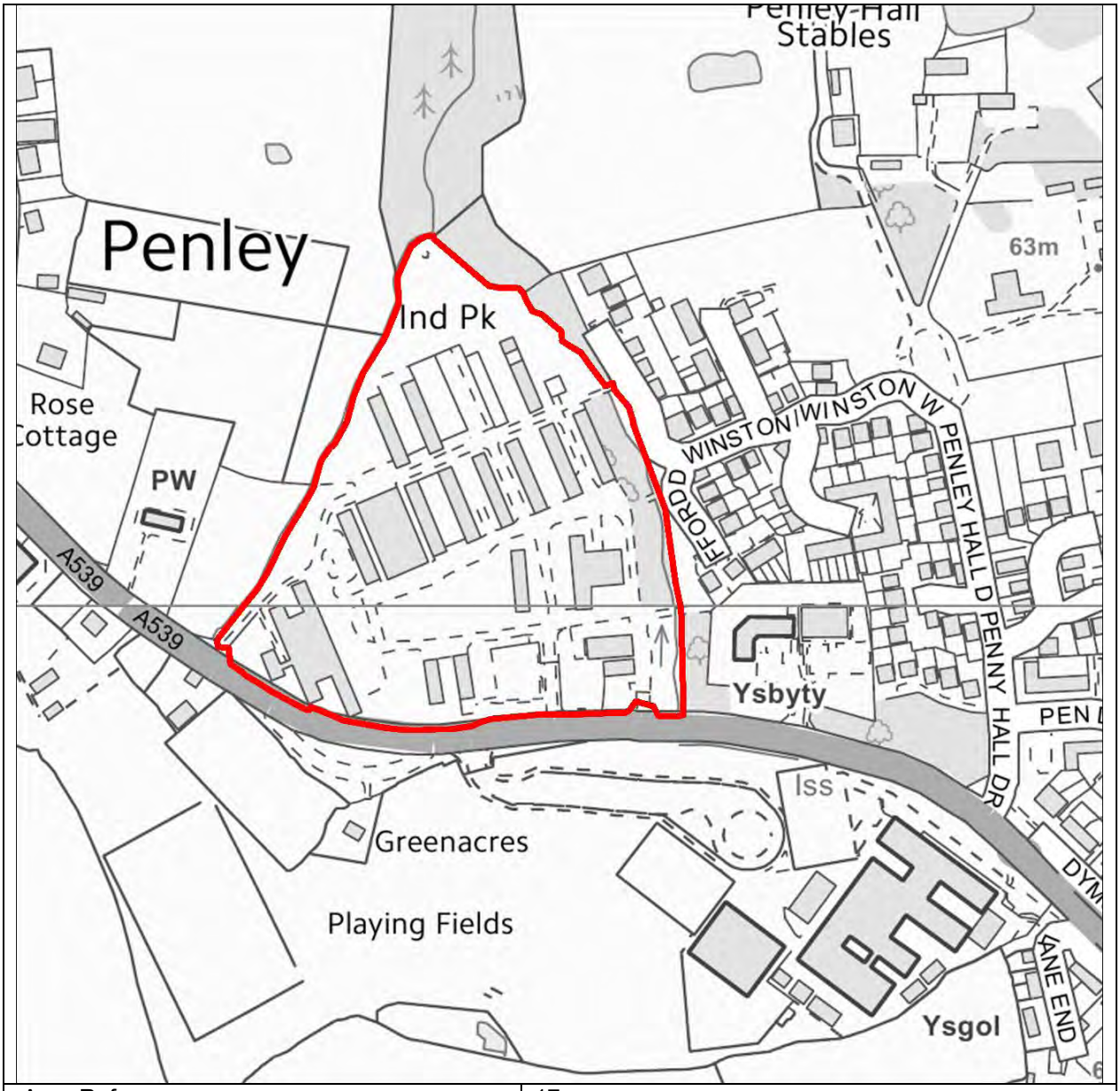
Area Reference	15
Name	Cambrian Price Industrial Estate, Rivulet Road, Wrexham Town
Description	Small, linear industrial area, centrally located in Wrexham town and comprising a group of industrial units (most in trade use) and a number of older, budget quality brick built workshops.
Key Occupier(s)	Topps Tiles, Northern Glass, CEF
Prominence	Poor
Current Use (Use Classes)	B1 (Class III), B8, Sui Generis (motor trade)
Size, ha	1.40
Building Age	1945-90
Building Quality	Average-Poor
Constraints	In a flood risk area (Policy EC10)
Critical Mass	Poor
Opportunities for redevelopment/ expansion	On the edge of the town centre. No opportunities for expansion - surrounded by development. Potential to be released for other uses.
Other Information	Within a settlement area Includes units south of Rivulet Road (0.49 ha)

Grading and Recommendations	Critical mass: Poor Accessibility: Average Prominence: Poor Environment: Poor **Total Grade: D** Small, mostly budget quality employment area, occupied by a range of trade businesses and motor garages. Most premises are occupied and the area continues to meet business needs. However, the economic value of the location is limited and in the long term the industrial estate can be considered as a redevelopment opportunity, capable of meeting other needs within central Wrexham.



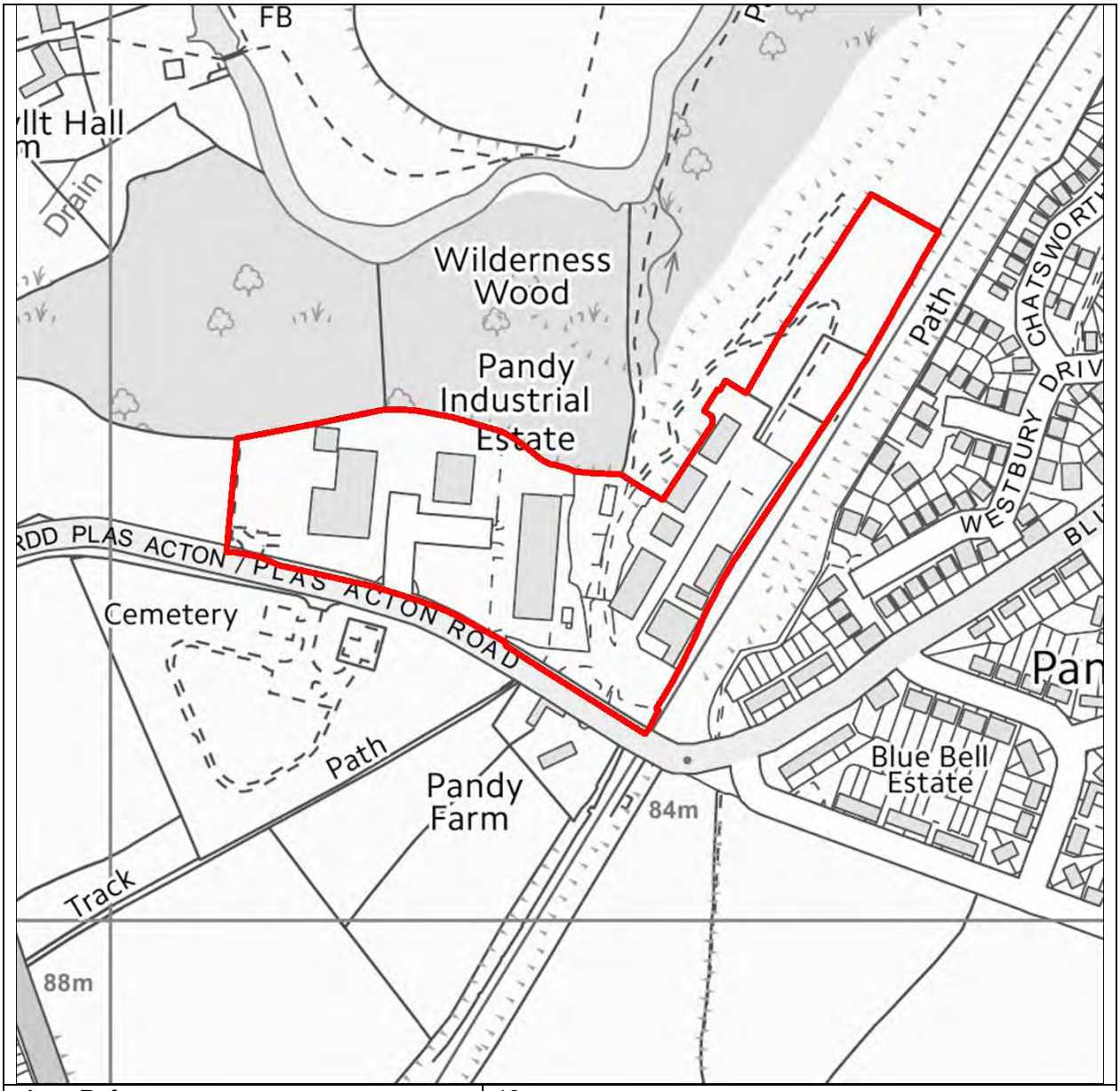
Area Reference	16
Name	Two Mile Industrial Estate, Brynteg
Description	Small but well established local industrial estate, servicing the smaller settlements of northern Wrexham. Provides some 21 small workshop units (plus one larger premises), of budget and moderate quality, accommodating a range of local businesses including motor garages and monumental masons.
Key Occupier(s)	Meirion L Jones and Sons, Hypersport, K Jones MOT and Repairs, 2 Mile Tyres, Stephen Price Memorials
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B8, Sui Generis (motor trade)
Size, ha	0.94
Building Age	1945-1990
Building Quality	Average
Constraints	Accessed via a steeply sloping entrance road. Housing surrounding
Critical Mass	Average

Opportunities for redevelopment/ expansion	No potential for expansion - surrounded by development. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Small, budget quality local employment area which has an established role in meeting micro business needs and supporting the rural economy of northern Wrexham. Two Mile Industrial Estate should be protected in the emerging LDP for B Class employment and associated trade uses.



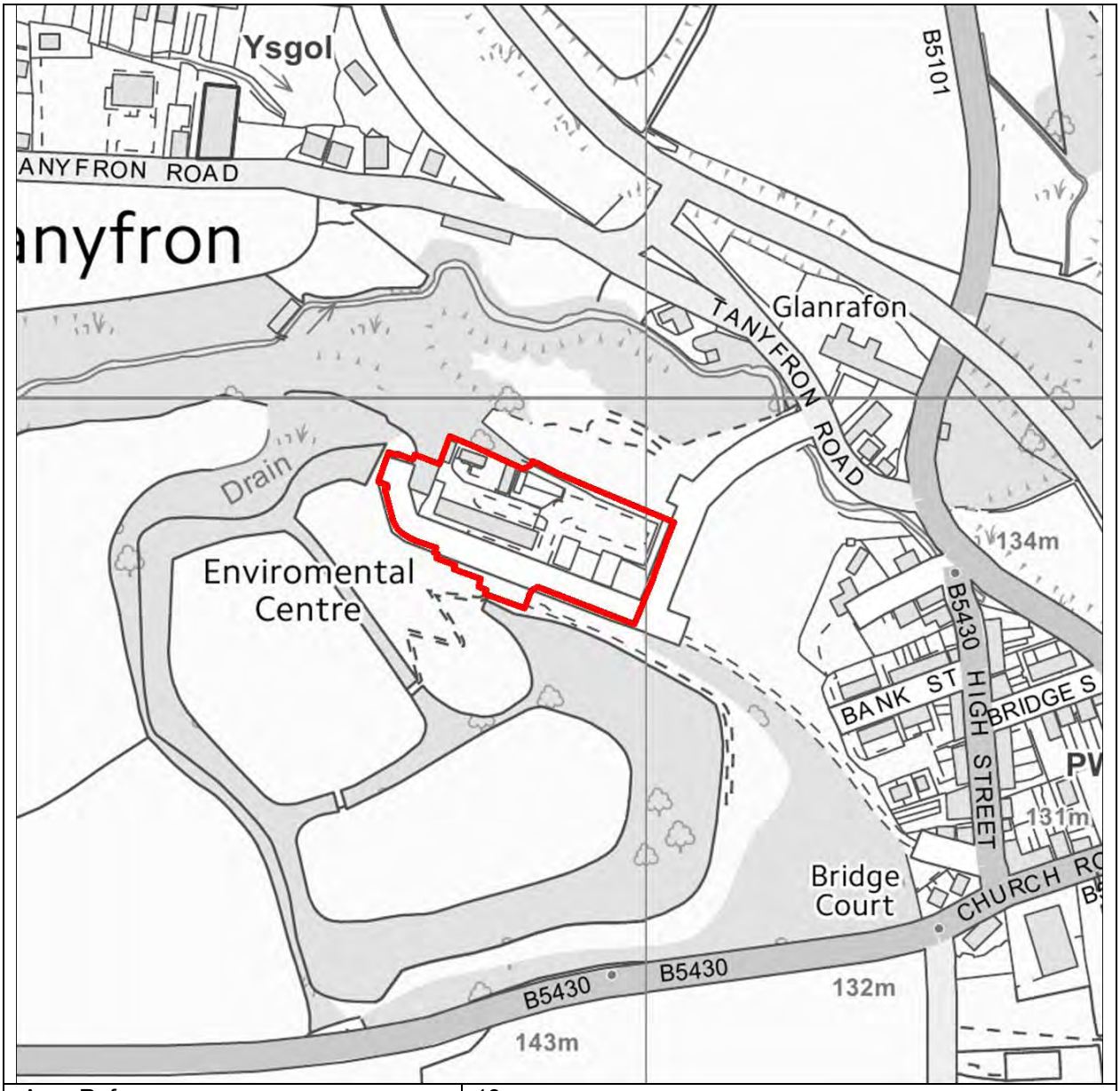
Area Reference	17
Name	Penley Industrial Estate, Penley
Description	Substantial former hospital/military facility, comprising some 39 small buildings converted to workshop uses, in a rural location in the south east of Wrexham. Scheme is of budget quality and around a third of the units are vacant, including some partially derelict units.
Key Occupier(s)	Rightsort Mailing Company, David Groom Sound, Alfa Foils
Prominence	Poor
Current Use (Use Classes)	B1 (Class III), B8, Sui Generis (motor trade)
Size, ha	4.40
Building Age	Pre-1945
Building Quality	Poor
Constraints	Bounded by Special Landscape Area (Policy EC5) Housing to the east Derelict buildings onsite.
Critical Mass	Poor

Opportunities for redevelopment/ expansion	SLA adjoins to west boundary and is grade 3 agricultural land, remainder surrounded by existing development. This employment area is significantly underused and would benefit from redevelopment. However, in order to ensure a sustainable and mixed settlement, it would be beneficial for any redevelopment to be primarily for employment development and perhaps some commercial development.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Poor **Total Grade: D** Low value rural employment area, including large areas of derelict and underused land. Whole area represents an opportunity for investment and/or redevelopment. However, as the only significant employment area in the rural south east of the County Borough, the priority should be to retain a significant element of the area for B Class employment uses. This reflects the fact that some of the east of the area has previously been redeveloped for housing.



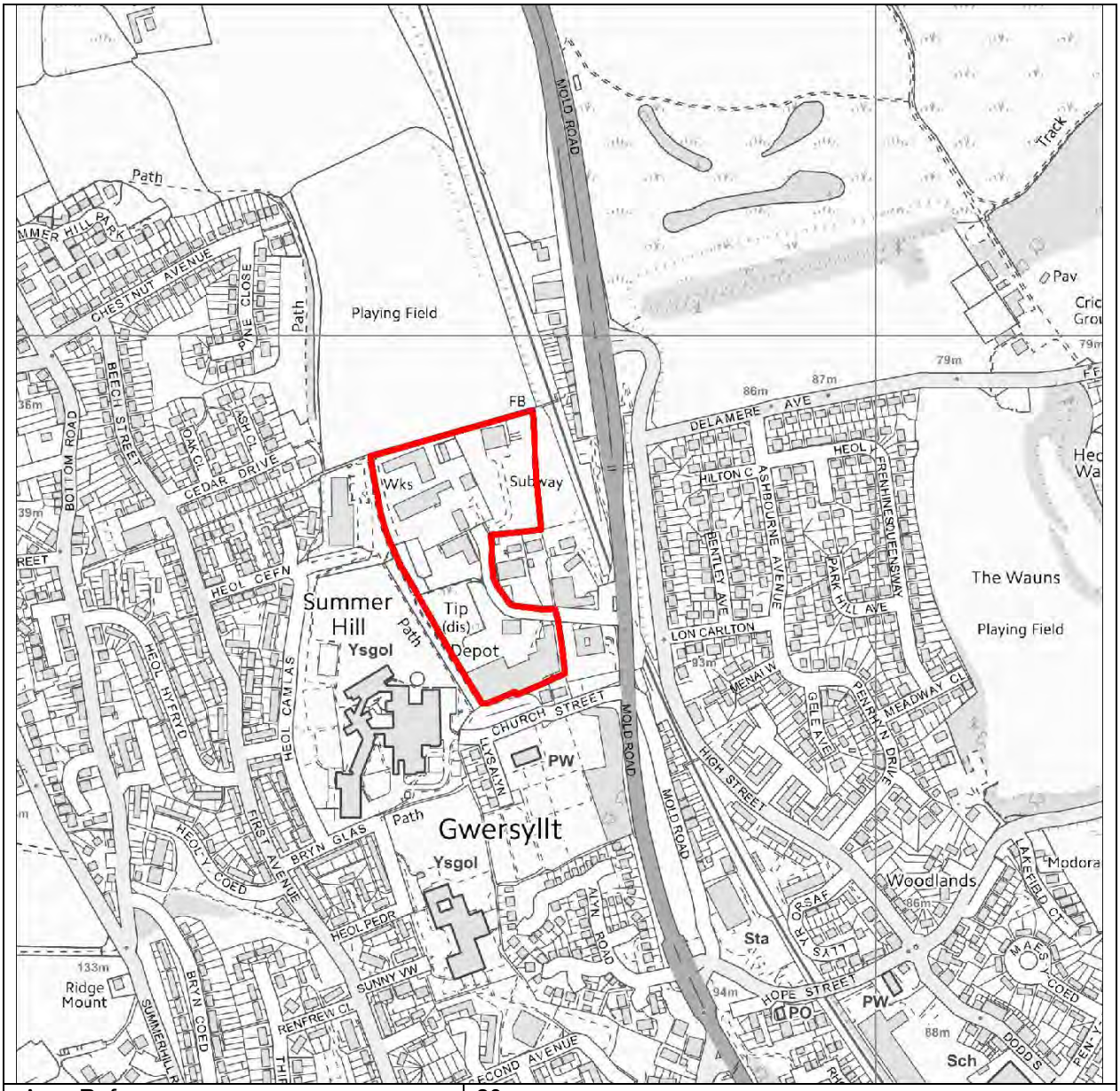
Area Reference	18
Name	Pandy Industrial Estate, Gresford, Wrexham Town
Description	Small, modern industrial estate comprising industrial and workshop premises in the front with a range of self contained offices to the rear.
Key Occupier(s)	Lloyd Morris Electricals, Grosvenor Employment Solutions, Jolly Good Van Hire
Prominence	Good
Current Use (Use Classes)	B1 (Class II and III), B8
Size, ha	4.45
Building Age	1990-2000, 2000+
Building Quality	Good
Constraints	-
Critical Mass	Average

Opportunities for redevelopment/ expansion	No potential for expansion. Woodland with TPOs and a wildlife site adjoin this employment area to the north and west boundaries, SLA adjoins to the north and Green Barrier to the west and south, a railway line adjoins to the east and a cemetery to the south. Land to the north and west is classed as grade 3 agricultural land, the south is grade 2 and the remainder is unclassified. Could be suitable for alternative uses, but it currently provides a range of small scale starter units, potentially provides local employment opportunities Also in the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses may not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Good **Total Grade: B/C** Small, modern and successful local employment area. Provides reasonable quality workshop premises to a range of local firms. Of particular value are the self contained office units to the rear. Despite their backland position, these are a relatively unique property resource in the north of Wrexham. Pandy Industrial Estate should be protected in the emerging LDP for B Class employment.



Area Reference	19
Name	Southsea Industrial Estate, Southsea
Description	Former colliery complex in an edge of settlement location, including derelict colliery buildings, with three properties refurbished to provide good quality offices.
Key Occupier(s)	Groundwork North Wales
Prominence	Poor
Current Use (Use Classes)	B1 (Class II)
Size, ha	1.82
Building Age	Pre 1945
Building Quality	Poor-Good
Constraints	Derelict buildings onsite.
Critical Mass	Poor

Opportunities for redevelopment/ expansion	Limited potential for expansion. Wildlife site surrounds industrial area. Green Barrier surrounds the whole of Southsea. Surrounded by grade 3 agricultural land. Area contains a number of listed buildings. All buildings not occupied. May be potential for alternative commercial uses. An outline application for housing on land immediately adjoining the area to south east recently expired. This is earmarked for allocation as housing in the LDP. The area immediately to the north, but within the settlement limit is being considered for its potential as housing.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C/D** Area effectively comprises rural offices for Groundwork North Wales plus several ancillary buildings. Other land remains available for development/redevelopment. The Groundwork office needs to be protected in the emerging , but the other land is potentially available to meet a range of employment and commercial needs which would be appropriate in this edge of settlement location.

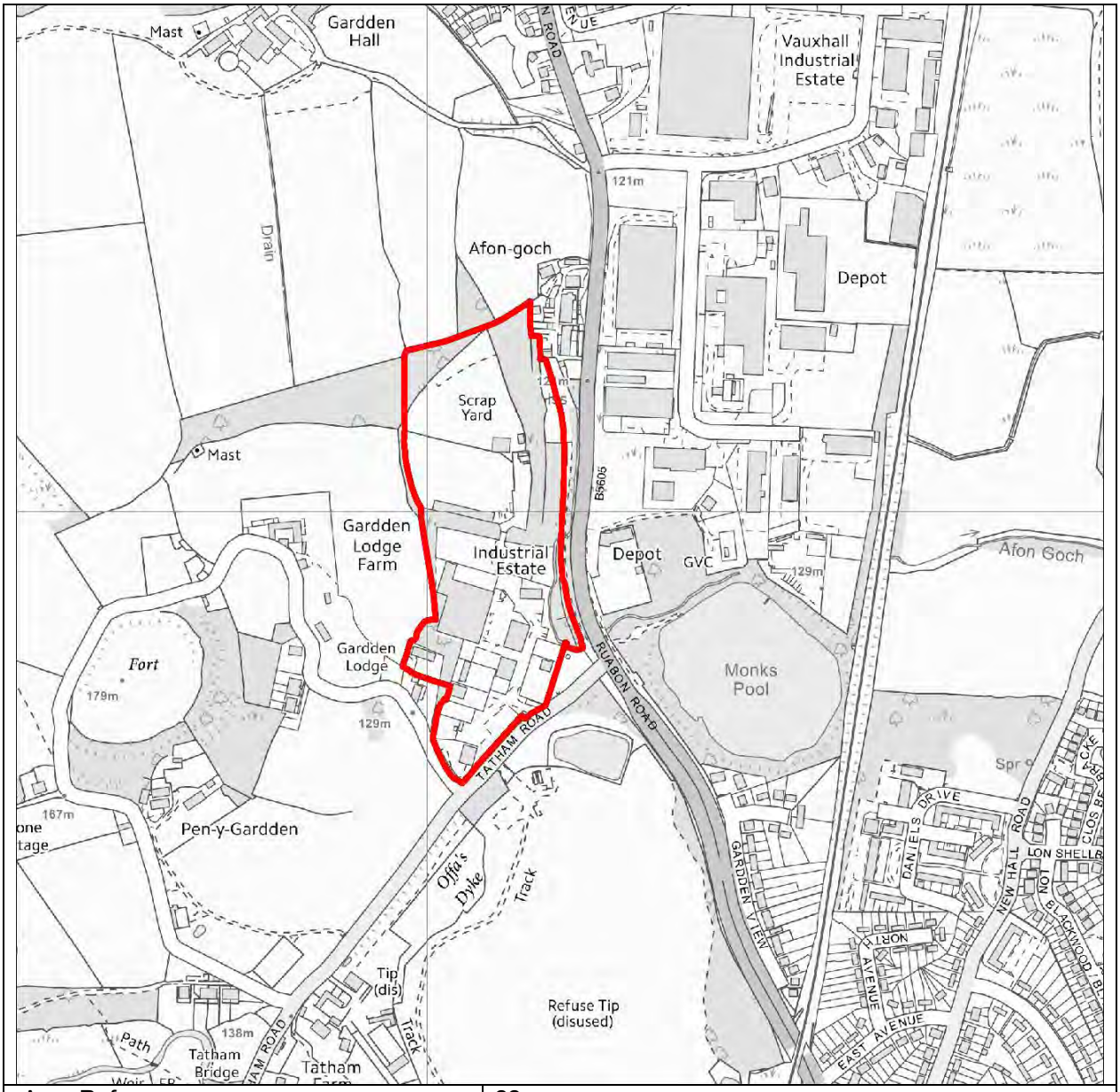


Area Reference	20
Name	Westminster Industrial Estate, Gwersyllt
Description	Backland employment area, providing a mix of moderate quality industrial premises, open storage land and some premises in trade and retail use. Area is located off a main road, to the rear of housing, retail a social club and radio studio.
Key Occupier(s)	Acorn Antiques & Collectables, Kent Supplies
Prominence	Poor
Current Use (Use Classes)	B1 (Class II), B8, A1
Size, ha	3.81
Building Age	1945-1990
Building Quality	Average
Constraints	Housing adjacent
Critical Mass	Average

Opportunities for redevelopment/ expansion	Generally surrounded by existing development, except for northern boundary which is adjoined by an area of public open space, eastern boundary is adjoined by railway line and the south western boundary is adjoined by school playing fields. Adjoining land to north classed as grade 3 agricultural land and the remainder is unclassified. Therefore limited room for expansion. The northern half of the site, which has been vacant for some time, is being considered as a potential housing site. However, this is dependent upon whether it needs to be retained for employment purposes. In the interests of sustainable development and ensuring mixed and balanced settlements, the release of this employment land to non/employment/commercial uses will need to be carefully considered.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Average Environment: Average **Total Grade: C** Even with the exclusion of the Capital FM studio, frontage retail and social club, this is still a relatively diverse employment area including other retail uses and open storage land. This needs to be reflected in emerging LDP policy.

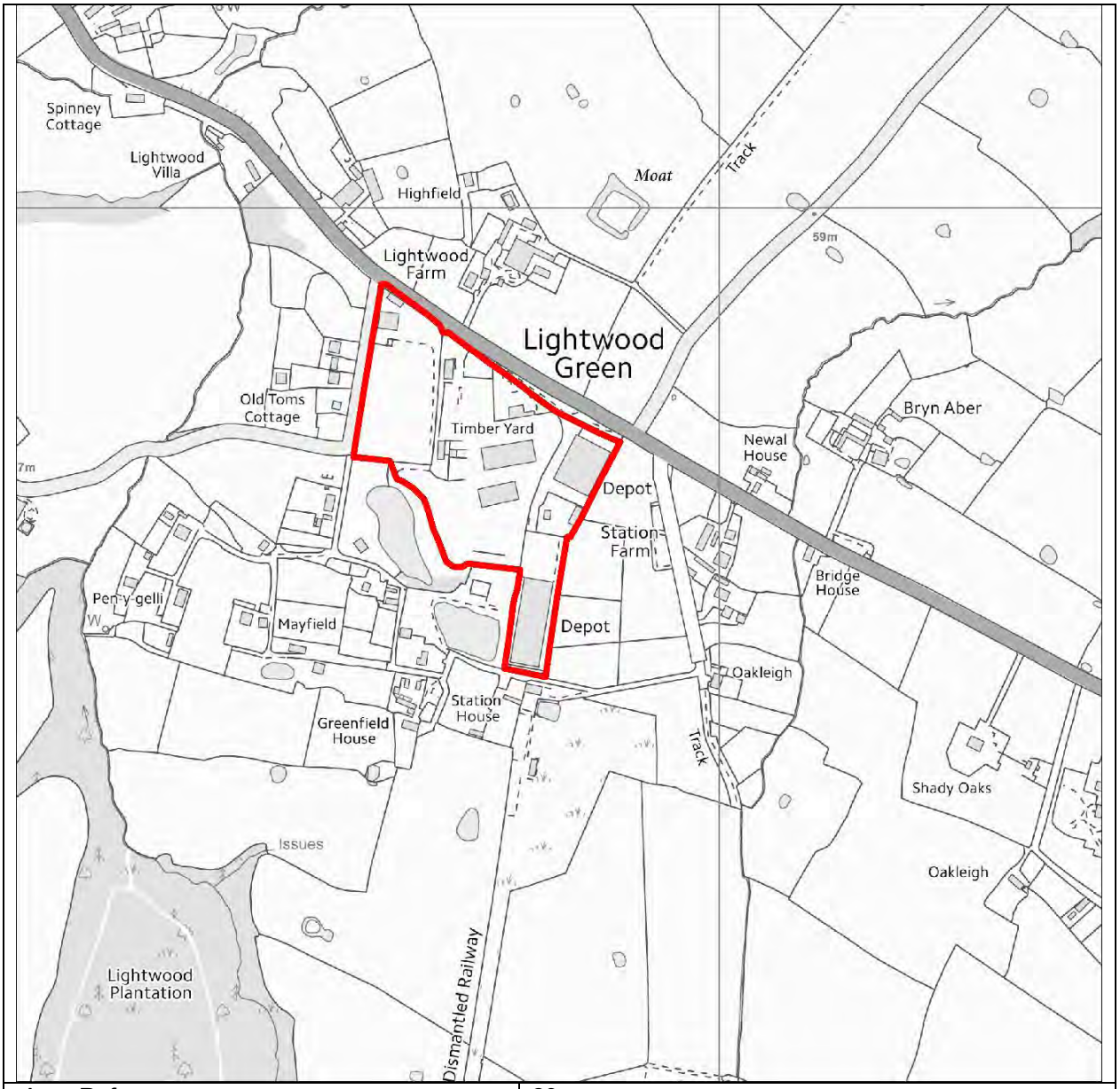
Area Reference	21
Name	Coppi Industrial Estate, Rhos
Description	Established, edge of settlement industrial estate with modern, mid-sized industrial and trade premises on the frontage and lower quality properties, including open storage land, to the rear.
Key Occupier(s)	A Plant, Barnett Engineering
Prominence	Average
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	3.94
Building Age	1945-1990, 1990-2000, 2000+
Building Quality	Average
Constraints	Bounded by Special Landscape Area (Policy EC5)
Critical Mass	Average

Opportunities for redevelopment/ expansion	SLA adjoins to the north, west and southern boundaries, farm and farm buildings adjoin to the east. Surrounding land is grade 3 agricultural land. Limited scope for expansion, unless there is an opportunity to expand into the adjoining farm complex. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses may not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Small established, industrial estate including some good quality units on the frontage. There are a range of low density backland sites to the rear, which could provide some (limited) opportunities for infill development and include one identified employment site. Future development should be for B-Class employment which, reflecting current uses in the area, may include some trade options. The whole area should be protected in the emerging LDP for B Class employment and associated trade uses.



Area Reference	22
Name	Gardden Industrial Estate, Ruabon
Description	Small, edge of settlement industrial estate, located on an edge of settlement location and separated from the larger Vauxhall Industrial Estate by the B5605 Ruabon Road. Comprises smaller, modern workshops in the south, near the entrance, and larger units and open storage sites/scrap yard sites in the north.
Key Occupier(s)	Clwyd Compounders, Clwyd Breakers
Prominence	Average
Current Use (Use Classes)	B1 (Class III), B2, B8
Size, ha	6.42
Building Age	1990-2000
Building Quality	Average
Constraints	Bounded by Green Barrier (Policy EC1) and Special Landscape (Policy EC5) areas
Critical Mass	Average

Opportunities for redevelopment/ expansion	Limited scope for expansion. Surrounded by green barrier on north, west and southern boundaries. Adjoined by SLA to far south west corner. Land on these boundaries also classed as agricultural grade 3. Residential development adjoins to far north east corner, wildlife site adjoins to the west and Vauxhall Industrial Estate adjoins to the east. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses may not be appropriate.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average **Total Grade: C** Established industrial estate providing a mix of reasonable quality B1 (Class III) workshops and larger B2 premises. Gardden Industrial Estate should be protected in the emerging LDP for B Class employment. Land to the rear accommodates some bad neighbour uses (car breakers). If the breakers vacated then it would free up land for infill development, however, at present all land is in use and the car breakers is well screened from view by trees and adjacent factories.

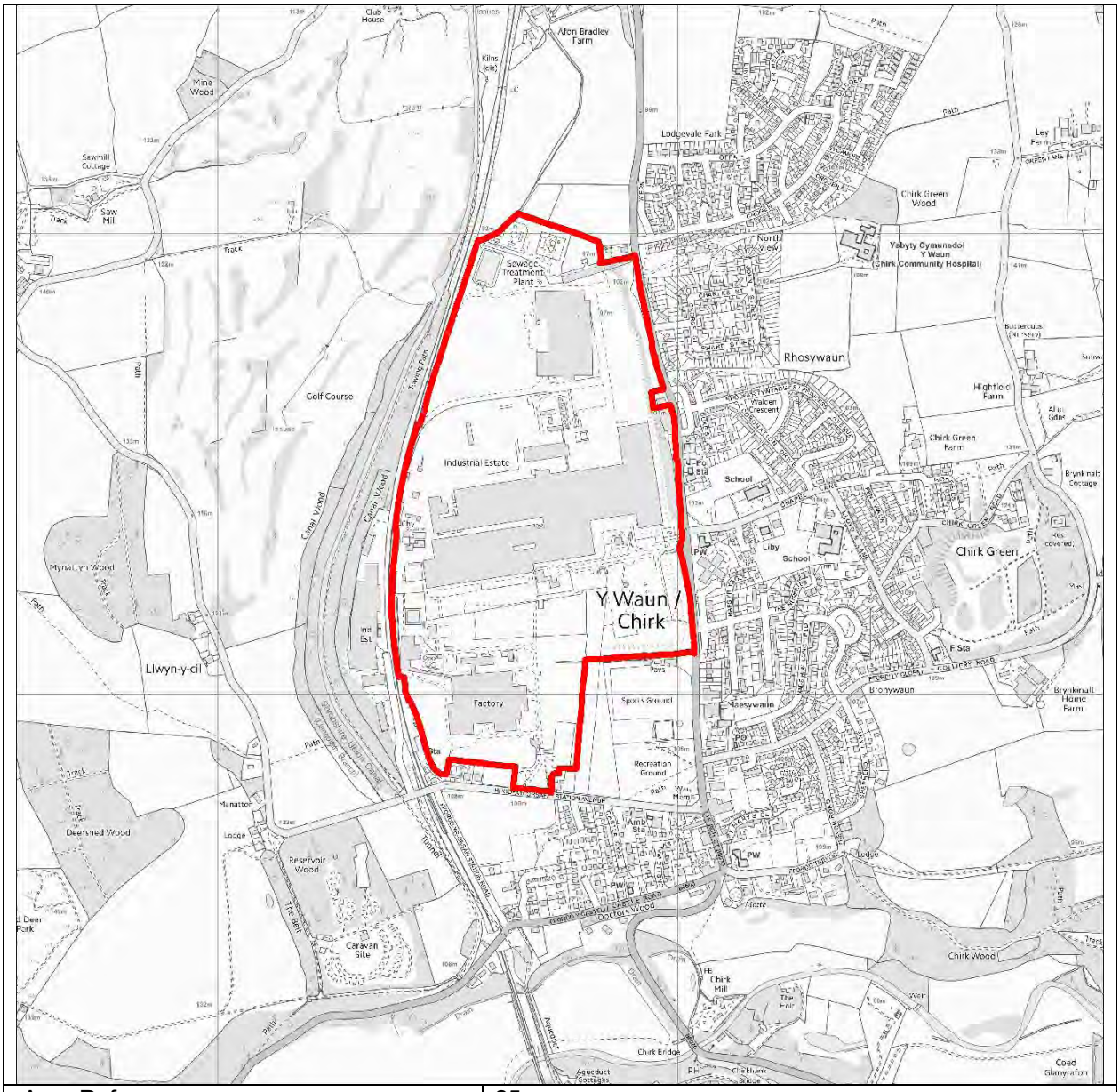


Area Reference	23
Name	Lightwood Green Industrial Estate, Overton
Description	Low density rural industrial estate, primarily comprising a number of timber and haulage yards
Key Occupier(s)	A E Evans, Timber Direct, Lloyd Bronington
Prominence	Poor
Current Use (Use Classes)	B2, B8
Size, ha	5.22
Building Age	1990-2000
Building Quality	Average
Constraints	In a Special Landscape Area (Policy EC5)
Critical Mass	Poor

Opportunities for redevelopment/ expansion	This currently lies outside any recognised settlement limits and was proposed as a protected employment area in the withdrawn LDP to ensure alternative employment opportunities in rural areas. Given its rural location, any increase in density on this site or complete redevelopment may not be appropriate. This needs to be looked into further. Lies within a SLA and is classed as grade 3 agricultural land.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: C** Established, rural employment area accommodating a group of timber and haulage companies, on low density sites with most land in use for open storage/HGV parking. However, despite the low density nature of the area, most land is in active use by a number of large employers. The area should therefore be protected for B-Class employment in the emerging LDP . If one of the employers vacates, then land may be available for infill development. However, the current low density nature of the area is more appropriate for its rural location.

Area Reference	24
Name	Llay Hall Industrial Estate and Riverside Business Park, Cefn y Bedd, Sydallt
Description	Linear employment area, extending south east from the A451 Mold Road along a series of narrow access roads, separated by areas of woodland and the River Alyn. Property in the area is generally modern and of a moderate or good quality.
Key Occupier(s)	Wrexham Storage, R C J Precision, North Wales Profiling
Prominence	Poor
Current Use (Use Classes)	B1 (Classes II and III), B2, B8
Size, ha	7.88
Building Age	1990-2000, 2000
Building Quality	Average-Good
Constraints	East of site is in a Flood Risk Area (Policy EC12) Access roads are narrow in places
Critical Mass	Average

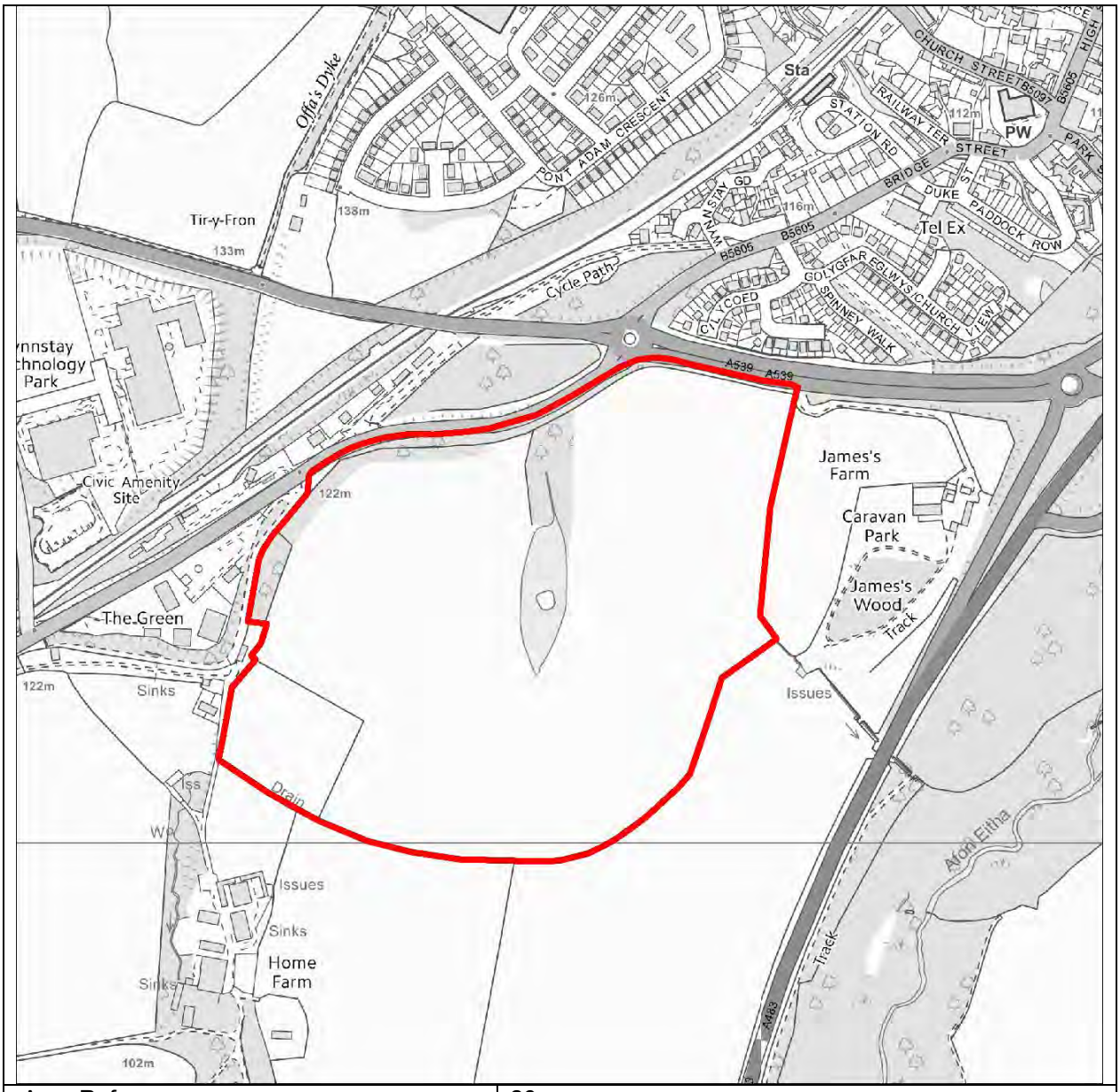
Opportunities for redevelopment/ expansion	Currently lies outside any recognised settlement limits and is close to the border with Flintshire. Proposed as protected employment area in the withdrawn LDP. Limited potential for expansion. River Alyn adjoins to the north east boundary and runs through the south east of the site. Wildlife site adjoins to the far north east boundary and a wooded area with TPOs adjoins the north east boundary. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses may not be appropriate. Part of the land immediately to the south has been submitted as a candidate site for residential development (SY01CS). Surrounding land is also grade 3 agricultural land.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C** Despite its rural location and dispersed nature, this employment area is well established and includes modern and good quality industrial premises. There is evidence of recent development and/or refurbishment of premises. Llay Hall Industrial Estate and Riverside Business Park should be protected in the emerging LDP for B Class employment.



Area Reference	25
Name	Chirk Industrial Estate, Chirk
Description	Two large manufacturing complexes for Kronospan and Cadbury, located on the edge of the Chirk settlement area and bounded by housing to the east and south
Key Occupier(s)	Kronospan and Cadbury
Prominence	High
Current Use (Use Classes)	B2
Size, ha	66.87 (This figure also includes adjacent Canal Wood Industrial Estate, Ref. 4)
Building Age	1945-90, 1990-2000, 2000+
Building Quality	Average
Constraints	Green Barrier land (Policy EC1) to the north and west Includes a sewage works
Critical Mass	Poor

Opportunities for redevelopment/ expansion	Only potential area for expansion would be directly to the north, however, this is a green barrier and SLA. It is also classed as grade 3 agricultural land. Railway line and canal adjoin to the west. Residential development adjoins to the east and south. In the interests of sustainable development and ensuring mixed and balance settlements, the release of this employment land to non employment/commercial uses would not be appropriate.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Average Prominence: Good Environment: Average **Total Grade: B** Established facilities for two of Wrexham's largest employers, which should be protected in the emerging LDP. Consideration of development options on the agricultural land to the north should take account of Kronospan's stated need for future (long term) expansion land. In discussion (see Section 7.0 of the main report) Kronospan highlighted this location as a logical extension to the current industrial operations in Chirk. If however, the northern parcel of land was not released in the future, the company have stated that its business operations would be constrained.

Other Employment Areas, Existing or with Consents



Area Reference	26
Name	Ruabon Business Park, Ruabon
Description	Large area of greenfield agricultural land and woodland at the A483/A539 junction, with permission for a B1 Business Park.
Key Occupier(s)	N/A
Prominence	Good
Current Use (Use Classes)	N/A
Size, ha	23.00
Building Age	N/A
Building Quality	N/A
Constraints	Various ecology issues – including breeding birds Footpaths cross the site Woodland onsite Pond in centre of site (to be retained in current proposal) Greenfield site bounded by Green Barrier (Policy EC1) and Special Landscape Area (Policy EC5) land. Walking/cycling route passes through the site (Policy T10)
Critical Mass	N/A

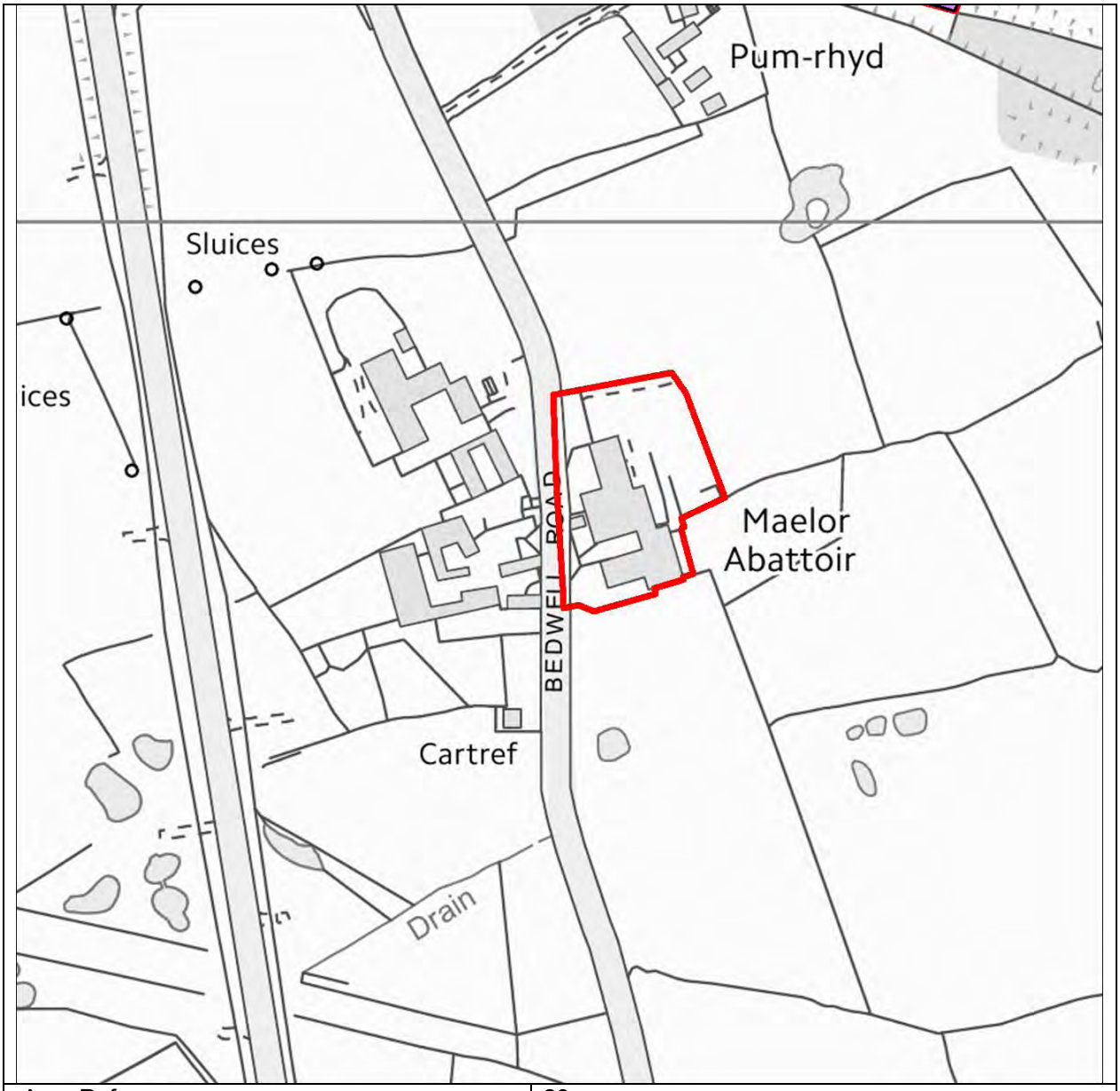
Opportunities for redevelopment/ expansion	Special Landscape Area adjoins the south, south east and south west. Green barrier adjoins directly to the north, existing development to the north west and green barrier to the east. Surrounding undeveloped land is mixture of grade 2 and 3 agricultural land. Also the land adjoining to the south and south west is on the CADW Parks and Gardens Register and is grade 1. There is therefore no opportunity to expand this area. The site currently lies outside any recognised settlement limits, but has secured permission on the back of an allocated employment site in the previously adopted Wrexham Maelor Local Plan. P/2003/1484 - Business Park B1 use Granted 6th June 2005. P/2010/0847 - Certificate of Lawful Development for B1 use (P/2003/1484) allowed on appeal 20th June 2011. Outline application (P/2014/0021) currently pending for mixed use including 3.42ha for B1, retail of 2.28ha and residential of 9.73 ha and other uses.
Other Information	Outside of a settlement area Site has reserved matters planning permission (App. Ref. P/2003/1484) for a 49,749 sqm B1 Business Park – High Technology, Manufacturing, Research and Development of Prestige Offices. Also has a Lawful Development Certificate for commencement of works.
Grading and Recommendations	Critical mass: N/A Accessibility: Good Prominence: Good Environment: Good **Total Grade: B (If successfully developed)** Land has the potential to provide a substantial new high grade employment area, on a main road location, which could serve the entirety of the County Borough and beyond. However, there remain a range of issues to be addressed including ecological/landscape issues and the scale of B-Class employment to be provided, before development can commence. Site should be protected in the emerging LDP for B Class uses, plus whatever mix of other uses is judged appropriate, at present. However, should it not prove possible to deliver a viable business park scheme here, given the above issues, then the site should be considered for alternate uses or, if no development options are appropriate and viable, retained as greenfield agricultural land.

Area Reference	27
Name	Rossett Business Village, Rossett/Lavister
Description	Small, rural business scheme, comprising a row of terraced, brick-built, modern office units on a densely developed site
Key Occupier(s)	Synergy Group, TCA Consultants, AQR, Cummings Financial Advisors
Prominence	Poor
Current Use (Use Classes)	B1 (Class II)
Size, ha	0.91
Building Age	1990-2000
Building Quality	Good
Constraints	In a Green Barrier area (Policy EC1) Dense nature of development allows for only limited parking and narrow access roads
Critical Mass	Average

Opportunities for redevelopment/ expansion	Surrounding land is grade 2 agricultural. SLA adjoins to the south east. Not listed as an employment area in the UDP or withdrawn LDP. Alternative uses would be limited to the conversion of the existing buildings.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: C** Small rural business scheme, providing reasonable quality office space to a large rural hinterland in the north and east of the County Borough. In particular it provides smaller office premises, something not readily available in nearby schemes, including Llay Industrial Estate. Scheme is well established and should be protected for B Class employment uses in the emerging LDP. However, any area of protection should be tightly defined to avoid the loss of any additional surrounding greenfield land.

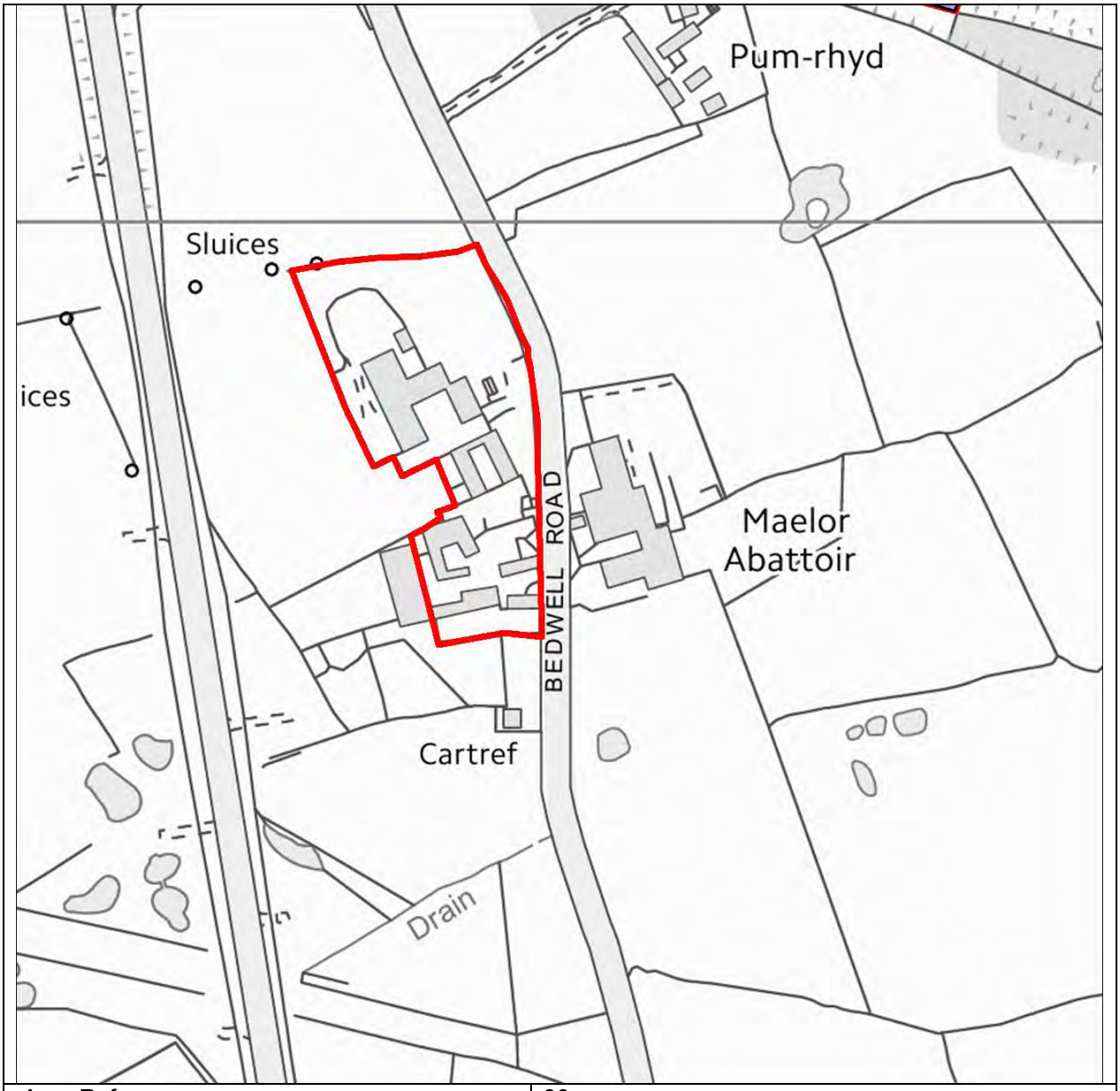
Area Reference	28
Name	Pickhill Cross Lanes, Cross Lanes
Description	Large rural dairy and creamery facility, located of the A525 close to the River Dee
Key Occupier(s)	Present occupancy unclear – previously occupied by Dairy Crest and First Milk
Prominence	Low
Current Use (Use Classes)	B2
Size, ha	8.52
Building Age	1945-1990
Building Quality	Average
Constraints	-
Critical Mass	Poor

Opportunities for redevelopment/ expansion	Outside settlement limit. Not listed as an employment area in the UDP or withdrawn LDP. Adjoined by grade 2 and grade 3 agricultural land. Within 500m SAC buffer of River Dee. River Dee adjoins site to south east. Permission granted for a replacement cheese cutting and packaging plant (P/2011/0750 on 4th December 2012). This was never implemented and the factory has since closed down.
Other Information	Outside of a settlement area
Grading and Recommendations	Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Good **Total Grade: D** Large rural dairy which appears to be partially/fully vacant at present. Assuming the area is not soon occupied by another dairy (or associated business) then it represents a large brownfield redevelopment opportunity. The rural nature of the facility means that development for alternative uses would be difficult. It is not therefore recommended that this site be protected for employment uses. Any future applications should be decided on their own individual merits.



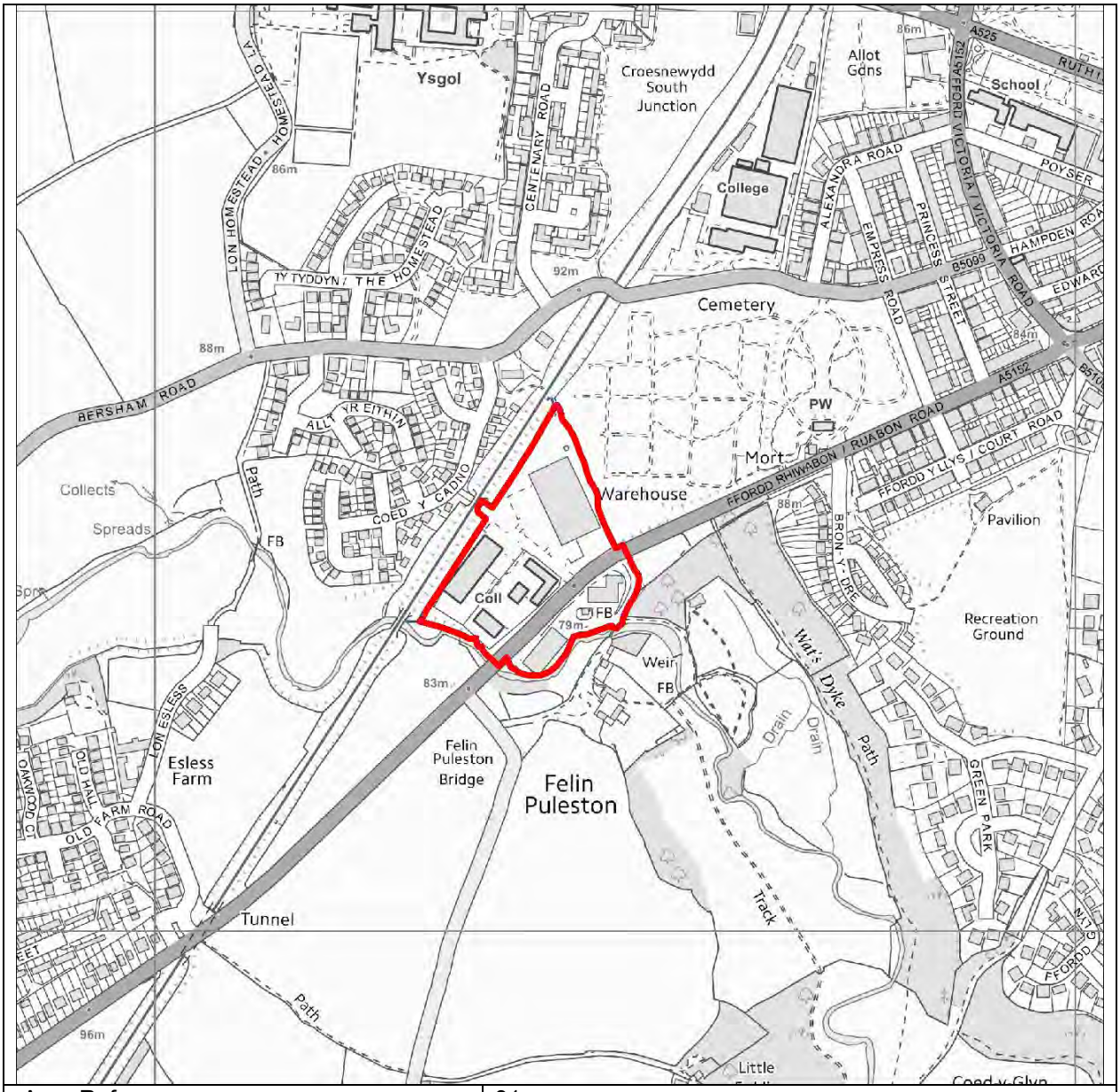
Area Reference	29
Name	Maelor Abattoir, Cross Lanes
Description	Rural abattoir facility comprising a range of brick and metal framed industrial properties, fronting Bedwell Road, some 250 metres south of Wrexham Industrial Estate
Key Occupier(s)	Fairfield Meat Company
Prominence	Average
Current Use (Use Classes)	Sui Generis
Size, ha	0.88
Building Age	1945-1990, 1990-2000
Building Quality	Average
Constraints	-
Critical Mass	Poor
Opportunities for redevelopment/ expansion	An existing business use outside existing settlement limits surrounded by grade 3 agricultural land.
Other Information	Outside of a settlement area

Grading and Recommendations	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: N/A** A small site, occupied by a solus operator that, it can be argued, forms part of the County Borough's agricultural sector rather than providing B-Class employment. Adoption of this site for B Class employment would therefore appear unnecessary. It is also recognised that adopting a site this close to Wrexham Industrial Estate, for B1/B2/B8 uses may provide some precedent for further development in the area and the extension of the Industrial Estate south towards Cross Lanes. The site should therefore remain part of the general rural economy of the County Borough, subject to any changes in occupancy and use in the premises.



Area Reference	30
Name	Clutton Agricultural, Cross Lanes
Description	Farm buildings, including some in residential use, but including facilities for the disposal of agricultural waste.
Key Occupier(s)	Clutton (Agricultural) Ltd
Prominence	Average
Current Use (Use Classes)	Sui Generis
Size, ha	1.76
Building Age	Pre 1945, 1945-1990
Building Quality	Poor
Constraints	-
Critical Mass	Poor
Opportunities for redevelopment/ expansion	An existing business use outside existing settlement limits surrounded by grade 3 agricultural land. Land directly adjoining to the north submitted as a candidate site (WIE06CS) for consideration as mixed use.
Other Information	Outside of a settlement area

Grading and Recommendations	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Good **Total Grade: N/A** As with Maelor Abattoir, this site is seen to form part of the County Borough's agricultural sector rather than providing B-Class employment. Particularly as the properties appear to form part of a larger farm complex, including residential farm buildings and other housing. Adoption of this site for B Class employment would therefore appear unnecessary. It is also recognised that adopting a site this close to Wrexham Industrial Estate, for B1/B2/B8 uses may provide some precedent for further development in the area and the extension of the Industrial Estate south towards Cross Lanes. The site should therefore remain part of the general rural economy of the County Borough, subject to any changes in occupancy and use in the premises.



Area Reference	31
Name	Pulestone Industrial Estate, Wrexham Town
Description	Small group of ten budget quality workshop units, most in motor trade related uses, in an edge of settlement location, prominently located off the A5152 Ruabon Road
Key Occupier(s)	Wrexham Tyres, Riverside Café, Autoelecs Tuning Centre, The Green Machine
Prominence	Good
Current Use (Use Classes)	B1 (Class III), A1, A3, Sui Generis (Motor Trade)
Size, ha	2.98
Building Age	1990-2000
Building Quality	Average
Constraints	South is in a Flood Risk Area (Policy EC12)
Critical Mass	

Opportunities for redevelopment/ expansion	Within but on the edge of Wrexham Town settlement limit. Cemetery adjoins to the north east, railway line and residential development adjoin to the north west, a local wildlife site adjoins to the south west, the river Clywedog also runs along the south west and south east boundary and an SLA adjoins the undeveloped boundaries in the north east, south east and south west. No potential for expansion. A number of alternative uses may be considered acceptable, however, in the interests of ensuring mixed development and sustainable communities, it may be beneficial to protect this area for employment/commercial purposes.
Other Information	Within a settlement area
Grading and Recommendations	Critical mass: Average Accessibility: Good Prominence: Good Environment: Average **Total Grade: C/D** While not of particularly high economic value, Pulestone Industrial Estate does represent an active, prominent and established employment area within the Wrexham Town settlement boundary. However, it should also be recognised that most premises is in trade and motor repair/trade uses, with some premises in partial retail use and a café onsite. Protection as a primarily B Class employment area is therefore not appropriate and the area should perhaps remain as a relatively informal mixed use employment location in Wrexham.

Wrexham
Business Survey 2014

Company Name	
Contact Name	
Position	
Address	
Email Address	
Tel No	
Business Activity e.g. manufacturing	

Employees/Hours of Operation

1. Number of: **full-time** employees _____ and/or **part-time** employees _____

2. What are your current hours of operation and are there any issues relating to out of hours operations?_____

_____

Current Accommodation

3. Type of accommodation (please tick main type/use):

Office	☐	Serviced office	☐	High-tech/lab	☐
Industrial	☐	Warehouse	☐	Barn conversion/Farm location	☐
Homeworker	☐				

4. Current Location:

Town centre	☐	Industrial estate	☐	Home	☐
Technology/Business park	☐	Rural	☐		

5. Is the property:

Owned ☐ Rented ☐

6. Size of unit:

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

If larger than 5000 sqm, please specify floorspace _____

Site size, hectares/acres _____

7. How satisfied are you with your current accommodation?

Very satisfied	☐	Satisfied	☐	Unsatisfied	☐	Very unsatisfied	☐

8. If you are unsatisfied or very unsatisfied, please state your reasons.

_____

_____

9a. Do you require superfast broadband for your business needs? Yes ☐ No ☐

9b. If Yes, is it currently available to your premises? Yes ☐ No ☐

Future Accommodation

10. Are you considering moving premises within the next:

12 months? Yes ☐ No ☐ *2-5 years*? Yes ☐ No ☐

If yes to either of the above, please respond to questions 11a – 11i, otherwise go directly to question 12.

11a. What type of accommodation will you be looking for? (please tick main type/use):

Office	☐	Industrial	☐	Serviced office	☐
Warehouse	☐	High-tech/Lab	☐	Land	☐

Other (please specify): _____

11b. Tenure required?

Freehold	☐	Leasehold	☐	No Preference	☐

11c. Quality of premises preferred?

Prestigious/ New	☐	Moderate	☐	Basic/Budget	☐	No Preference	☐

11d. Will this be **additional** ☐ or **alternative** ☐ to existing property?

11e. What size of unit/site will you be looking for?

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

If larger than 5,000 sqm, please specify floorspace _____

Site size, hectares/acres _____

11f. General location – please indicate preferred areas(s) below (continued on page 3):

Wrexham County Borough

Wrexham Town (e.g. Wrexham Technology Park, Town Centre)	☐	Wrexham Industrial Estate	☐	Llay Industrial Estate	☐
South East, Maelor Area (e.g. Penley Industrial Estate, Lightwood Green Industrial Estate)	☐	South West Wrexham (e.g. Croesfoel Industrial Estate)	☐	North West Wrexham (e.g. Westminster Industrial Estate)	☐
East Wrexham (e.g. Rossett Business Village)	☐				

Elsewhere in Wrexham County Borough (please specify): _____

Other Locations

Flintshire	☐	Elsewhere in North Wales	☐	Elsewhere in Wales	☐
Chester	☐	Ellesmere Port/ Neston	☐	Elsewhere in Cheshire	☐
Oswestry	☐	Elsewhere in Shropshire	☐		
Liverpool	☐	Manchester	☐		

Other locations (please specify):_____

11g. Location type preferred:

Town centre	☐	Industrial estate	☐
Technology/Business park	☐	Rural	☐

11h. What do you consider to be the most important factor when seeking alternative accommodation? Please state below.

_____

_____

_____

11i. Will the move result in additional jobs being created?

Yes ☐ No ☐ If yes, how many? _____

Additional Comments

12. If you have any additional comments affecting your choice of premises please use the space below (please continue on another page if necessary).

Topics might include:

- Road Infrastructure
- Business support
- Planning issues (including ecological issues)
- Public transport
- Funding availability
- Staff availability
- Property availability

_____

_____

_____

_____

Please indicate if you are happy to be contacted for further research YES / NO

Please return the questionnaire by the 21st March 2014 using our pre-paid reply envelope or fax to 01925 822113.
You can also complete the questionnaire by visiting: www.bepropertygroup.co.uk/latest-news and navigate to the Wrexham/Flintshire Business Survey article.
Thank You for Your Assistance

Flintshire
Business Survey 2014

Company Name	
Contact Name	
Position	
Address	
Email Address	
Tel No	
Business Activity e.g. manufacturing	

Employees/Hours of Operation

1. Number of: **full-time** employees _____ and/or **part-time** employees _____

2. What are your current hours of operation and are there any issues relating to out of hours operations?_____

_____

Current Accommodation

3. Type of accommodation (please tick main type/use):

Office	☐	Serviced office	☐	High-tech/lab	☐
Industrial	☐	Warehouse	☐	Barn conversion/Farm location	☐
Homeworker	☐				

4. Current Location:

Town centre	☐	Industrial estate	☐	Home	☐
Technology/business park	☐	Rural	☐		

5. Is the property:

Owned	☐	Rented	☐

6. Size of unit:

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

If larger than 5000 sqm, please specify floorspace _____

Site size, hectares/acres _____

7. How satisfied are you with your current accommodation?

Very satisfied	☐	Satisfied	☐	Unsatisfied	☐	Very unsatisfied	☐

8. Please state the reasons for your answer to question 7:

_____

_____

9a. Do you require superfast broadband for your business needs? Yes ☐ No ☐

9b. If Yes, is it currently available to your premises? Yes ☐ No ☐

10. Do you have expansion land or premises on your existing site? Yes ☐ No ☐

Future Accommodation

11. Are you considering moving premises within the next:

12 months? Yes ☐ No ☐ *2-5 years*? Yes ☐ No ☐

If yes to either of the above, please respond to questions 12a – 12i, otherwise go directly to question 13.

12a. What type of accommodation will you be looking for? (please tick main type/use):

Office	☐	Industrial	☐	Serviced office	☐
Warehouse	☐	High-tech/Lab	☐	Land	☐

Other: (please specify) _____

12b. Tenure required?

Freehold	☐	Leasehold	☐	No Preference	☐

12c. Quality of premises preferred?

Prestigious/ High Quality	☐	Moderate	☐	Basic/Budget	☐	No Preference	☐

12d. Will this be **additional** ☐ or **alternative** ☐ to existing property?

12e. What size of unit/site will you be looking for?

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

If larger than 5,000 sqm, please specify floorspace _____

Site size, hectares/acres _____

12f. General location – please indicate preferred areas(s) below (continued on page 3):

Flintshire

Deeside Industrial Park	☐	Connah's Quay/ Queensferry	☐	Mold	☐
Flint	☐	Buckley	☐	Chester Boundary (Saltney, Sealand Industrial Estate, Sandycroft)	☐
Flint Coast (e.g. Mostyn)	☐	Elsewhere in Flintshire	☐	Anywhere in Flintshire	☐

Other Locations

Wrexham	☐	Elsewhere in North Wales	☐	Elsewhere in Wales	☐
Chester	☐	Ellesmere Port/ Neston	☐	Warrington	☐
Elsewhere in Cheshire	☐	Oswestry	☐	Elsewhere in Shropshire	☐
Liverpool	☐	Manchester	☐		

Other locations (please specify):_____

12g. Location type preferred:

Town centre	☐	Industrial estate	☐
Technology/business park	☐	Rural	☐

12h. What do you consider to be the most important factor when seeking alternative accommodation? Please state below.

_____

_____

_____

12i. Will the move result in additional jobs being created?

Yes ☐ No ☐ If yes, how many? _____

Additional Comments

13. If you have any additional comments affecting your choice of premises please use the space below (please continue on another page if necessary).
Topics might include:

- Road Infrastructure
- Public transport
- Staff availability
- Business support
- Funding availability
- Property availability
- Planning issues (including ecological issues)

_____

_____

_____

Please indicate if you are happy to be contacted for further research YES / NO

Please return the questionnaire by the 21st March 2014 using our pre-paid reply envelope or fax to 01925 822113.
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Thank You for Your Assistance

Appendix 13 – Developer Marketing Standards

Where a sites' or premises' owner is applying to a Local Authority for change of use from employment to an alternative use, they have to prove there is a lack of demand for that site or premises.

This table itemises the various marketing tools that should typically be used to market the interest.

Should these tools fail to identify potential purchasers or occupiers then it may be considered that there is a lack of employment demand for the site or premises in question.

Marketing Tool	Premises	Site, 0-2 ha	Site, 2+ ha
On-site Marketing Board in prominent position	✓	✓	✓
Local Property Agent	✓	✓	✓
North Wales (and Cheshire)/Welsh National Property Agent (joint or sole)	✓		✓
Liaise with Wrexham/Flintshire Councils	✓	✓	✓
Produce Marketing Particulars (in hard copy/PDF)	✓	✓	✓
Targeted mailing to Local/North Wales (and Cheshire)/Welsh National Property Agents (Internet)	✓	✓	✓
Targeted mailing to Local/North Wales (and Cheshire)/Welsh National Property Agents Property Developers/Investors (Internet)	✓	✓	✓
Targeted mailing to UK Property Agents/Developer/Investors (Internet/postal)			✓
Targeted mailing to selected potential occupiers (large local companies) (Postal)	✓	✓	✓
Advertise in Local/North Wales (and Cheshire)/Welsh National Property Agents Business Press		✓	✓

Marketing Tool	Premises	Site, 0-2 ha	Site, 2+ ha
Advertise in UK Property Press			✓
Website	✓	✓	✓
Internet Mailing to Targeted Business Sectors (e-shot type mailing)	✓	✓	✓
Marketing Period, months	6-12	6-12	9-18

Source: BE Group, 2014

Appendix 14 – Employment Sites Summary and Recommendations

The below tables provide a summary of all the sites included in the supply analyses for both Wrexham and Flintshire, indicating whether they are truly available for B1, B2, B8 development and providing recommendations as to whether they should be allocated for B-Class employment purposes in the emerging LDPs of the two local authorities.

It should be noted that these are recommendations only and ultimate decisions to allocate (or not) sites will be made by the relevant Local Planning Authority.

Table A14.1 – Employment Land Supply Summary – Wrexham

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
Wrexham Industrial Estate – Sites Allocated under UDP Policy E1							
E1.2	Abenbury Way	1.70	53	24	**Available** Owner currently seeking outline planning permission (App. Ref. P/2014/0195) for a 4,650 sqm B2 industrial unit, service yard, access and car park on 1.20 ha of land. Likely that unit will be used for the expansion of a local business (Cytec)	Yes Unless developed prior to LDP completion	1.7
E1.4	Ash Road South (ii)	7.30	50	28	**Partly Available** Recently acquired by The Village Bakery Group for further expansion within Wrexham Industrial Estate. Up to half of the site may be required as ecological mitigation, reducing the net developable area to 3.65 ha.	Yes in part. Unless developed prior to LDP completion	3.65
E1.6	Bryn Cottages	3.60	33	15	**Not available** Suggested by Council ecologists as a possible ecological refuge/mitigation site	No Assume it will be ecological mitigation	0
E1.7	Bryn Road	3.65	62	20	**Not available** Under development for a biological treatment facility Other land set aside for ecological mitigation	No Under development / ecological mitigation	0
E1.8	Clywedog Road North	1.90	45	21	**Not available** Owner has aspirations to develop this land for services Ecological issues may also make development difficult.	No Owner has service use aspirations/ ecological issues	0
E1.9	Clywedog Road East, Wrexham Industrial Estate	2.20	41	21	**Not available** Owner has aspirations to develop this land for services Ecological issues may also make development difficult.	No Owner has service use aspirations/ ecological	0

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
						issues	
E1.10	Clywedog Road South (i)	1.21	61	20	**Available** Planning permission industrial units on part Land in the west to be retained for ecological mitigation, including provision of a pond.	Yes Unless developed prior to LDP completion	1.21
E1.11	Clywedog Road South (ii)	a) 0.48 b) 0.48 c) 1 1.96 total	51	20	**Available** b) Outline planning permission for five units	Yes Unless developed prior to LDP completion	1.96
E1.12	Clywedog Road South (iii)	6.50	52	22	**Available** Owner has aspirations for a development of light industrial units here	Yes Unless developed prior to LDP completion	6.5
E1.13	Coed Aben Road	0.17	46	16	**Available** Marketed as a design and build opportunity, capable of providing a unit of 929 sqm or more.	Yes Unless developed prior to LDP completion	0.17
E1.14	Dunster Road	0.80	52	19	**Not available** Land will largely be held for the exclusive use of Lloyds Animal Foods Western.	No Expansion land only	0
E1.15	Former Tetra Pak	2.90	43	23	**Not available** Contains Greater Crested Newt ponds which are likely to inhibit development. Council Ecologists would wish to see this land retained as an ecological mitigation site	No Not Serviced	0
E1.17	Redwither (ii)	0.90	47	19	**Available** Isringhausen seeking to dispose of this site	Yes	0.9
E1.19	Redwither (iv)	0.90	47	19	**Partly Available** Isringhausen seeking to dispose of this site Potentially up to half the land (0.45 ha) could be set aside as a wildlife corridor.	Yes In part	0.45
E1.20	Redwither (v),	a) 2.03 b) 0.82 Total 2.85 ha	60	28	**Partly Available** b) Under development for 12 B1 office units	Yes	2.85
E1.21	Ridley Wood Road,	3.30	47	22	**Available** Welsh Government holding the land for the expansion of Cytec and has (or will shortly be)	Yes Unless developed prior to LDP	3.3

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
					taking it off the market	completion	
Sub Total		***41.84***					
						Net Total	**22.69**
Wrexham Industrial Estate – UDP Policy E3 Single User Site							
E3	UDP Single User Site	32.20	55	29	**Available** Northern Section (Site (a)): Has outline permission for a 46,950 sqm B8 storage and distribution unit Southern Section (Site (a)): Has outline permission for a 37,160 sqm B2/B8 development Site is also being considered as a site for the Wrexham Energy Centre	Yes Unless developed prior to LDP completion	32.2
Sub Total		***32.20***					
						Net Total	**32.2**
Wrexham Industrial Estate – Other Development Land within the Employment Area Boundary							
Site A	Abenbury Way (ii), JCB Expansion Land	6.00	47	24	**Not available** Expansion land for JCB	No Expansion land only	0
Site B	Cefn Park, Redwither Road	11.50	42	25	**Not available** A wide range of ecological constraints render the site undevelopable	No Assume it will be ecological mitigation	0
Site C	Coed Aben Road (ii & iii)	1.70	28	19	**Partly Available** On the market, for sale, as development or storage plots of 0.40 ha or more. Council Ecologist view is that the central area of the site (some 0.55 ha) should be retained, for ecology,	Yes In part	1.15
Site F	Redwither Road(ii)	0.74	39	19	**Not available** Held for the expansion of Nutrafeed	No Expansion land only	0
Site G	Site G Redwither Road(i)	0.99	66	28	**Not available** Land could not be developed without the loss of much of the established woodland and the likely interference with the wildlife corridor. The Council Ecologist view is that this site would make an ideal ecological reserve area.	No Assume it will be ecological mitigation	0
Site Hi	Bridge Road (Firestone Site)	26.00	48	28	**Not available** Has consent for, and is under development for, a prison.	No Under development for prison	0
Site Hii	Bridge	20.10	66	28	**Not available**	No	0

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
	Road (Firestone Site)				The bulk of this site will be retained to provide ecological mitigation associated with the adjacent prison	Assume it will be ecological mitigation	
Sub Total		***67.03***					
						Net Total	***1.15***
***Land Elsewhere in Wrexham* — Sites Allocated under UDP Policy E1**							
E1.22	Wynnstay Industrial Estate, Acrefair	1.40	62	33	**Available** Remaining development plot at Wynnstay Technology Park	Yes	1.4
E1.23	Gresford Industrial Estate, Pandy	1.10	62	42	**Available**	Yes	1.1
E1.24	Vauxhall Industrial Estate, Johnstown	0.71	36	18	**Not available** Three sites, all of which appear to be being held by, or developed for the use of, adjacent occupiers.	No Expansion land only	0
E1.25	Llay Industrial Estate	3.30	51	27	**Not available** North Wales Police intend to build a new custody suite and offices here – Use Class C2A Secure Residential Institution	No To be developed for Class C2A Secure Residential Institution	0
E1.26	Llay Industrial Estate	2.90	51	27	**Not available** North Wales Police intend to build a new custody suite and offices here – Use Class C2A Secure Residential Institution	No To be developed for Class C2A Secure Residential Institution	0
E1.28	Llay Industrial Estate	1.40	41	25	**Not available** Site is bounded by other ownerships and may be inaccessible.	No Constrained	0
E1.29	Llay Industrial Estate	1.20	43	21	**Not available** Held as a long term asset by a national construction firm	No Expansion land only	0
E1.30	Llay Industrial Estate	0.47	52	20	**Not available** Site is (effectively) developed to the level required by the owner.	No Developed	0
E1.31	Llay Industrial Estate	6.40	40	24	**Not available** Access constraints and multiple ownerships would make it difficult to deliver a single coherent development here. But further appraisal needed before a definitive answer can be given as to	No Constrained (subject to further appraisal)	0

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
					viability/deliverability.		
E1.32	Coppi Industrial Estate, Rhos	0.40	49	19	**Not available** Remaining land In use for open storage	No In use	0
E1.35	Pandy Industrial Estate, Pandy	0.70	57	27	**Available** Full Planning Permission for 2 industrial units totalling 855 sqm on 0.085 ha	Yes Unless developed prior to LDP completion	0.7
E1.37	Rhosddu Industrial Estate, Wrexham town	0.90	51	24	**Not available** Likely to be held as expansion land for Toolpak.	No Expansion land only	0
E1.39	Ruthin Road Developme nt Area (Western Gateway), Wrexham town	8.80	83	50	**Available** Development expected in the short/medium term	Yes Unless developed prior to LDP completion	8.8
Sub Total		***29.68***					
						Net Total	**12**
Land Elsewhere in Wrexham – Other Development Land							
Site K	Llay Industrial Estate (H)	0.80	52	20	**Not available** Site in active use for lorry parking by P. R. Pugh Haulage Contractors	No In use	0
Site L	Former Brymbo Steelworks	8.00	49	28	**Available** Although the owner has retained a long term commitment to this site, they have also continued to defer the B1/B2/B8 development in favour of residential options.	Yes Subject to further commitment s from owner that development will be delivered.	8
Site M	Ruabon Business Park, Adjacent A483	23.00	77	47	**Partly Available** The latest planning application for Ruabon Business Park would, if approved, see 85 percent of this site developed for non B-class uses	Yes In part	3.42
Site N	Buildings 5&6, Plas Power Colliery, Southsea	0.31	37	20	**Available**	Yes Not Serviced	0.31
Site O	Westminst er Industrial Estate,	0.82	55	24	**Not available** Likely to held as expansion land for D P Williams	No Expansion land only	0

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
	Gwersyllt				Holdings.		
Site P	Land at Minera Building Supplies, Five Crosses Industrial Estate, Minera	0.28	57	19	**Available** Proposed for three buildings containing 11 two-storey Class B1/B2/B8 office and workshop units	Yes Unless developed prior to LDP completion	0.28
Site Q	North of Tomlinson's Dairies, Pen y Palamant Farm, Minera	0.95	60	22	**Not available** Likely to held as expansion land for Tomlinson's Dairies.	No Expansion land only	0
Sub Total		**34.16**					
						Net Total	**12.01**
Grand Total		**204.91**				**Grand Net Total**	**80.05**

Source: BE Group, 2014

Table A14.2 – Employment Land Supply Summary – Flintshire

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
EM1.1	Chester Aerospace Park, Broughton	9.00	70	31	**Available** Planning consent for up to 42,000 sqm of B1/B2/B8 accommodation. Identified by Airbus as a preferred site for provision of a supplier park. Site divided into six development plots of which three remain available. These range from 1,858 sqm up to 13,935 sqm. Pochin report that they have a number of parties potentially interested in these plots.	Yes Unless developed prior to LDP completion	9.00
EM1.2	Manor Lane/ Hawarden Park Extension, Broughton	18.20	59	36	**Available** Outline consent for extension to existing business park for employment purposes) providing a 7,800 sqm office park and 22,100 sqm of B2/B8	Yes Unless developed prior to LDP completion	18.20

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
					development. Identified by Airbus as a preferred site for provision of a supplier park. Marketed as expansion site for Hawarden Business Park.		
EM1.3	Mount Pleasant Road (north), Buckley	2.00	70	25	**Not available** Site (largely) developed for industrial premises.	No Developed	0
EM1.4	Land North of Buckley Station, Buckley	0.60	62	35	**Not available** Held as expansion land for Buckley Foods	No Expansion land only	0
EM1.5	Drury New Road, Buckley	1.40	69	34	**Available** It is possible that Glen Dimplex, adjacent occupier, will wish to develop the additional land for further facilities. Both sites share common access arrangements at present, but could be divided to provide separate development opportunities	Yes Unless developed prior to LDP completion	1.40
EM1.7	Former Power Station, Connah's Quay	12.80	54	36	**Not available** Land to the rear of the existing power station and could not be developed separately from this facility	No Expansion land only	0
EM1.8	Crumps Yard, Dock Road, Connah's Quay	3.45	38	17	**Available** Confidential proposal on site	Yes Unless developed prior to LDP completion	3.45
EM1.10	Land to North of Shotton Paper, Deeside	24.00	62	35	**Not available** Held as expansion land for UPM Shotton	No Expansion land only	0
EM1.11	Land East of Shotton Paper, Deeside	32.00	59	28	**Partly Available** Northern site identified for a Deeside Energy Recovery Facility (energy from waste) 22.63 ha in the south of this 32 ha site has now been developed for a convertor station.	Yes In part	22.63
EM1.12	Land to North West of Garden City,	98.00	74	39	**Partly Available** Outline permission for a major mixed use development	Yes In part	98.00

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
	Deeside						
EM1.13	Greenfield Business Park, Phase I, Greenfield	1.30	42	19	**Not available** To the rear of Westbridge Furniture, and likely to be expansion land for this business	No Expansion land only	0
EM1.14	Greenfield Business Park, Phase II, Greenfield	1.20	42	15	**Partly Available** Comprises three sites: • The north-easterly site comprises contaminated brownfield land which is available. • The central site in use for lorry parking and open storage • The southern site is developed as 'Energi Centre' (training, education, research and development centre) for Kingspan and associated facilities (and is excluded from the land supply total)	Yes In part	1.20
EM1.15	Greenfield Business Park, Phase III, Greenfield	4.40	46	27	**Available**	Yes	4.40
EM1.16	Greenfield Business Park (III) Extension, Greenfield	6.60	38	20	**Available**	Yes	6.60
EM1.17	Broncoed Industrial Estate, Mold	0.70	68	23	**Not available** Site has consent for 96 dwellings and is cleared and ready for development.	No Housing development	0
EM1.18	Mold Business Park, Mold	5.30	49	24	**Partly Available** 1.40 ha in western site developed as premises for Atmos Consulting, reducing site size to 3.90 ha. Eastern site on the market with outline planning permission	Yes In part	3.90
EM1.19	Adjacent Mostyn Docks, Mostyn	3.00	52	28	**Available** Warwick International is currently seeking full planning permission for a 3,830 sqm combined heat and power plant on 1.32 ha of land in the north	Yes Unless developed prior to LDP completion	3.00

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
					of the site.		
EM1.21	Chester Road East, Queensferry	3.50	65	30	**Available** On the market for motor trade, leisure, office and industrial uses	Yes Unless developed prior to LDP completion	3.50
EM1.22	Antelope Industrial Estate, Rhydymwyn	1.10	58	31	**Available** Held to meet the expansion needs of existing businesses within Antelope Industrial Estate However, owners would also be willing to make the site available to an incoming business as a design and build option	Yes Unless developed prior to LDP completion	1.10
EM1.23	River Lane, Saltney	1.10	52	24	**Available** Eastern site developed as Riverside Trade Park comprising six units (and excluded from the land supply total) Western site remains undeveloped, partly in use for open storage	Yes	1.10
EM1.24	Land East of Saltney Ferry Road, Saltney	14.60	58	31	**Available** Has outline planning permission for B1/B2/B8 uses (various consents) For sale as a freehold development site with consent for B Class employment	Yes Unless developed prior to LDP completion	14.60
EM1.25	Prince William Avenue, Sandycroft	1.80	43	18	**Available** Full application for six industrial/business buildings with a total floor space of 5,460 sqm under consideration by Flintshire County Council	Yes Unless developed prior to LDP completion	1.80
EM1. 26	Rowley's Drive, Shotton	0.70	59	26	**Available** Remaining land for sale for B1/B2/B8 employment uses	1-3 Not Serviced	0.70
EM2.1	Warren Hall, Broughton	36.50	76	48	**Available** Outline consent for B1 Business Park Welsh Government not actively marketing this site Was originally identified as second Chester Business Park however, is no longer a priority	Yes But FCC should seek assurances from Welsh Government that the site will ultimately be	36.50

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
					site Seen as secondary priority to development of EM1.12	developed	
EM2.2	DARA Site, Sealand	18.50	63	42	**Not Available** Development land in the north and other development plots/unused premises spread throughout the complex	No Further assessment needed to identify the real developable area here. The viability/deliverability of land should also be explored before allocating it to the next LDP	0
EM2.3	St David's Park, Ewloe	0.80	69	35	**Available** One large plot remains in the east suitable for another large self-contained office property or scheme of multi-let office suites	Yes	0.80
EM2.4	Mold Business Park Extension, Mold	5.00	37	24	**Not Available** Site is now being progressed for social housing through the SHARP Programme	No Now housing site	0
Planning Application 1	Airbus 1, Chester Road, Broughton	1.03	67	26	**Not available** Expansion land for Airbus	No Expansion land only	0
Planning Application 2	Airbus 2, Chester Road, Broughton	6.36	71	30	**Not available** Expansion land for Airbus	No Expansion land only	0
Planning Application 3	Corus Colours, Weighbridge Road, Deeside Industrial Park, Deeside	6.23	50	14	**Not available** Expansion land for Tata	No Expansion land only	0
Planning Application 4	Site off Aber Road, Flint	0.68	74	33	**Available** Full planning consent for the construction of new builders merchant building with associated yard	Yes Unless developed prior to LDP completion	0.68
Planning	Pany Y	0.34	63	18	**Not available**	No	0

Site Ref.	Name	Size, ha	Site Scoring - Total	Site Scoring - Market-led Sub-Total	Availability	Should it be Allocated in LDP	Net Land Supply
Application 5	Buarth Depot, Pant Y Buarth, Gwernaffield, Mold				Expansion land for A E Rowlands Plant Hire	Expansion land only	
Planning Application 6	Babbage Road, Engineer Park, Sandycroft	1.70	46	15	**Available** Outline planning consent for seven light industrial each of 1,000 sqm	Yes Unless developed prior to LDP completion	1.70
Planning Application 7	Bradford Soap Works, Minerva Avenue, Chester West Employment Park, Sealand	0.34	55	17	**Available** Full planning consent for the development of three light industrial units with associated parking comprising one workshop unit of 372 sqm and two workshops units of 204 sqm,	Yes Unless developed prior to LDP completion	0.34
Planning Application 8	Deeside Industrial Park – Zone 1, Deeside	1.90	57	25	**Available** Site is split across four area extending to 1.9 ha of vacant land Three of the four yards with planning consent for open storage are being marketed. The north-eastern site benefits from planning permission only, but is not being marketed	Yes	1.90
Total		**326.13**					**236.50**

Source: BE Group, 2014