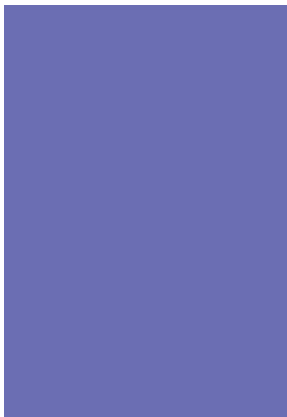
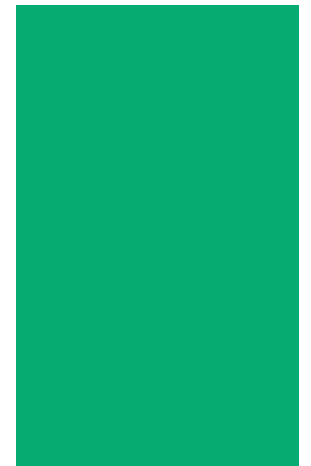


# Regional Employment Land Strategy for North Wales Strategy Document

North Wales Planning Authorities

June 2014



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# 1

## INTRODUCTION

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The Regional Employment Land Strategy for North Wales was developed on behalf of all seven North Wales planning authorities. The need for the strategy emerged through research undertaken by the North Wales Economic Ambition Board and follows the publication of 'North Wales Economic Ambition: A Strategy for Change'.

The commission builds upon the short term priorities identified in the strategy for change which recognises Inward Investment and Enterprise as two key economic drivers. In achieving the short term priorities, the strategy recognises the need for a new protocol for joint working in these areas of economic development; ensuring that all investment leads and decisions are dealt with in a coordinated and holistic manner.

Central to this is a need to understand the role and function of strategic employment sites across the region and planning clear investment priorities to ensure adequate supply of strategic employment land over the strategy period.

This coordinated approach is encouraged by the recently published TAN 23 Economic Development and the publication of the Draft Planning (Wales) Bill.

In-line with trends at the local level it can be concluded that the North Wales economy has an adequate provision of strategic employment land that is able to meet the needs of strategic investors going forward.

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## 2

# KEY LOCATION FACTORS

### 2.1 Why North Wales

#### Diverse Region

North Wales offers strategic employment sites for a diverse range of industries in a diverse range of urban and rural geographies.

#### Quality Lifestyle

North Wales is a region which offers a diverse range of urban and rural settlements with retail and leisure opportunities, surrounded by some of Wales' best kept coastal and inland natural environment.

#### Cost-effective

North Wales offers a cost competitive location for business with lower than average business rents, land values and wages.

#### Academic Excellence

North Wales contains two universities with strong industry linkages along with numerous higher education facilities which offer strong business links and a number of centres of excellence.

#### Workforce

With a population of approximately 688,000 and close proximity to Mid Wales and North West England, North Wales offers access to a quality workforce.

#### Enterprise Zones

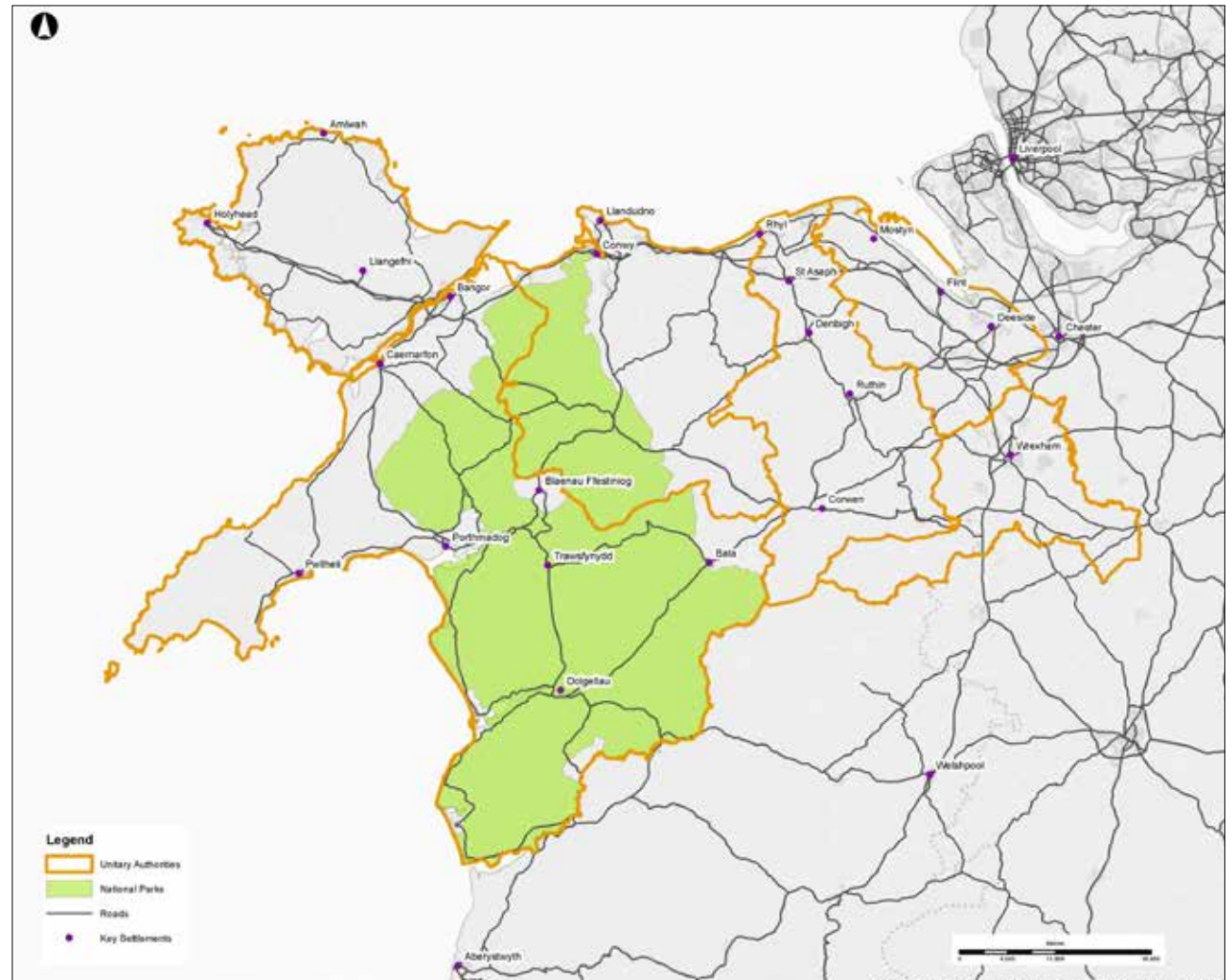
North Wales offers investor's access to three Enterprise Zones with opportunities for various investment incentives.

#### Established Centres of Business

A proven business location, the region is home to some of Wales' key employers in a number of priority sectors such as the automotive, aerospace and life science sectors.

#### Connectivity

Excellent strategic connectivity to some of the UK's major cities, Ireland and the West of England.



## 2.2 North Wales Economic Overview

- 309,800 people in employment in the year to September 2013, up 1% over the year
- GVA in 2012 of £10.6 billion, up 3% over the year;
- 53,400 enterprises active in North Wales in 2013;
- Foreign Direct Investment (FDI) contributes a large number of jobs to the North Wales economy;
- Excellent strategic linkages to workforce in West Cheshire and Mid Wales;
- In comparison to other Welsh regions, North Wales had the highest employment rate, the second lowest ILO<sup>1</sup> unemployment rate and the lowest inactivity rate.

Table 1 Employment by Sector (2012)

Highest Level of Qualification	North Wales	Wales
Advanced materials and manufacturing	22,807	78,146
Construction	15,620	69,125
Creative industries	3,810	14,174
Energy and Environment	3,174	113,609
Finance and Professional Services	24,330	134,992
Food and Farming	4,720	22,457
ICT	5,114	23,858
Life Sciences	4,076	9,722
Tourism	26,965	129,684
<b>TOTAL EMPLOYMENT</b>	<b>279,458</b>	<b>1,268,923</b>

<sup>1</sup> International Labour Organisation - the headline measure of unemployment covering those who are out of work and want a job, have actively sought work in the last 4 weeks and are available to start work in the next 2 weeks, plus those out of work, have found a job and are waiting to start in the next 2 weeks.

## 2.3 Skills and Academic Excellence

North Wales has a large pool of skilled workers, benefitting from good strategic connections into England on the eastern border and connections to Mid Wales on the southern border.

The region is home to two excellent further education (FE) colleges (Coleg Cambria and Grwp Llandrillo Menai) offering a wide range of practical vocational courses, many of which are linked directly to local employers and can provide bespoke training.

Table 1: Workforce Qualifications

Highest Level of Qualification	North Wales	Wales
NVQ Level 4 or Higher	137,501	614,116
NVQ Level 3	68,783	308,171
NVQ Level 2	92,986	393,819

The region is also home to approximately 21,000 students studying at either Bangor University or Glyndwr University.



## 2.4 Connectivity

North Wales benefits from excellent strategic connectivity to some of the UK's other major cities and transport hubs, offering key advantages for businesses looking to locate in the region. Connectivity by road and rail from a number of key locations across the region is shown below.

**Table 2 Holyhead Connectivity**

Destination	Distance (Miles)	By Road (hr:min)	By Rail (hr:min)
Liverpool	93	01:46	02:32
Manchester	119	02:05	02:51
Birmingham	175	02:52	03:26
Cardiff	197	04:29	05:57
London	289	04:46	04:12

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

**Table 3 Llandudno Connectivity**

Destination	Distance (Miles)	By Road (hr:min)	By Rail (hr:min)
Liverpool	54	01:08	01:43
Manchester	80	01:27	01:59
Birmingham	136	02:14	02:24
Cardiff	194	03:51	04:32
London	250	04:08	03:10

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

**Table 4 Wrexham Connectivity**

Destination	Distance (Miles)	By Road (hr:min)	By Rail (hr:min)
Liverpool	34	00:48	01:09
Manchester	53	01:04	01:43
Birmingham	70	01:35	01:42
Cardiff	139	03:12	02:57
London	184	03:33	02:46

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

### By Air and Sea

Alongside connections by road and rail the region also benefits from a number of connections by air and sea.

Anglesey Airport is located at RAF Valley, less than two miles from the A55 expressway. The airport offers twice daily flights (Monday to Friday) linking Anglesey with Cardiff, providing a strategic link between North Wales and Wales' Capital City.

Alternatively, Manchester Airport provides an important access point for the UK from Europe, Asia and America and offers easy access to North Wales, located between 50 and 120 miles from North Wales as shown in this section.

Liverpool John Lennon Airport also provides an important link for North Wales offering flights to a large number of European destinations.

Alongside these flight links, the region also benefits from

the Port of Holyhead which is operated by Stena Line Ports Ltd. The port provides strategic links to Ireland for both passenger and freight movements and is also a call location for a number of cruise vessels.

### Digital Connectivity

Through the continuing role out of the Welsh Government's Superfast Wales Initiative the whole North Wales region will benefit from excellent digital connectivity by 2016. Roll-out has begun in Denbighshire, Flintshire, Gwynedd and Anglesey while Conwy and Wrexham will benefit during 2014 and the remainder of the region will be upgraded by 2016.



## 2.5 Commercial Property & Investment Enquiries

North Wales is able to offer businesses a cost competitive location with a range of employment sites and premises to meet the needs of all key sectors. The region has a wide range of high quality business parks alongside more traditional industrial floorspace as well as a number of key inward investment locations.

The region also benefits from the presence of three Enterprise Zones, designated by the Welsh Government in order to strengthen the competitiveness of the Welsh Economy. Each area focusses on a key target sector and offer potential investors targeted business support, a range of support and incentives, competitive finance packages, academic support, ICT infrastructure support, faster planning decisions and excellent access to markets.

In North Wales, the identified zones include:

- Anglesey- focusing on the energy sector
- Deeside - focusing on the advanced manufacturing sector
- Snowdonia- focusing on the Energy and Environment and ICT sectors

Alongside these Enterprise Zones, the regions other employment sites currently house and attract a range of different investments. The table below highlights investment enquiries across the region for the 12 months to January 2014.

**Table 5 North Wales Inward Investment Enquiries**

Broad Sector	No. Enquiries (12 months to Jan 2014)
Services	18
Manufacturing and Engineering	21
Tourism /Retail / Leisure	9
Energy and Environment	15
Telecoms	3
Food	4
Distribution and Logistics	3

Source: Ashley Godfrey

The data shows enquiry rates to be highest within the manufacturing and engineering sector alongside service industries and businesses within the energy and environment sector, broadly reflecting current sector strengths and priorities in place to encourage investment in the region.



## 2.6 Lifestyle

Lifestyle is an important consideration in a business decision to invest in an area as well as the decisions of employees to relocate or remain in an area for employment opportunities.

North Wales offers a diverse geography which includes a number of main towns along with rural villages and coastal towns. The region prides itself on its natural environment and its heritage, providing a high quality of life for residents and visitors alike. The lifestyle offer links to the region's strong tourism sector with the Snowdonia National Park central to the region and a number of resort towns providing more traditional seaside destinations and activities.

The tourism sector is therefore not only a key sector for employment in the region, it also helps attract and retain investment in other sectors with a key role to play in reinforcing a distinctive and compelling national identity for Wales in the UK and Internationally as a place to visit, invest in and as a place to do business.

The North Wales planning authorities recognise lifestyle and tourism as key to place building, contributing to investment criteria and becoming more important to businesses who seek to encourage a high quality work/life balance for their employees.





### 3.1 Priority Sectors

The Welsh Government has identified a number of key sectors in which they will support industry-led investment. These sectors are supported by Sector Delivery Plans setting a number of short, medium and longer term priorities for each sector.

These key sectors are summarised below in the context of the North Wales region, identifying current sectoral strengths and key employers across the region.

#### Advanced Materials and Manufacturing

This sector maintains its position as one of the most important sectors in North Wales, continuing to support a high level of employment when compared to Wales. The sector has existing clusters in the North East of the region with particular strengths in the sub-sectors of aerospace, automotive and opto-electronics. Of the 12 companies in North Wales on the Welsh Government's Anchor Company list, six are within this sector.

#### Construction

The construction sector has been historically important within the region and is likely to continue to form a key sector, supporting growth in other sectors as well as supporting a large number of jobs with projects such as Wylfa Newydd.

#### Creative Industries

The creative industries sector in North Wales is focussed around small to medium sized enterprises with a small number of larger companies such as Cwmni Da, Gwynedd. The sector has an important role in the region moving forward, creating a business base which may attract larger investors.

#### Energy and Environment

North Wales is home to a number of strategic projects and initiatives within this sector. The Energy Island Programme, enterprise zones, nuclear new build and on-going investment in sub-sectors such as offshore wind seek to grow an energy hub within the region. Alongside this Welsh universities offer a range of courses specific to the needs of the energy and environmental sectors with long-term industrial linkages.

#### Finance and Professional Services

Financial and Professional Services (F&PS) is one of Wales' largest and fastest growing sectors. While a number of the key employers in the sector are located in South Wales with a focus on the M4 Corridor between Newport and Swansea, North East Wales has also 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 roll out of high speed broadband by 2015, this sector has the potential to continue to grow within the region.

#### Food and Farming

The food and farming sector is estimated to have a value of £6.5 billion in sales to the Welsh economy. The North Wales region contains a number of key companies within the Welsh food and farming sector and has seen a number of recent investments, which reflect the prominence of the sector in the region. Alongside these existing companies and investments, the sector also contains examples of strong academic/industry collaboration. In the North Wales region the Food Technology Centre in Llangefni is one of three food centres in Wales providing technical and practical advice and services to Welsh companies in the sector.

#### ICT

This sector currently has a South Wales focus, however, alongside the roll out of improved ICT infrastructure across Wales and promotion of the sector at some of the North Wales enterprise zones there is potential for further growth within the region.

### Life Sciences

The North Wales region contains a number of key employers within the sector, including Siemens Healthcare Diagnostics Products, Llanberis; ConvaTec Ltd, 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 Life Sciences Investment Fund in 2012. This £100 million fund seeks to invest in Life Sciences and related medical, pharmaceutical and healthcare companies in Wales.

### Tourism

The Tourism sector continues to make a valued contribution to the Welsh economy and is a key sector for many parts of the North Wales region, particularly with the presence of the Snowdonia National Park, the many resort towns such as Llandudno and key visitor attractions such as Portmeirion, and castles at Caernarfon, Conwy, Beumaris and Harlech, forming an integral part of the World Heritage Site.

The sector relies heavily on the high quality of the natural environment in the region, along with the rich heritage and culture offered by many destinations.

## 3.2 Priorities and Sector Programmes

In order to support growth across North Wales, a number of priority programmes and projects exist. These include:

- Wylfa Newydd – Construction of a new nuclear power plant at Wylfa on Anglesey;
- Science Park – development of a science park at Gaerwen on Anglesey in order to support growth and innovation in the energy and environment sector;
- The Energy Island Programme – a programme to put Anglesey and the region at the forefront of energy research and development, production and servicing;
- Advanced Manufacturing Skills Centre – as part of the proposed Northern Gateway development in Flintshire; and
- The Thornton Research and Technology Campus at Chester, which also serves North Wales and provides an important facility.

## 4.1 Spatial Strategy

The strategy aims to support the sustainable growth and development of the nine priority sectors, recognising that all sectors are important for the region as a whole (i.e. North Wales), while also identifying where certain sectors may have more of a geographic focus within the region (e.g. Advanced Materials and Manufacturing within the North East of the region). This recognises the differing priorities of strategic investments, often aligning to priority plans and programmes and/or locating around existing business clusters in order to benefit from supply chain opportunities. Where such geographic foci are identified it is key that moving forward the North Wales Planning Authorities seek to work together to ensure that strategic investment benefits not just the local area but the wider North Wales region.

## 4.2 Defining Strategic Sites

The strategy presented below provides an approach to the development and promotion of strategic employment land across the North Wales region. The strategy focusses on encouraging investment in the most sustainable locations.

The Sector Strategy assumes all nine sectors are important for the region, although identifying geographic sector strengths with which the North Wales Planning Authorities should work together to ensure greatest benefit for the region (e.g. supply chain and employment opportunities).

In developing the Site Strategy we have considered a number of factors which will influence future interventions and the likely demand for strategic sites across the region. This analysis has helped identify key employment locations and areas which perhaps require a greater supply of strategic employment land moving forward. The factors considered include:

### **Travel to Work Areas (TTWAs)**

Showing catchment areas for labour markets and likely travel to work distance which is a consideration in locating investment and/or seeking to develop strategies to increase employment catchments (e.g. worker bus services);

### **Housing Market Areas**

Identifying areas of likely population growth;

### **Administrative Areas**

Recognising current authority boundaries and also exploring cross border linkages, particularly to West Cheshire and Mid Wales;

### **Transport Networks**

A key consideration when looking at sectors requiring good communication links and access to strategic transport networks;

### **The flow of goods, services and information within the local economy**

To identify existing linkages and sector strengths;

### **Location of existing employment hubs and clusters**

Particularly important when considering sector growth which has a propensity to cluster;

### **Key settlements and regeneration areas**

Identified as locations of likely future growth and potential employment demand;

### **Policy drivers**

At both the national and local levels in order to ensure the strategy fits within the existing policy framework; and

### **Priority sector programmes and strategies**

In order to consider potential areas of the region which may require employment land due to programmes in place.

This appraisal has allowed us to consider the distribution of strategic employment sites across North Wales alongside the demand forecasts, identifying where the factors above may drive higher sectoral growth and therefore higher demand for strategic employment land.

## Hierarchy of SES

<p><b>Regional Strategic Sites</b></p>	<p>Sites of regional importance with a critical role in achieving regional and contributing to national economic development objectives, supporting key sector development.</p>	<p><b>Primary Site</b> site of sufficient scale and offering potential for significant investment.</p> <p><b>Secondary Site</b> Strategic sites that will support more indigenous growth and medium scale investment.</p> <p><b>Inward Investment</b> a site suitable for attracting and accommodating a single inward investor.</p>
<p><b>Sub-Regional Strategic Sites</b></p>	<p>Sites with a more general and localised focus for economic development than regional strategic sites with a focus on attracting employers that draw a workforce from wider than the local area.</p>	
<p><b>Regional Gateway and Logistics Sites</b></p>	<p>Airports, ports and logistics sites that offer sustainable passenger and/or freight distribution, serving more than a local market.</p>	

## 4.3 Strategy Timescales

The strategy is based on a 20 year timescale up to 2033. In considering site requirements and deliverability across this timescale, the site strategy is based on following broad timescales:

- Short Term – 0-5 years
- Medium Term – 5-10 years
- Long Term – 10+ years

Each site within the strategy is considered based on fit to these timescales, reflecting site deliverability and appeal to priority sector businesses. It is important to recognise however that market conditions and/or strategic investment decisions could alter the actual timescales under which a site or action is delivered. These timescales will be particularly important when considering the need for infrastructure or other investment prior to occupation of a given site. For example, access upgrades may be required in the short term in order to facilitate development of the site in the medium term.



## 4.4 Sector Strategy

The North Wales planning authorities, in line with the Welsh Governments priorities, recognise the importance of each of the nine key sectors for growth across the region.

The strategy recognises the importance of the following sectors to support economic growth, providing a basis on which to grow other key sectors:

- Tourism
- Construction
- Creative Industries

The strategy seeks to continue to grow the volume and value of tourism, recognising the importance of the sector in establishing an environment in which people want to live and work. The construction sector is key to enable growth in other sectors and the creative industries sector is considered important in creating a base on which other business may be attracted to the region.

The remaining nine sectors are considered to offer strong growth potential in the region and the strategy recognises the importance of working alongside sector panels at the national level in order to promote the strategic sites available in North Wales and encourage further investment within these key sectors. In particular, the region has a strong focus on the following key sectors:

- Advanced Materials and Manufacturing
- Energy and Environment
- Food and Farming
- Life Sciences

These sectors have been historically strong across the region and will continue to offer significant employment opportunities. The strategy seeks to support and encourage growth within these sectors, directing investment to the most suitable and sustainable locations, encouraging and promoting clustering of businesses wherever possible within the region.

The strategy also supports growth within the Financial Services and ICT sectors, encouraging growth on identified strategic sites where demand emerges and working with the national sector panels to encourage growth across the region.

## 4.5 Site Strategy

The strategy has identified a number of strategic sites across North Wales that offer potential for key sector investment in the short, medium and long term.

The strategy plan is accompanied by the narrative below and the sites presented in this document represent the immediate priorities for the region in terms of consented sites which are available for investment and/or priority sites to which investment demand should be directed in the short term. These sites are presented on pages 14 to 25.

The main strategy report also identifies a number of other sites which are considered to offer potential in the medium to long term. A list of these sites can be found on Page 26. It should be noted that the strategy does not preclude investment in these sites in the short term but seeks to focus investment on the more readily available strategic sites.

### Short Term

The short term strategy for North Wales is one which focusses on the following key actions:

- Delivery of the committed and/or consented sites;
- Infrastructure works and further work required to bring priority sites to market; and
- Marketing and promotion of those sites identified as quick wins in terms of their readiness for development.

Alongside this, the North Wales Planning Authorities should work to undertake some soft market testing in order to better understand the key sector needs across the region. This should focus on the following key sectors and sub-sectors:

- Advanced Materials and Manufacturing (Aerospace, automotive and opto-electronics);
- Energy and Environment (focussing on understanding the potential land requirements of the strategic investors active in North Wales);
- Life Sciences (seeking to build on existing investment and clusters).

Any investment potential in the short term, unless site specific in its inquiry should be directed to those sites identified as being priority in the short term.

### Medium Term

The medium term strategy for North Wales is one which focusses on the following:

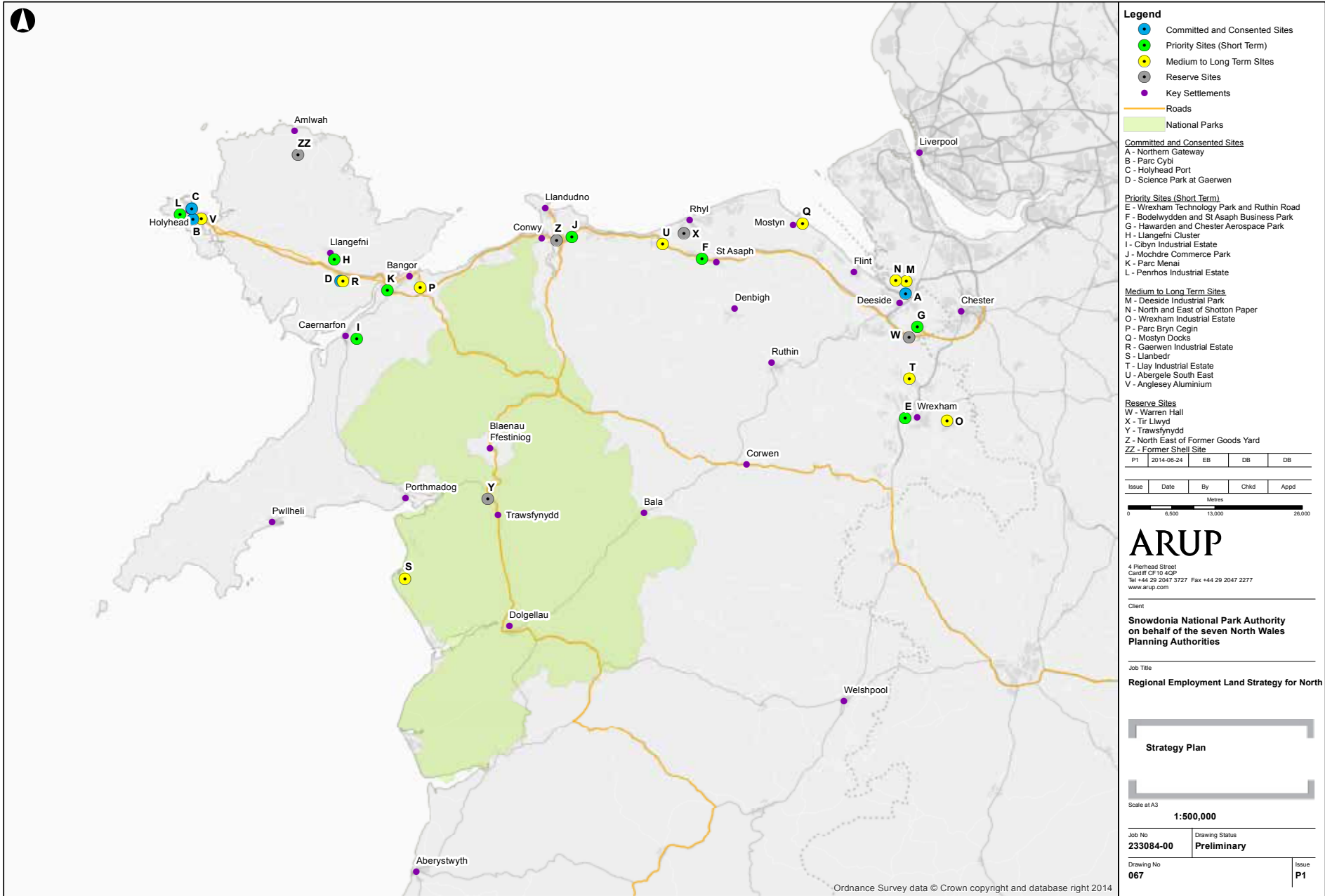
- Review of inward investment inquiries and a re-run of forecasts;
- Infrastructure works on identified sites should further space be required across the region;
- Progress on regeneration and rationalisation of sites

The medium term within the strategy will also see sites requiring infrastructure investment within the short term coming forward to market.

### Long Term

The long term strategy for the regions sites is difficult to predict given the current forecasts and uncertainty around strategic projects and programmes. The strategy should however consider the following actions:

- Further review of land take-up and rationalisation where necessary;
- Work closely with Horizon in order to understand and plan for any legacy benefit arising from Wylfa Newydd;
- Consider the need to bring forward reserve sites.



- Legend**
- Committed and Consented Sites
  - Priority Sites (Short Term)
  - Medium to Long Term Sites
  - Reserve Sites
  - Key Settlements
  - Roads
  - National Parks

**Committed and Consented Sites**  
 A - Northern Gateway  
 B - Parc Cylbi  
 C - Holyhead Port  
 D - Science Park at Gaerwen

**Priority Sites (Short Term)**  
 E - Wrexham Technology Park and Ruthin Road  
 F - Bodelwydden and St Asaph Business Park  
 G - Hawarden and Chester Aerospace Park  
 H - Llangefni Cluster  
 I - Cibyn Industrial Estate  
 J - Mochdre Commerce Park  
 K - Parc Menai  
 L - Penrhos Industrial Estate

**Medium to Long Term Sites**  
 M - Deeside Industrial Park  
 N - North and East of Shotton Paper  
 O - Wrexham Industrial Estate  
 P - Parc Bryn Cegin  
 Q - Mostyn Docks  
 R - Gaerwen Industrial Estate  
 S - Llanbedr  
 T - Llay Industrial Estate  
 U - Abergele South East  
 V - Anglesey Aluminium

**Reserve Sites**  
 W - Warren Hall  
 X - Tir Llwyd  
 Y - Trawsfynydd  
 Z - North East of Former Goods Yard  
 ZZ - Former Shell Site

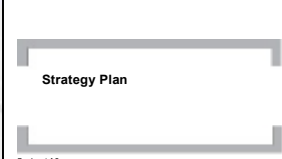
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Client  
**Snowdonia National Park Authority  
 on behalf of the seven North Wales  
 Planning Authorities**

Job Title  
**Regional Employment Land Strategy for North**



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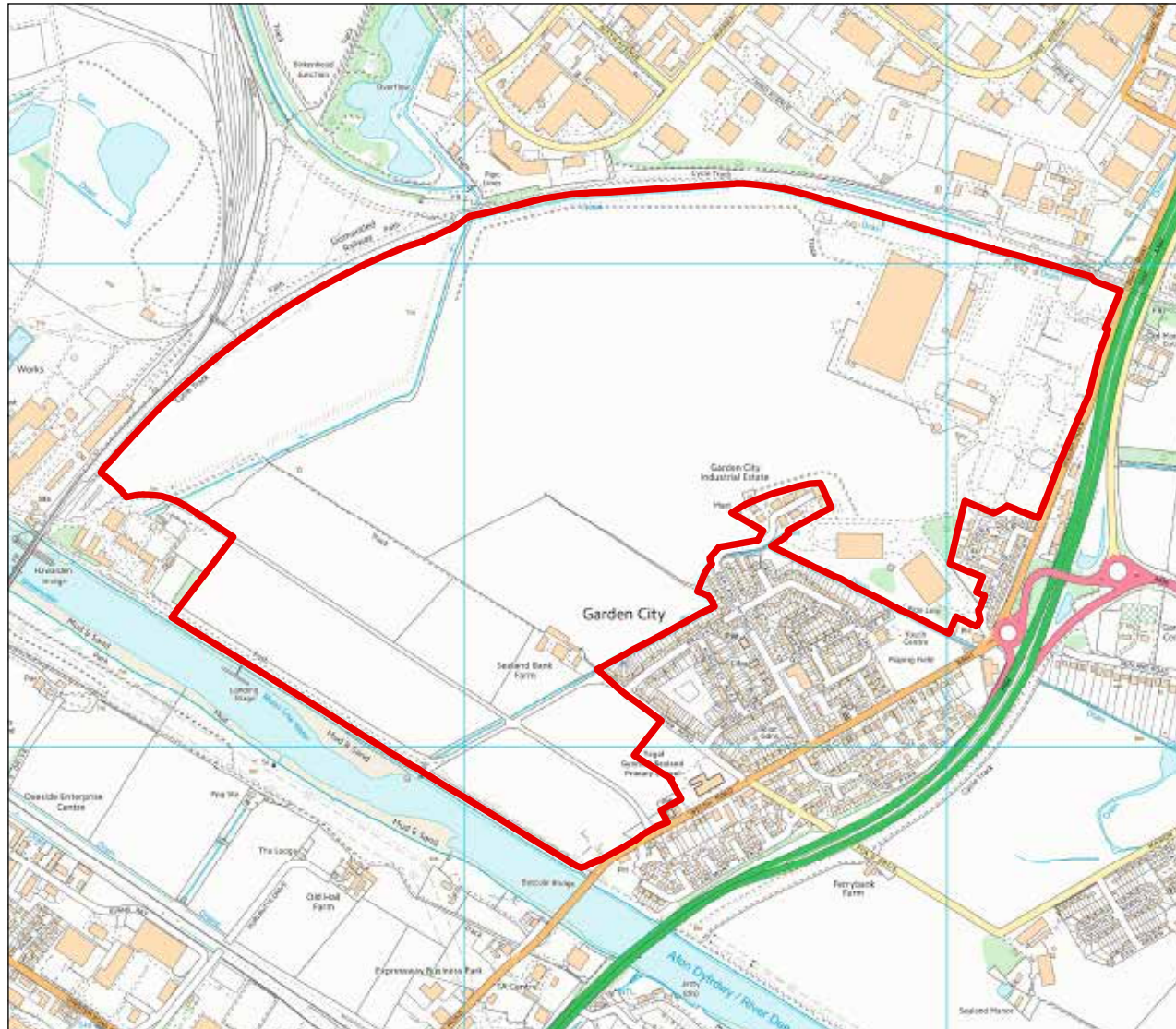
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**Preliminary**

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**P1**

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## A - Northern Gateway

(for location see map on page 13)



### SITE NAME AND LOCATION

Northern Gateway (SJ 32035 69674)

### CATEGORY

Committed / Consented

### DESCRIPTION

Mixed use development site with a range of housing and B use classes. The site will include the Advanced Manufacturing Skills and Technology Centre.

### SECTOR FOCUS

- Advanced Materials & Manufacturing
- Energy

### DEVELOPABLE AREA

98ha

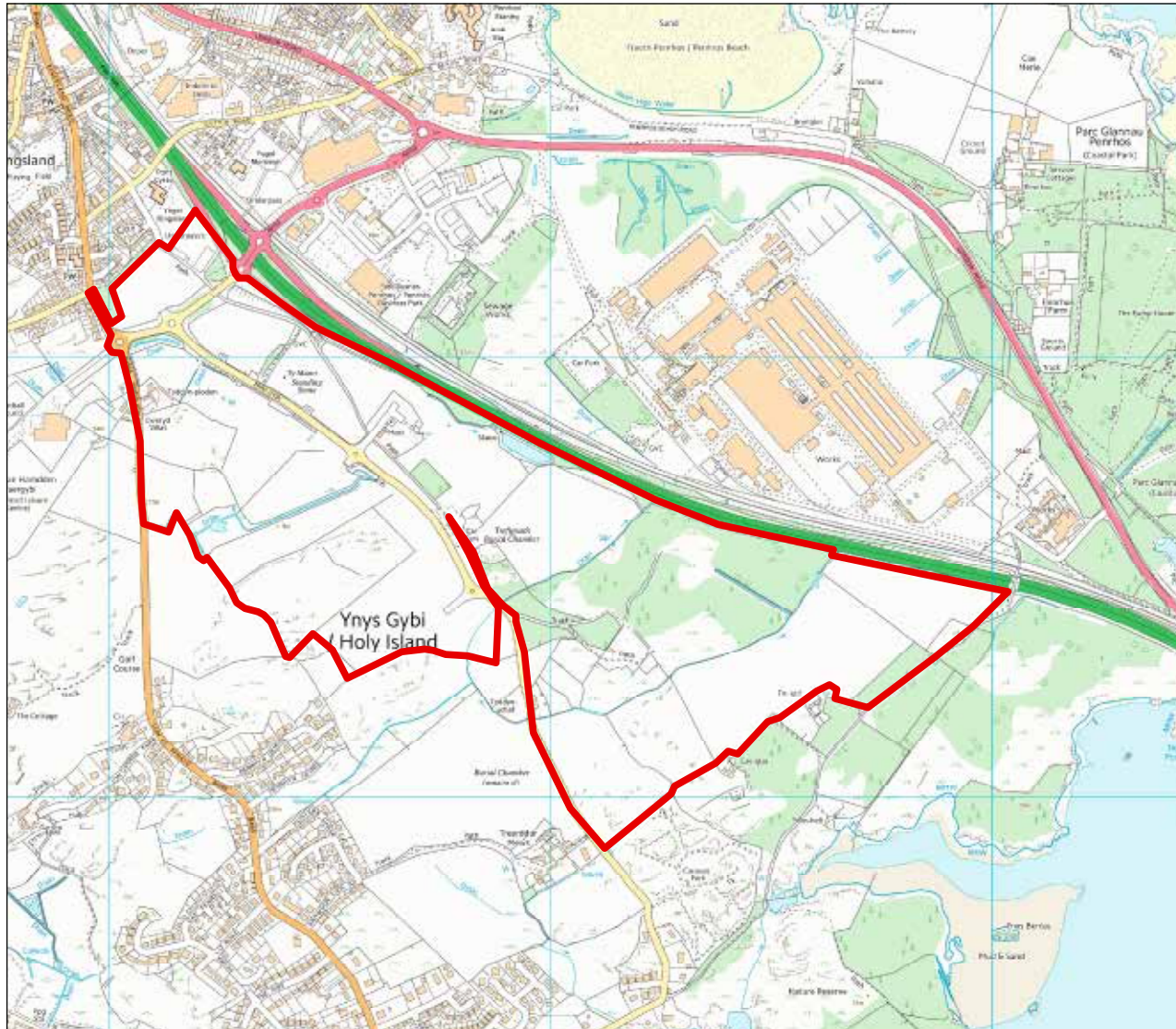
### INFRASTRUCTURE

Flood alleviation scheme recently completed by the Welsh Government.  
Site requires major infrastructure in relation to access improvements and internal services and circulation.



## B - Parc Cybi

(for location see map on page 13)



### SITE NAME AND LOCATION

Parc Cybi (SH 25372 80918)

### CATEGORY

Committed / Consented

### DESCRIPTION

Regional logistics/distribution site offering opportunities for a range of office and business units. The site also includes a truck stop in order to serve the port of Holyhead.

### SECTOR FOCUS

- Food and Farming
- Advanced Materials and Manufacturing
- Energy and Environment

### DEVELOPABLE AREA

53ha

### INFRASTRUCTURE

The site has benefited from investment in access infrastructure and therefore investment from future investors would focus on the provision of use specific buildings and services.

The site may benefit from investment from Horizon Nuclear as part of proposals at Wylfa Newydd.

## C - Holyhead Port

(for location see map on page 13)



### SITE NAME AND LOCATION

Holyhead Port (SH 25090 82768)

### CATEGORY

Committed / Consented

### DESCRIPTION

Mixed use development to include housing, some business provision and a new marina facility.

### SECTOR FOCUS

- Tourism
- Energy and Environment

### DEVELOPABLE AREA

10ha

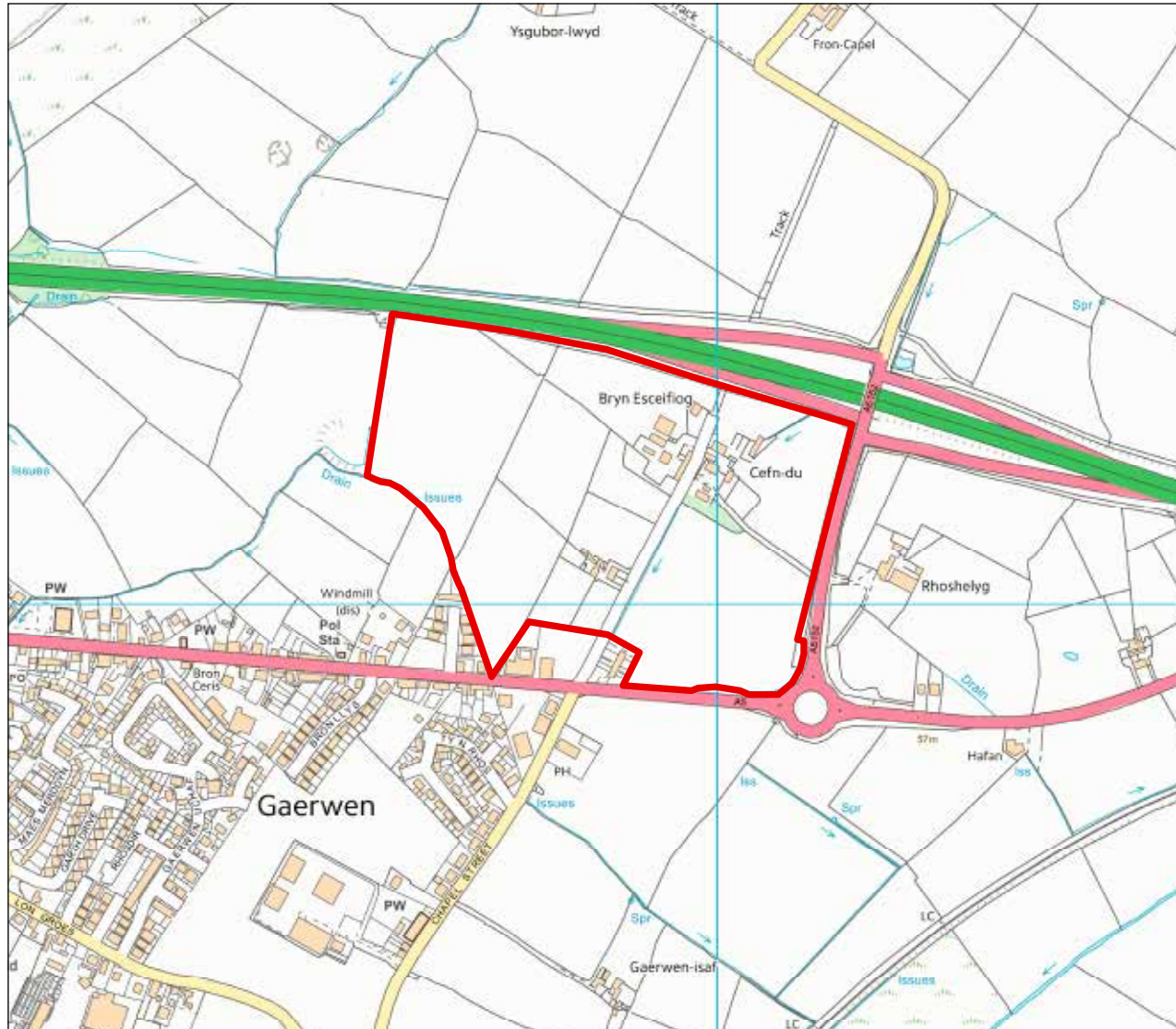
### INFRASTRUCTURE

The current proposals include a number of infrastructure proposals including investment in access infrastructure and services.



## D - Science Park at Gaerwen

(for location see map on page 13)



### SITE NAME AND LOCATION

Science Park at Gaerwen (SH 47955 71575)

### CATEGORY

Committed / Consented

### DESCRIPTION

Proposed science park project led by Bangor University. It is hoped that the site will attract hi-tech companies and support start-ups with a focus on the energy sector.

### SECTOR FOCUS

- Energy and Environment
- Advanced Materials and Manufacturing

### DEVELOPABLE AREA

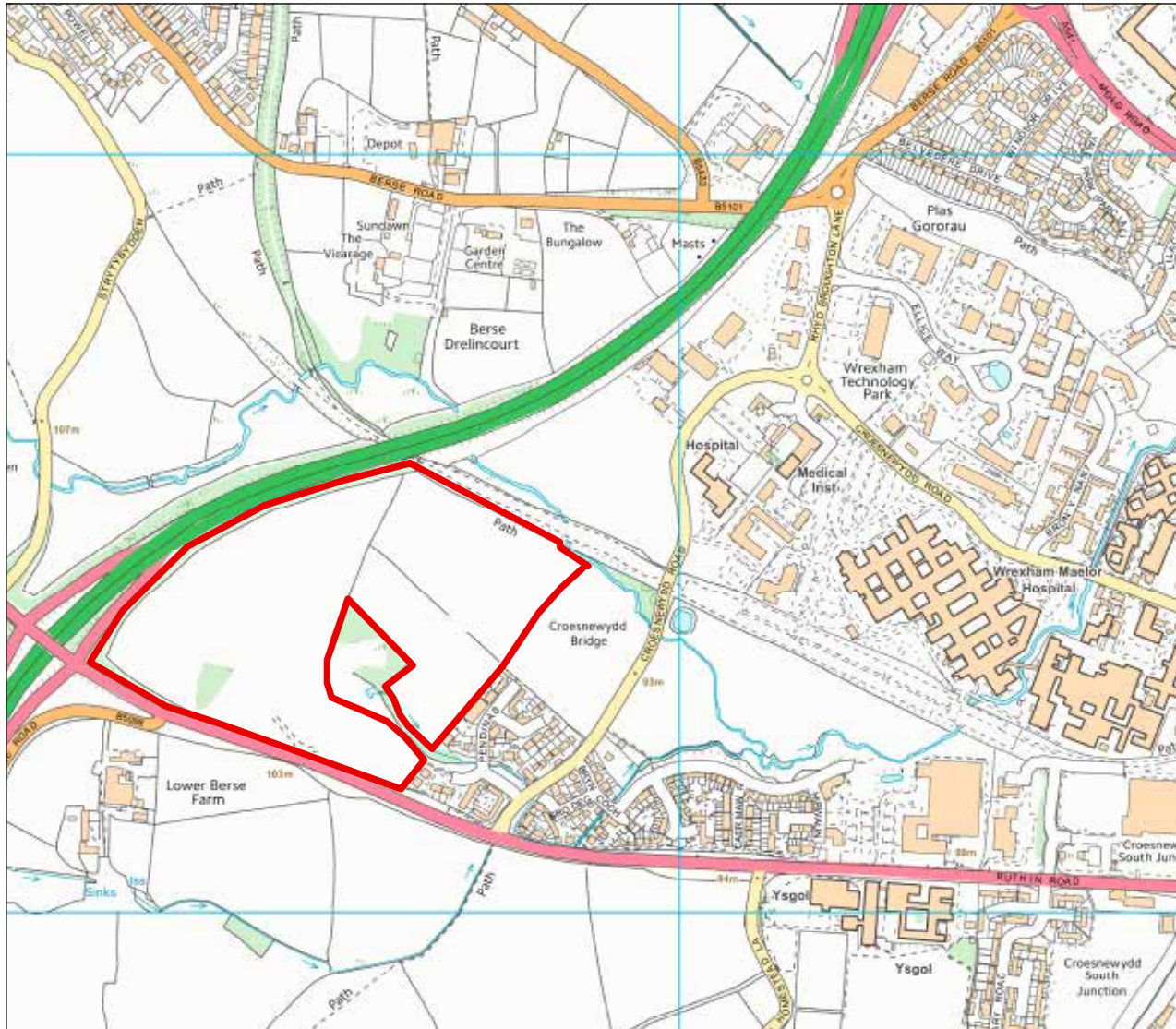
20ha

### INFRASTRUCTURE

The proposals are located on a Greenfield site outside of the boundary of the existing Industrial Estate. All necessary infrastructure will therefore be required including access infrastructure and utility services. A hydraulic modelling assessment may be required in order to determine an appropriate point of connection to the public sewer.

## E - Wrexham Technology Park and Ruthin Road

(for location see map on page 13)



### SITE NAME AND LOCATION

Wrexham Technology Park and Ruthin Road  
(SJ 31943 50496)

### CATEGORY

Regional Strategic (Primary)

### DESCRIPTION

This site is covered by the Western Gateway Development Brief. Uses on the site are currently limited to B1 and therefore the site has a focus on high quality office based accommodation. Potential extension of the current Wrexham Technology Park in order to create a strategically located, high quality employment site.

### SECTOR FOCUS

- Financial Services
- ICT
- Energy and Environment

### DEVELOPABLE AREA

14.5ha

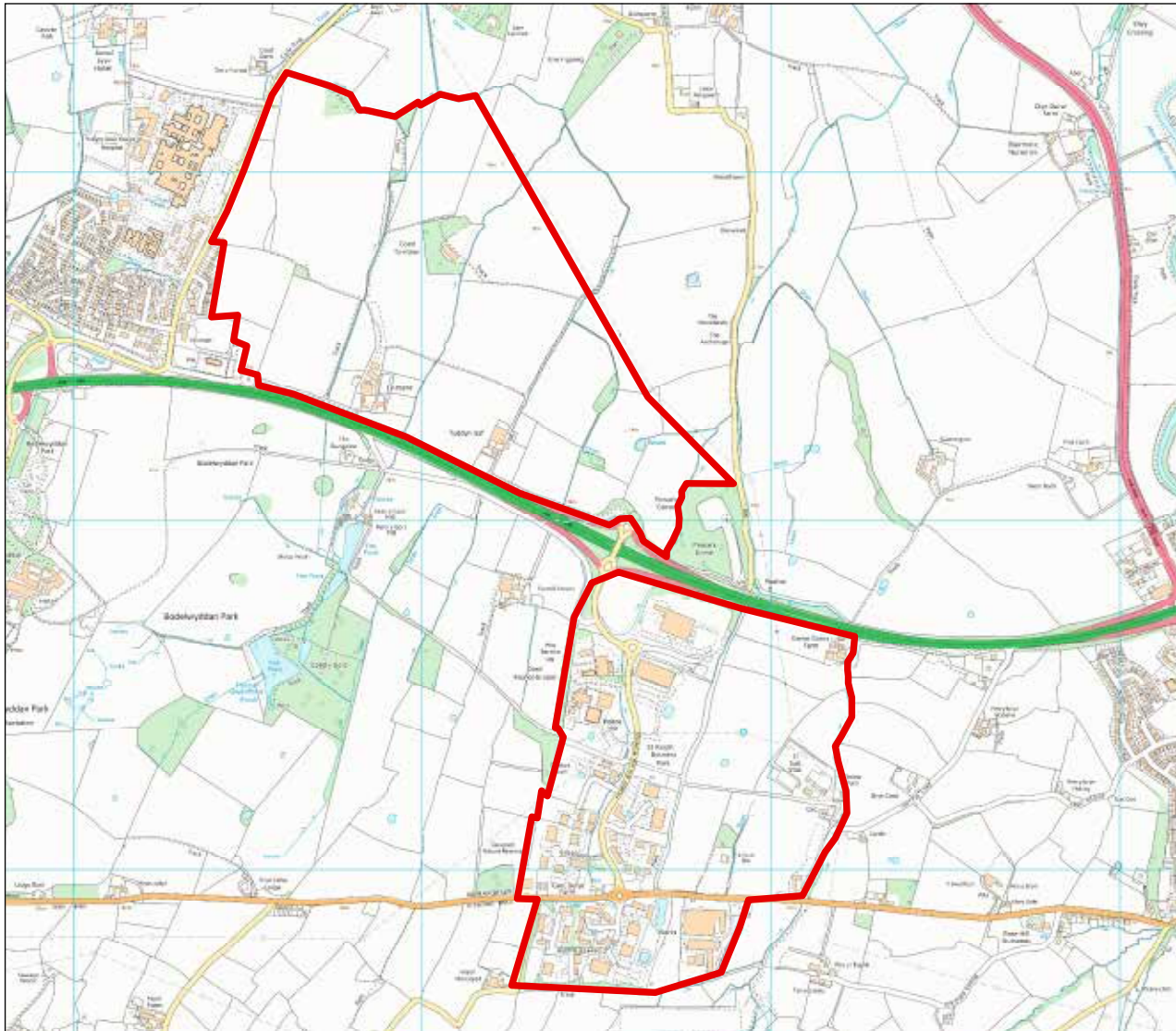
### INFRASTRUCTURE

In order to facilitate future development highway infrastructure works are required in line with recommendations within the Development Brief. This includes junction improvements from the A525 and a replacement bridge between the Technology Park and Ruthin Road. Alongside this utilities infrastructure would be required on the Ruthin Road site with necessary connections to utilities infrastructure.



## F - Bodelwydden and St Asaph Business Park

(for location see map on page 13)



### SITE NAME AND LOCATION

Bodelwydden and St Asaph Business Park  
(SJ 00893 75661 & SJ 01764 74301)

### CATEGORY

Regional Strategic (Inward Investment)

### DESCRIPTION

This site includes the established St Asaph Business Park alongside a strategic mixed use allocation at Bodelwydden. The current site has a focus on advanced materials and manufacturing as well as providing general B1 office accommodation. The Bodelwydden site is greenfield land.

### SECTOR FOCUS

- Advanced Materials and Manufacturing
- Energy and environment
- Financial Services

### DEVELOPABLE AREA

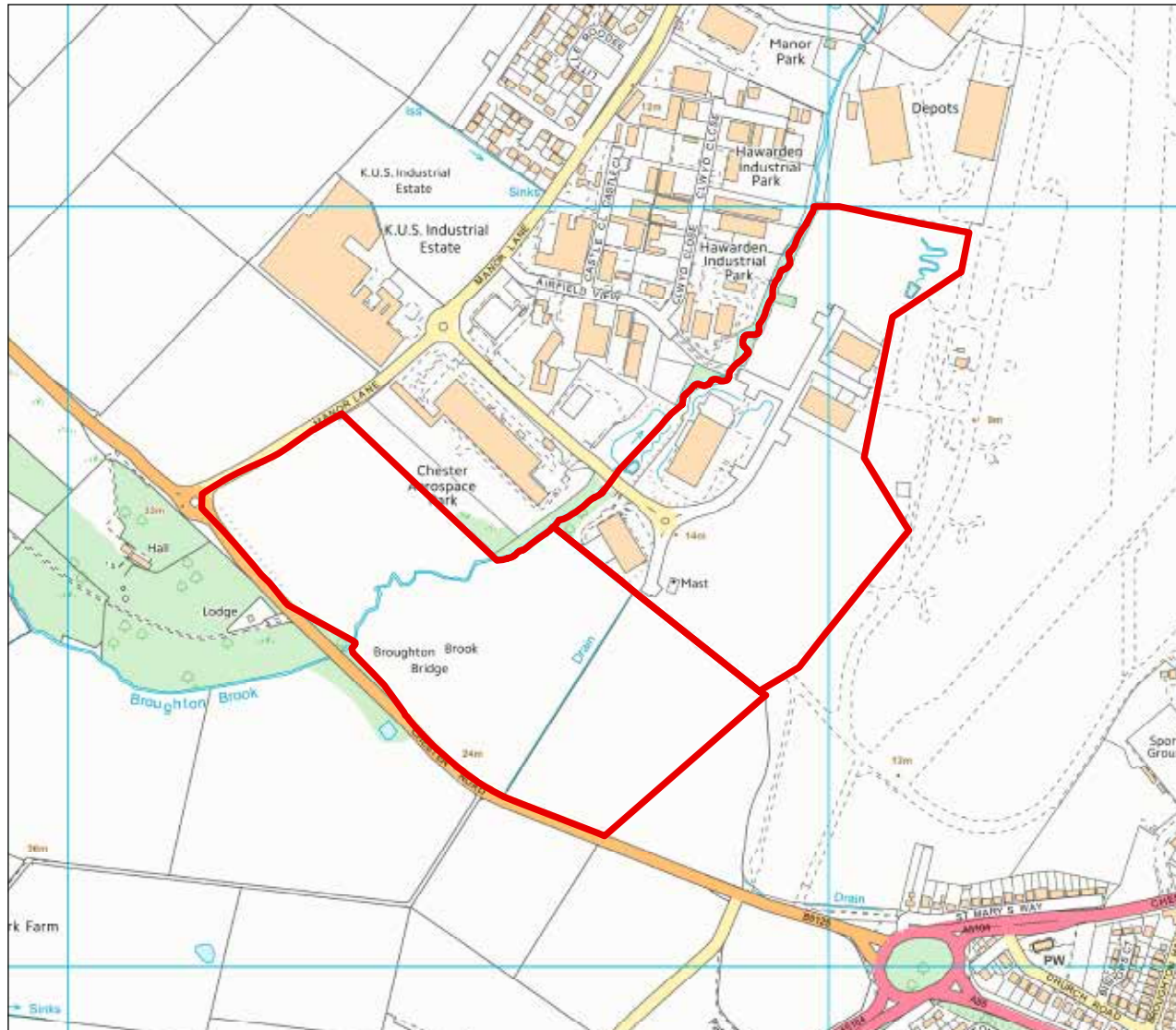
40ha

### INFRASTRUCTURE

Strategic development at Bodelwydden would require highway network investment between the existing A55 and Sarn Road. Consideration is also needed in order to connect the two employment sites alongside investment in public transport infrastructure. Some investment may come forward alongside the residential element of the Bodelwydden site.

## G - Hawarden and Chester Aerospace Park

(for location see map on page 13)



### SITE NAME AND LOCATION

Hawarden and Chester Aerospace Park  
(SJ 33806 64498)

### CATEGORY

Regional Strategic (Primary)

### DESCRIPTION

This strategic site is located within the Deeside Enterprise Zone and lies adjacent to Hawarden Airport. The site is specifically promoted for supply chain opportunities in relation to the aerospace sector.

### SECTOR FOCUS

- Advanced Materials  
and Manufacturing  
(Aerospace)

### DEVELOPABLE AREA

33.7ha

### INFRASTRUCTURE

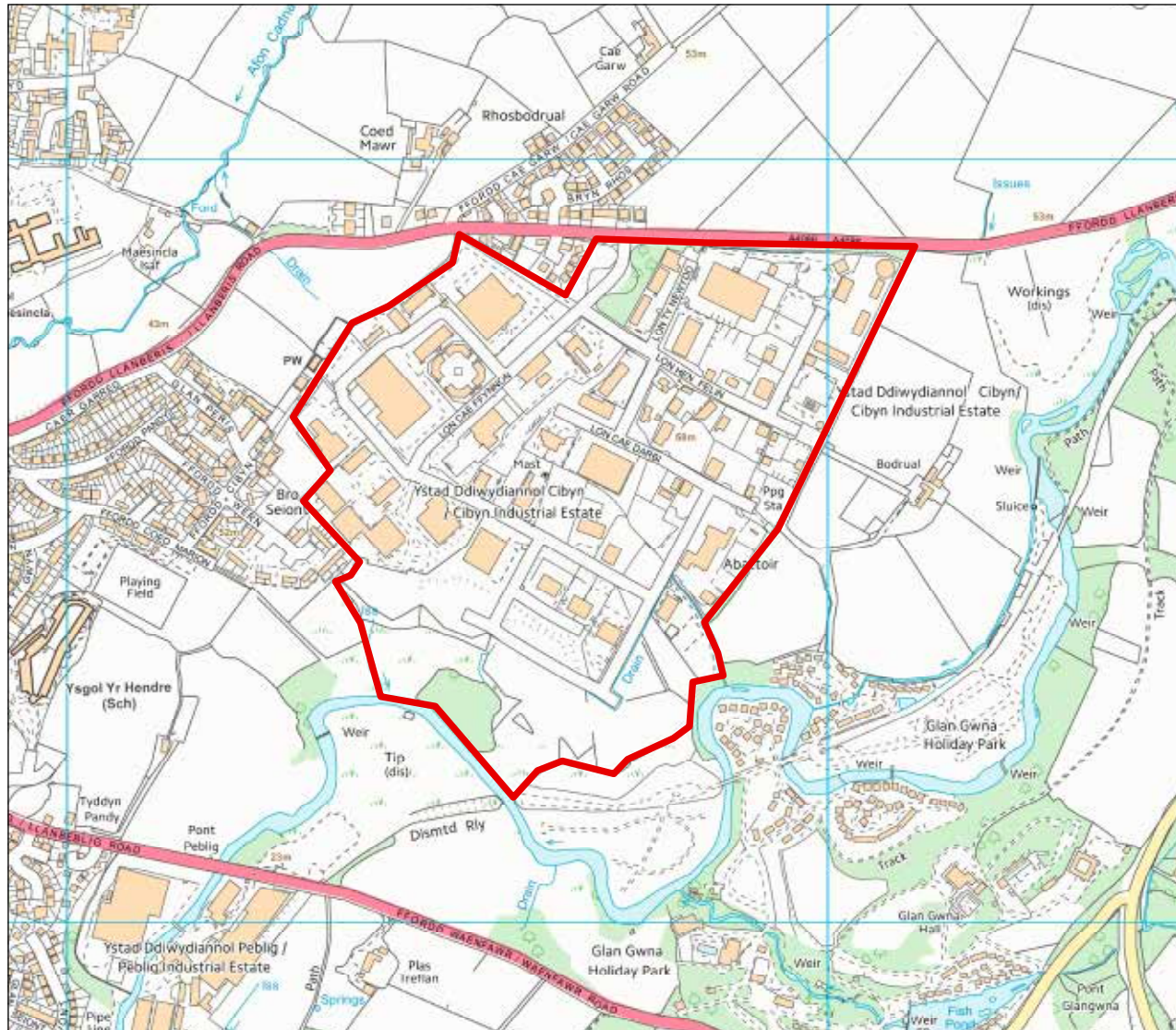
The current Masterplan site requires limited infrastructure investment. Any future expansion of the site would require masterplanning and utilities / access infrastructure.





## I - Cibyn Industrial Estate

(for location see map on page 13)



### SITE NAME AND LOCATION

Cibyn Industrial Estate (SH 49663 62666)

### CATEGORY

Sub-Regional (Primary)

### DESCRIPTION

Existing industrial estate with a number of vacant development plots which are well serviced by the existing road infrastructure and have potential for utility connections. The site is considered to offer potential for B1, B2 and B8 uses with a focus on small to medium size investment.

### SECTOR FOCUS

- Various with a focus on small to medium scale investment.

### DEVELOPABLE AREA

7.3ha

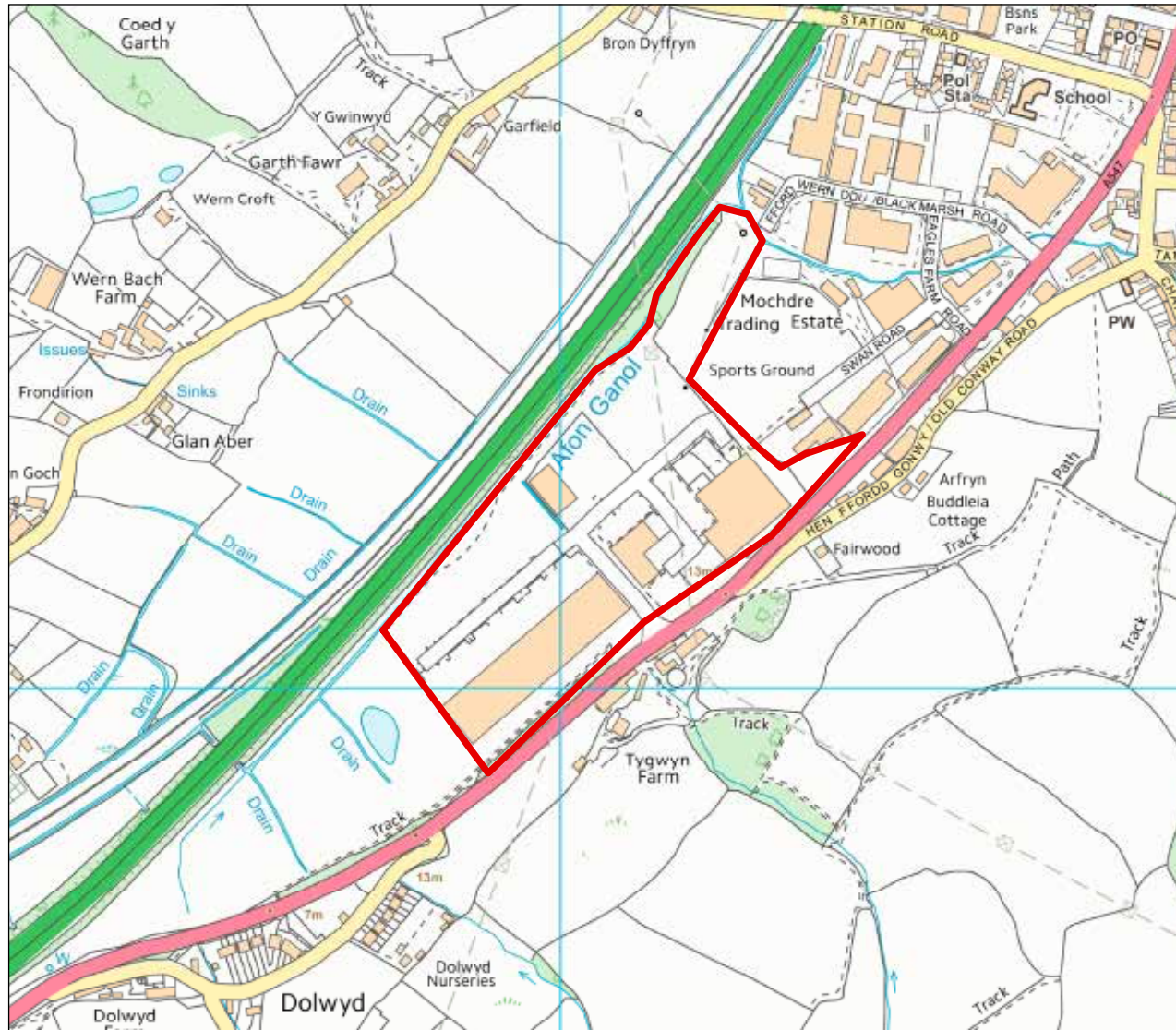
### INFRASTRUCTURE

The site has limited infrastructure requirements given its existing investment and infrastructure.



## J - Mochdre Commerce Park

(for location see map on page 13)



### SITE NAME AND LOCATION

Mochdre Commerce Park (SH 82020 78097)

### CATEGORY

Sub-Regional (Secondary)

### DESCRIPTION

Existing employment site which has seen recent infrastructure and occupier investment which includes industrial warehousing and office accommodation. The site offers potential for similar investment on the remainder of the site.

### SECTOR FOCUS

- Various

### DEVELOPABLE AREA

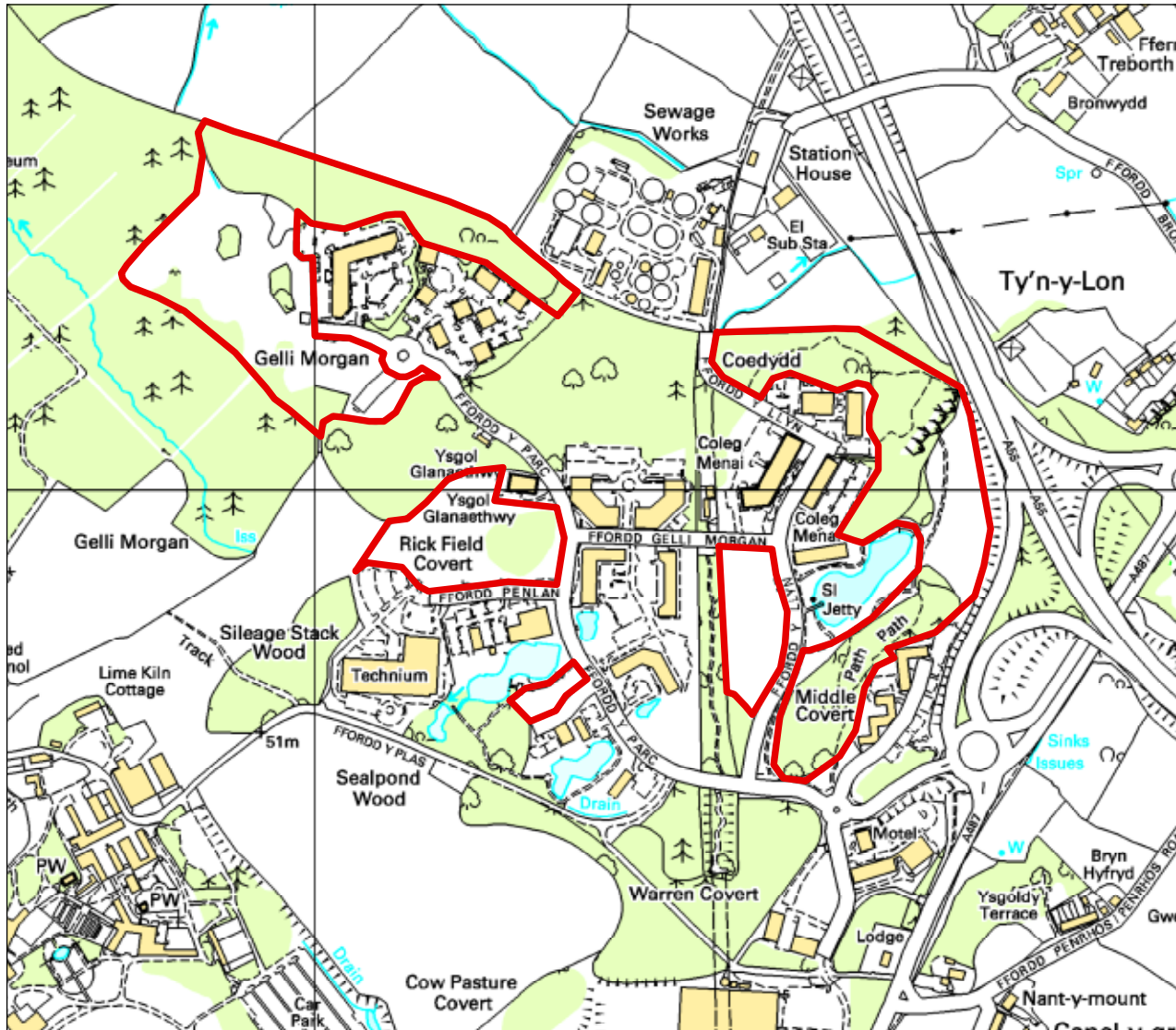
5ha

### INFRASTRUCTURE

Internal infrastructure is already established with limited future investment required.

## K - Parc Menai

(for location see map on page 13)



### SITE NAME AND LOCATION

Parc Menai (SH 54354 69886)

### CATEGORY

Sub-Regional (Secondary)

### DESCRIPTION

Existing high quality business park with a total of four available development plots. Size of the site is likely to restrict its potential uses to B1. Development of the site is likely to contribute towards investment, employment and activity that will maintain or strengthen the status of Bangor as a sub-regional centre.

### SECTOR FOCUS

- Various

### DEVELOPABLE AREA

6.3ha

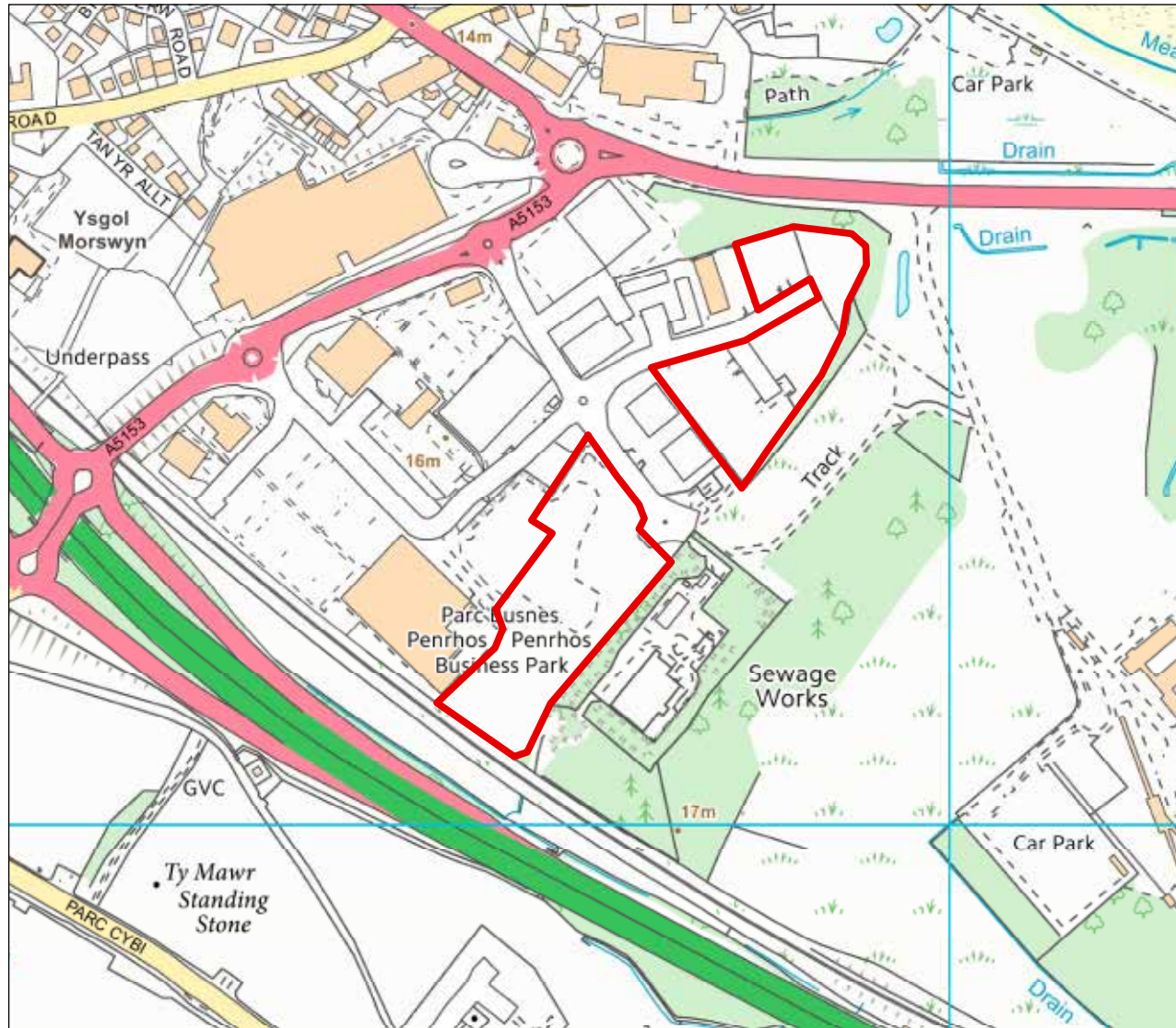
### INFRASTRUCTURE

Limited investment in infrastructure required given the established nature of the site. Investment in public transport facilities may be sought alongside any future development.



## L - Penrhos Industrial Estate

(for location see map on page 13)



### SITE NAME AND LOCATION

Penrhos Industrial Estate (SH 25715 81231)

### CATEGORY

Sub-Regional (Secondary)

### DESCRIPTION

Existing employment site with potential expansion for small to medium sized investors. The site offers a strategic location within close proximity to Holyhead Port and could be suitable for B1, B2 and B8 uses.

### SECTOR FOCUS

- Various

### DEVELOPABLE AREA

3.5ha

### INFRASTRUCTURE

The site has limited infrastructure requirements given its current operations.

## 4.6 Medium to Long Term Sites

Alongside the sites identified above, the strategy also identifies a number of sites which offer potential in the medium to long term. While these sites are not considered priority in terms of investment in the short term, this does not preclude development on them should investment interest emerge. The sites identified include:

	Site Name	Land Available (ha) <sup>1</sup>
M	Deeside Industrial Park	11.6
N	Land North and East of Shotton Paper	60
O	Wrexham Industrial Estate	93.6
P	Parc Bryn Cegin	35.9
Q	Mostyn Docks	4.8
R	Gaerwen Industrial Estate	22
S	Llanbedr	31.4
T	Llay Industrial Estate	16.5
U	Abergele South East	3.7
V	Anglesey Aluminium	54

<sup>1</sup> This figure represents the latest available developable area figure. It is recognised that land availability changes constantly and therefore this provides an approximate availability only.

The data shows enquiry rates to be highest within the manufacturing and engineering sector alongside service industries and businesses within the energy and environment sector, broadly reflecting current sector strengths and priorities in place to encourage investment in the region.

The strategy has also identified a number of 'reserve sites'. These sites represent sites that either require significant investment prior to becoming available to market, or sites that offer potential for sectoral investment, should further land be required during the course of the strategy, over and above the primary and secondary supply identified. This could arise if demand outperforms supply and/or if the role of strategic employment sites changes over time (e.g. if other uses or investment change the nature of the site or the site is considered as a departure from the local plan for another use).

	Site Name	Land Available (ha) <sup>2</sup>
W	Warren Hall	36.5
X	Tir Llwyd	27.9
Y	Trawsfynydd	50
Z	NE of Former Goods Yard	0.4
ZZ	Former Shell Site (Rhosgoch)	82

<sup>2</sup> 54ha taken up by Lateral Power proposals

The Regional Employment Land Strategy for North Wales was developed on behalf of all seven North Wales planning authorities. The need for the strategy emerged through research undertaken by the North Wales Economic Ambition Board and follows the publication of 'North Wales Economic Ambition: A Strategy for Change'.

The commission builds upon the short term priorities identified in the strategy for change which recognises Inward Investment and Enterprise as two key economic drivers. In achieving the short term priorities, the strategy recognises the need for a new protocol for joint working in these areas of economic development; ensuring that all investment leads and decisions are dealt with in a coordinated and holistic manner.

Central to this is a need to understand the role and function of strategic employment sites across the region and planning clear investment priorities to ensure adequate supply of strategic employment land over the strategy period.

This coordinated approach is encouraged by the recently published TAN 23 Economic Development and the publication of the Draft Planning (Wales) Bill.

In-line with trends at the local level it can be concluded that the North Wales economy has an adequate provision of strategic employment land that is able to meet the needs of strategic investors going forward.

# 5

## REGIONAL RECOMMENDATIONS

### 5.1 Regional Recommendations

The strategy has identified a large portfolio of strategic employment sites across North Wales that will adequately fulfil forecast demand for such employment land over the strategy period to 2034. However, this does not preclude new sites coming forward within the region and the following section provides some regional recommendations that will support the development of strategic sites across North Wales.

#### **Recommendation R1 – Flexible Planning Policy**

All North Wales Planning Authorities should include within the local development plans sufficiently flexible policies in order to support new strategic employment land coming forward should it be considered essential to support a programme or a potential investor with specific site requirements.

Such a need could arise on a new site which falls outside of this strategy and local land use allocations or as an extension to an existing site. In both instances, this policy should facilitate strategic level economic development opportunities.

Justification – to ensure future potential strategic investment is not precluded and allow sites not identified at the local or regional level to come forward should investment demand emerge and impacts of such development be manageable.

#### **Recommendation R2 – Site Investment Programme**

The North Wales Planning Authorities should work together in order to develop a programme of investment in relation to the priority sites identified within the Strategy. This programme of investment should include all necessary infrastructure investment and/or further feasibility work required in order to ensure sites remain viable and attractive to key sector investors.

*Justification – The programme will focus future investment on a small number of identified priority sites and encourage the North Wales Planning Authorities to plan and programme infrastructure investment alongside one another.*



**Recommendation R3 – Monitoring and Review of Take-Up**

The North Wales Planning Authorities through the Economic Development Officers should continue to develop and maintain a system of tracking investment inquiries on a single shared database. Tracking should as a minimum include the following information:

- Sector;
- Inquiry size (site area or floorspace)
- Dominant use class
- Specification
- Reason for inquiry
- If investment doesn't emerge, reason for not locating in North Wales.

This monitoring framework should allow for a consistent definition of employment sites across North Wales (e.g. strategic, sub-regional or local).

*Justification – to enable the North Wales Planning Authorities to monitor demand across the region and more importantly understand investment decisions (positive or negative). Such information will be beneficial in any future updates of the strategy.*

**Recommendation R4 – Enterprise Zone Monitoring**

The North Wales Planning Authorities through the Economic Development Officers should work closely with the Welsh Government Enterprise Zone team in order to monitor potential displacement of existing businesses in North Wales to the EZ in order to receive related benefits.

*Justification – to enable an appreciation of the success of the Enterprise Zones in North Wales in the context of effect on other existing employment sites. This will again be useful in updating this strategy and local level employment land reviews.*

**Recommendation R5 – Sector Development / Testing**

The North Wales Planning Authorities 'through the Economic Development Officers should work with the Sector Panels at the national level in order to promote North Wales strategic sites to potential investors and ensure that Welsh Government recognise the key sector strengths of the region and the opportunities to cluster around existing strategic investors.

The Authorities should consider some soft market testing in order to better understand the growth plans of their existing key employers as well as gauge potential market interest from other investors. This would assist in retaining exiting investors and attracting/promoting the region to future investors.

*Justification – In order to ensure adequate promotion of the North Wales market within the key sectors.*

**Recommendation R6 – Wylfa Newydd**

The North Wales Planning Authorities should continue to work closely with Horizon in relation to site requirements and supply chain opportunities. This work should be undertaken in line with the objectives of the recently published Draft SPG for Wylfa Nuclear New Build and the Topic Papers produced in support of the Joint Local Development Plan.

*Justification – In order to ensure that Horizon are able to deliver the proposed nuclear new build sustainably, securing the necessary associated developments working alongside the Isle of Anglesey County Council in order to bring the greatest legacy benefits to the region.*

**Recommendation R7 – Update & review**

The North Wales Planning Authorities should undertake regular review and update of this strategy in order to ensure it remains relevant to the development of strategic employment sites in North Wales and reflects changes that emerge due to priority programmes such as the Energy Island Programme.

This will also ensure that the strategy remains valid alongside emerging and updated local development plans and any future regional or sub-regional collaborative studies / work.

*Justification – In order to ensure the strategy remains relevant and up to date.*

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