

Wrexham Local Development Plan 2013 - 2028

Final Report - October 2015

Employment Land Review Wrexham County Borough Council and Flintshire County Council

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Flintshire County Council



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CONTENTS

EXECUTIVE SUMMARY	1
1.0 INTRODUCTION	11
2.0 STRATEGIC CONTEXT	20
3.0 SOCIO-ECONOMIC PROFILE	67
4.0 PROPERTY MARKET – GENERAL.....	84
5.0 PROPERTY MARKET – ANALYSIS	111
6.0 EMPLOYMENT LAND.....	121
7.0 STAKEHOLDER CONSULTATIONS	192
8.0 COMPANY SURVEY	231
9.0 GROWTH FORECASTS.....	252
10.0 CONCLUSIONS	287
11.0 RECOMMENDATIONS.....	324

Appendix 1 – List of Consultees

Appendix 2 – Wrexham Vacant Property Schedules

Appendix 3 – Flintshire Vacant Property Schedules

Appendix 4 – Wrexham Site Proformas

Appendix 5 – Flintshire Site Proformas

Appendix 6 – Sites Scoring System

Appendix 7 – Wrexham Site Scoring Assessment

Appendix 8 – Flintshire Site Scoring Assessment

Appendix 9 – Flintshire Employment Areas Proformas

Appendix 10 – Wrexham Employment Areas Proformas

Appendix 11 – Wrexham Business Survey

Appendix 12 – Flintshire Business Survey

Appendix 13 – Developer Marketing Standards

Appendix 14 – Employment Sites Summary and Recommendations

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 (served or unserved) 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.
Rossett/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 transshipment 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