

The Oaks, Cefn Park, Wrexham

Employment Market Study

SAV/CPDL/EMR/001



Contents

Executive Summary	2
1.2. Report Context.....	5
1.3. Purpose	5
1.4. Methodology and Report Structure	6
2. Site Context and Proposed Development	7
2.1. Introduction.....	7
2.2. The Site Context	7
2.3. Proposed Development	7
3. Planning Policy Context	9
3.1. Introduction and Summary.....	9
3.2. National Planning Policy	9
3.3. Local Planning Policy.....	10
4. Review of Relevant Evidence Base Documents	15
4.1. Introduction and Summary.....	15
4.2. Wrexham Local Authority Employment Evidence Base	16
5. Property Market Areas	20
5.1. Introduction.....	20
5.2. Wider PMA	20
5.3. WBC PMA	21
5.4. Wrexham Industrial Estate.....	22
6. Analysis of Industrial Market	24
6.1. Introduction and Summary.....	24
6.2. Supply of Industrial and Light Industrial Premises	25
6.3. Demand for Industrial and Light Industrial Premises	30
6.4. Demand Forecasts	33
6.5. Demand Drivers.....	35
6.6. Supply-Demand Balance	37
7. Employment Benefits of Development Proposal	39
7.1. Introduction and Summary.....	39
7.2. Construction Jobs	39
7.3. Operational Jobs.....	41
7.4. Conclusion.....	43
8. Site Appraisals	44
8.1. Introduction and Summary.....	44
8.2. Site Appraisal Methodology	44
8.3. Initial List of Potential Assessment Sites	45
8.4. Assessed Sites	51
8.5. Overall Conclusions From the Site Assessment.....	53
8.6. Additional Assessment of The Oaks Including Results of Site Marketing	60

Executive Summary

Savills has been commissioned by Cefn Park Developments (CPD) to undertake an Employment Market Study to accompany the planning application at The Oaks. The development proposal has an indicative floorspace of 17,100 sqm gross floor area (GFA) and is located within the Wrexham Industrial Estate.

The report addresses comments in the Wrexham Borough Council (WBC) officers report for CPD's refused 2019 planning application at the same site. The officers report referenced the Wales Technical Advice Note (TAN) 23: Economic Development which states: *'where a planning authority is considering a planning application that could cause harm to the environment, it will be necessary to assess whether there are any 1) alternatives to the proposal, 2) the number of jobs accommodated on the site and 3) whether the development would make any special contribution to policy objectives.'*

They key findings is the report are:

- There has been an acute shortage of employment floorspace since 2014 which is limiting WBC's economic growth.
- WBC's evidence base documents and Savills independent market assessment both conclude that there is insufficient floorspace to meet existing and anticipated demand at the Wrexham Industrial Estate and across WBC.
- WBC's evidence base shows that since the 1990s there has been significant under-delivery of employment land and premises that is contributing to the ongoing acute shortage
- A comprehensive site assessment exercise concludes that The Oaks is amongst the most commercially attractive, sustainable and deliverable employment site at the Wrexham Industrial Estate
- The marketing exercise by CPD resulted in 19 formal enquires about premises at The Oaks
- The proposed development is estimated to generate 57 construction jobs for local residents and 201 operational jobs for local residents
- The proposed development would support several of WBC's strategic policy objectives including Policy PS3 which states: *'Development should use previously developed brownfield land comprising vacant, derelict or underused land in preference to the use of greenfield land'*
- WBC's reliance on a single proposed employment land allocation in its Draft Local Plan is a risky and less sustainable way of addressing the acute shortage of employment land and premises. Permission should be granted to The Oaks because it is amongst the most commercially attractive sites in the estate; its development is sustainable given its brownfield status; it is deliverable given the demonstrated commercial interest; and it could contribute meaningfully to the acute shortage of premises.

This primary purpose of this report is to address each of the three relevant points set out in the TAN 23. For the first point, Section 8 presents a site appraisal exercise in which The Oaks is compared with all other potential development sites. This considers *'alternatives to the proposal'* which is set out TAN 23. The report identifies 23 sites that are available for development to meet market demand. Amongst the 23 assessed sites, The Oaks is amongst the most appropriate based on the defined assessment criteria including sustainability (doing least environmental harm), commercial attractiveness and deliverability. It is third best across WBC. The Oaks is a well-located and easily accessed former employment site that sits within WBC's key employment cluster. The development proposal also

Employment Market Study

The Oaks, Cefn Park, Wrexham



contributes significantly to a range of employment, ecological, historic and amenity-related considerations. The assessment does not include a formal analysis of the relative ecological or environmental benefits of the site. This report is a commercial assessment that primarily considers the suitability of the site for development of employment use.

The second point in TAN 23 is about the number of jobs created at The Oaks. This is covered in Section 7. Based on the indicative site plan, the proposed development is estimated to generate an average of 81 on-site construction jobs per year and 57 on-site construction jobs for WBC residents. This would be over an estimated two-year construction period. Once complete and occupied the proposed premises are estimated to create around 287 on-site operational jobs with 201 of them for WBC residents.

The third point in TAN 23 is about whether the development would contribute to WBC's policy objectives. Section 3 identifies a range of existing policies including Policy PS3 which states: '*Development should use previously developed brownfield land comprising vacant, derelict or underused land in preference to the use of greenfield land, wherever possible...*' As a brownfield site, The Oaks would support this policy. The site would also help WBC address decades of under-delivery. The existing Local Plan had an aspiration to deliver 20 hectares of employment land per annum. However WBC only achieved 30% of this target over the 1996 to 2011 plan period. As a result of the historic shortfall there has been a sustained acute shortage of employment land and premises since 2014, resulting in a supply constrained property market. The Oaks would contribute 5.6ha towards addressing the shortage of deliverable land and floorspace. The majority of existing premises that are currently available are of either average or below average quality, and fail to meet the demands for modern industrial employment space. Because of the shortage of premises since 2014 there is strong indication that economic and employment growth could have higher than it was if any additional employment land were made available.

In addition to demonstrating that the three elements of TAN 23 are met, this report presents an independent property market assessment. The supply situation in WBC and Wrexham Industrial Estate shows an acute shortage of premises. The WBC draft Local Development Plan's single employment land allocation on greenfield land is a risky and unsustainable way to address the acute shortage of employment land and premises. The site is not at the point of delivery and therefore there will still be considerable unmet need for the foreseeable future. The development of both the greenfield allocation and The Oaks would be complimentary rather than competitive due to the scale of demand. There is a clear and present need for WBC to grant planning for additional employment land to address the need for new premises at the Wrexham Industrial Estate for both existing firms and inward investors.

Overall rates of availability in WBC and Wrexham Industrial Estate are 2.0% and 2.1% respectively. Since 2014 the property markets have exhibited extremely supply-constrained conditions which continues to hold back economic growth in WBC.

Nearly all the premises in WBC (both occupied and available) are of average or below average quality. There are no premises in WBC that meet the requirements of modern occupiers. (These problems are corroborated in WBC's own evidence base.)

It is generally accepted that property markets require an 8% vacancy rate to provide a suitable amount of available options so that the market can operate efficiently. (The 2015 ELR refers to a rate of between 7% and 10% as appropriate to ensure the market operates efficiently.) To achieve an 8% level of availability, WBC requires close to 1 million sqft of vacant floorspace. However there is only about 250,000 sqft of average or below average quality currently available. The Oaks could deliver about a third of the premises needed to achieve an 8% level of availability.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Demand forecasts based on either trend growth (which reflects supply-constrained conditions) or a less-constrained scenario both show strong levels of demand that are unable to be met in WBC given the current acute shortage of premises.

The supply-demand balance based on trend growth in net absorption shows that there is less than half a year's supply of floorspace to meet demand. This includes floorspace under construction. Whilst there is a modest pipeline of development proposals, it is insufficient to meet existing and anticipated demand. This result points to a local economy that has been unable to respond to current and future economic opportunities. Without new high quality floorspace coming forward in well located areas the ongoing shortage will continue to constrain economic growth. The Oaks could deliver much needed high quality space to service current demand and alleviate supply pressures.

The council's own evidence base corroborates the independent market assessment in Section 6 of this report. The 2015 ELR provides a review of the employment land at the Wrexham Industrial Estate. The 2015 report forecasted that the remaining supply would be taken up between 2016 and 2018. (In actuality it was taken up the same year the report was written.) The 2015 report concludes that the long term supply of viable land at Wrexham Industrial Estate is likely to be comparatively small. The report states that 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. It also states that property market stakeholders say the quality and amount of stock in Wrexham Industrial Estate is very low because there has been very limited new development or investment. The report concludes that the Wrexham Industrial Estate has an undersupply of property options. The report says that the lack of range and choice of sites was deterring businesses from locating at the Industrial Estate.

Through the different means of addressing TAN 23 and through the property market assessment in this report it is well-evidenced that The Oaks is amongst the best sites in WBC to address the acute shortage of employment premises.

1.1.1. Introduction

1.2. Report Context

1.2.1. Cefn Park Developments (CPD) is seeking permission for a development proposal on land located at Wrexham Industrial Estate in the jurisdiction of Wrexham County Borough Council (WBC). The Oaks is a brownfield site that had an historic munitions/ordnance use but is now scrubland. The proposed development currently falls within the Settlement Limit as set out in Wrexham the 2005 Unitary Development Plan (UPD).

1.2.2. Since 2013 Wrexham County Borough Council (WBC) has been progressing its draft Local Development Plan (LDP). The Examination in Public (EiP) for the draft LDP took place in 2019 and whilst there are still some outstanding issues to resolved with The Planning Inspectorate it is likely that it will be adopted in the autumn of 2021. The latest iteration of the draft LDP would alter the boundary of Wrexham Industrial Estate Settlement Limit so that The Oaks would no longer be included be designated for employment use. WBC proposes in Policy NE2 that The Oaks be designated a Locally Designated Site of Nature Conservation and Geological Importance and through Policy SP10 that The Oaks be part of Wrexham's Industrial Estate Ecological Network.

1.2.3. CPD submitted an outline planning application in November 2019 which was refused in October 2020 based on four reasons summarised as: (1) the boundary of the development proposal was inconsistent with local plan settlement boundary; (2) the loss of trees; (3) lack of suitable ecological management plan; and (4) impact on wildlife.

1.2.4. CPD is now submitting a new outline planning application. The proposed development has been modified to address the objections set out in the officers report for the previous application. The new application is for about 22,000sqm of E(g)iii and B8 employment floorspace. The latest proposed development addresses the first three reasons for refusal in the officers report by reducing the developable area and building footprints; and enhancing the site's ecological and heritage assets. The purpose of this report is to address employment issues that are linked to the fourth reason for refusal: impact on wildlife.

1.2.5. The officers report for the refused November 2019 planning application refers to the Wales Technical Advice Note (TAN) 23: Economic Development (2014) and which states: *'where a planning authority is considering a planning application that could cause harm to the environment, it will be necessary to assess whether there are any 1) alternatives to the proposal, 2) the number of jobs accommodated on the site and 3) whether the development would make any special contribution to policy objectives.'*

1.2.6. This report addresses each of the three relevant points set out in the TAN 23 through the assessments within.

1.3. Purpose

1.3.1. The purpose of this report is firstly to address the three issues raised by TAN 23 set out in paragraph 1.1.5 above. Whilst addressing these issues, the report also demonstrates that The Oaks is a commercially attractive and important potential site for industrial activities.

1.4. Methodology and Report Structure

- 1.4.1. The methodology in this report comprises a review of the policy context, an assessment of property market evidence, a comparison of the subject against other existing and potential employment sites, and an economic assessment of the development proposal to identify the amount of employment that would be generated. These methods are all deployed to address the issues raised in TAN 23.
- 1.4.2. The structure of the report follows the methodology set out above. The report first presents the subject site, its planning policy context, and key evidence base documents.
- 1.4.3. It then identifies the relevant property market area which forms the geographic basis for analysis of the property market dynamics. The following section assesses the PMA's property market dynamics for two property sectors: light industrial premises (E(g)iii) and general industrial/warehouse & storage (B2/B8).
- 1.4.4. The report then presents an estimate of the employment benefits of the development proposal.
- 1.4.5. The subject site is then compared against alternative existing and potential employment sites for industrial development in WBC to demonstrate that the subject site is amongst the best available sites for the development and would provide much needed industrial premises.
- 1.4.6. The structure of the report is as follows:
- Section 2 – Site and Proposed Use
 - Section 3 – Planning Policy Context
 - Section 4 – Review of Employment Evidence Base Documents
 - Section 5 – Property Market Areas
 - Section 6 – Market Analysis of Industrial Premises
 - Section 7 – Employment Benefits
 - Section 8 – Site Appraisals

2. Site Context and Proposed Development

2.1. Introduction

2.1.1. This section presents both the current site context and then the proposed development.

2.2. The Site Context

2.2.1. The Oaks is owned by Cefn Park Developments (CPD). It is about 22.2 ha of brownfield land currently located within the Settlement Limit of the Wrexham Industrial Estate. It is located approximately 6 km east of Wrexham Town Centre. The site is bound by Oak Road to the north, industrial premises to the west and east, and brownfield land owned by CPD to the south.

2.2.2. The Oaks has an historic munitions/ordnance use but is now scrubland with some ecological assets. There are several buildings which remain on the site which are linked to its historic use.

2.2.3. In 2000, an outline planning application (P/2000/0019) was granted planning permission on 12.1 ha of the site for industrial development. This application has now expired.

2.3. Proposed Development

2.3.1. **Table 2.1** sets out the different uses within the proposed development. An indicative site plan for the proposed development at The Oaks is presented in **Figure 2.1**. This is comprised of four mid-sized industrial buildings of between 4,000 sqm (~43,000 sqft) and 5,000 sqm (~54,000 sqft).

2.3.2. Within the 22.2 ha site about 5.9ha are for the development of industrial premises. The remaining 16.7ha is for ecology, heritage and amenity.

Table 2.1 Proposed Development

Site	Size/Use
Employment area	5.9 ha
Mitigation area (ecology, heritage, amenity)	16.3 ha
Indicative gross floor area (GFA)	17,100 sqm
Indicative proposed employment uses	E(g)iii and B8

Source: CPD (2021)

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 2.1 Site Plan for Proposed Development



Source: Land Studio (2021)

3. Planning Policy Context

3.1. Introduction and Summary

- 3.1.1. This section covers the relevant national and local planning policy. On the national level the relevant policy for this report is the Technical Advice Note (TAN 23). TAN 23 provides the framework for the assessment in this report by setting out the basis for assessing three considerations around competing sites, job creation and WBC's policy objectives.
- 3.1.2. On the local level the existing Unitary Development Plan (2005) sets the context for development within the Wrexham Industrial Estate Settlement Limit. Within the boundary employment development is generally acceptable if adequate landscaping is provided to protect and/or enhance the visual quality of the urban fringe. The Oaks is located within the Settlement Limit.
- 3.1.3. The draft Wrexham Local Development Plan 2013-2028 (LDP) alters the Settlement Limit for the Wrexham Industrial Estate which removes The Oaks from being located within the development area. As a result the site would be designated a Locally Designated Site of Nature Conservation and Geological Importance.
- 3.1.4. There are a range of UDP policies whose objectives would be met by delivering The Oaks for employment development. This includes strategic policies PS1, PS3 and PS6. There are also draft LDP policies whose objectives would also be met through delivery of The Oaks. This includes SP9 and SP10.

3.2. National Planning Policy

Technical Advice Note (TAN) 23: Economic Development (2014)

- 3.2.1. Technical Advice Notes are produced on the national level and provide detailed planning advice. Local planning authorities take them into account when preparing their development plans. The officers report for The Oaks' refused 2019 planning application refers to TAN 23 and states that the tests within should be applied.
- 3.2.2. TAN 23 states in paragraph 2.1.5 that:

'Where a planning authority is considering a site allocation or planning application that could cause harm to the environment or social cohesion, it should ask three questions in order to help clarity and balance the economic, social and environmental issues.'

- 3.2.3. The three questions are set out in other paragraphs:

Alternatives: If the land is not made available (the site is not allocated, or the application is refused), is it likely that the demand could be met on a site where development would cause less harm, and if so where? (paragraph 2.1.6)

How many direct jobs will be based at the site? (paragraph 2.1.9)

Would the development make any special contribution to policy objectives? (paragraph 2.1.11)

3.3. Local Planning Policy

Wrexham Unitary Development Plan 1996-2011 (UDP)

- 3.3.1. WBC adopted the UDP in 2005. The element of The Oaks proposed for employment premises is entirely within the Settlement Limit of the Wrexham Industrial Estate. The Settlement Limit is shown in **Figure 3.1** below. The Oaks is identified by a redline boundary.
- 3.3.2. There are two key relevant Strategic Policies:
- 3.3.3. **Policy PS1** states: 'New development for housing, employment, and community services will be directed to within defined settlement limits/employment areas.'
- 3.3.4. **Policy PS3** states: 'Development should use previously developed brownfield land comprising vacant, derelict or underused land in preference to the use of greenfield land, wherever possible...'
- 3.3.5. **Policy PS6** states: 'Approximately 300 hectares of employment land will be made available for development between 1996 and 2011.'
- 3.3.6. Development of The Oaks would help WBC achieve the objectives in the three strategic policies.

Policy E1 Employment Allocations

- 3.3.7. Policy E1 seeks to identify sufficient land to meet the future new employment requirements of WBC for the period 1996 to 2011 on the basis of 20 hectares of land per annum. This is below the peak rate of employment land delivery of the late 1980s but is above the rate for the early 1990's and therefore allows for a future upturn in the rate of development given the need to enhance local job opportunities and to diversify the local economy.
- 3.3.8. Section 4 of this report shows that WBC did not achieve its delivery target. Between 1996 and 2001 about 5.6 hectares of land were delivered per annum. This is about 28% of WBC's UDP target.

Policy E4 Employment development (of unannotated land) within Settlements

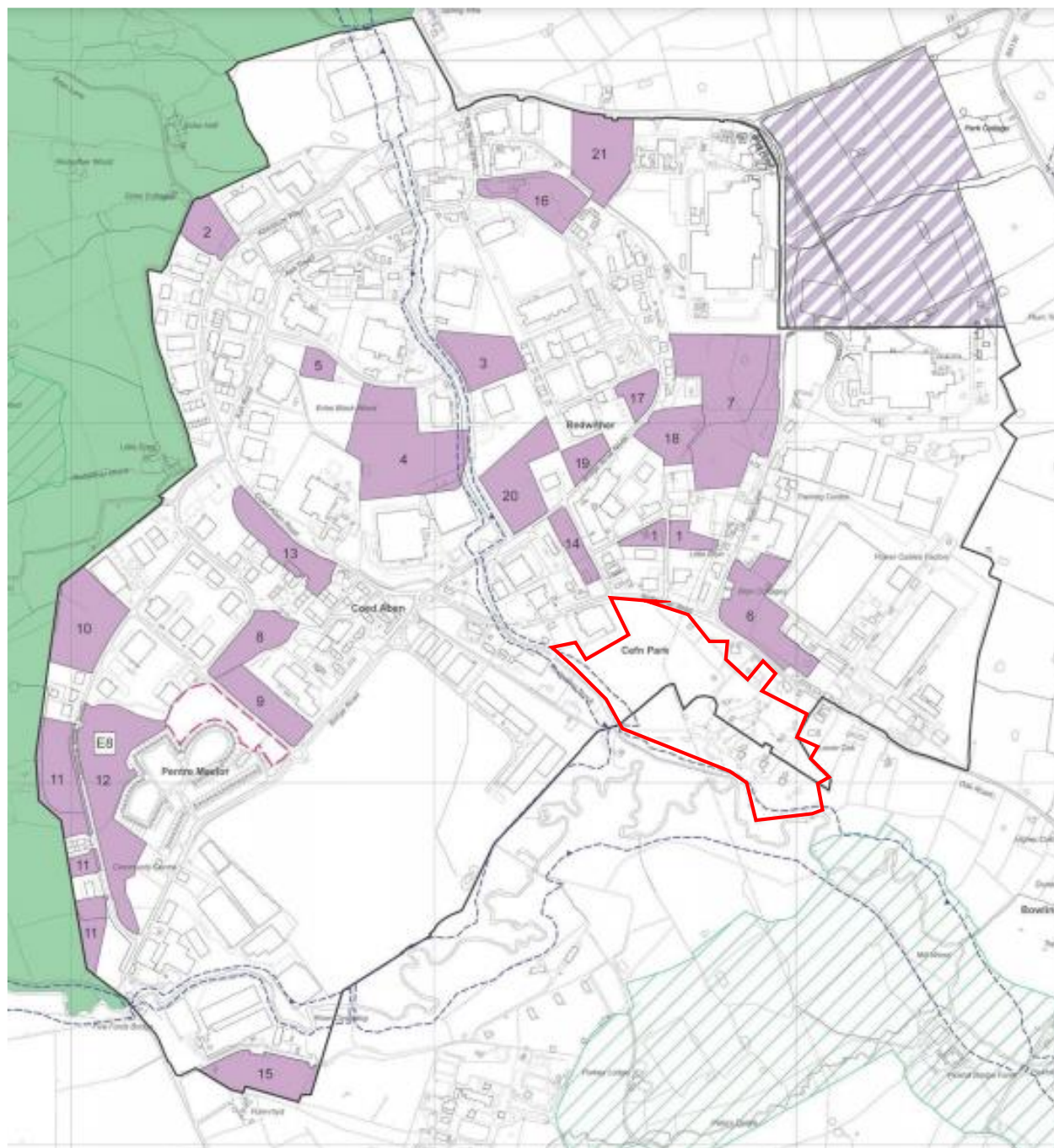
- 3.3.9. The policy states that 'Employment development on unannotated land within settlement limits will be permitted subject to Policy GDP1'.
- 3.3.10. The Oaks falls within the category of unannotated land within a settlement limit. Policy GDP1 sets out development objectives and the Proposed Development is considered to meet those objectives. The policy supports employment development within Settlement Limits as long as it does not prejudice existing amenities through noise, vibration, smell, safety, health or excessive traffic generation. Acceptable development within settlement limits must, provide adequate landscaping in order to protect and/or enhance the visual quality of the urban fringe.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 3.1 Wrexham Industrial Estate with UDP Settlement Limit Boundary and The Oaks



Source: Wrexham County Borough Council

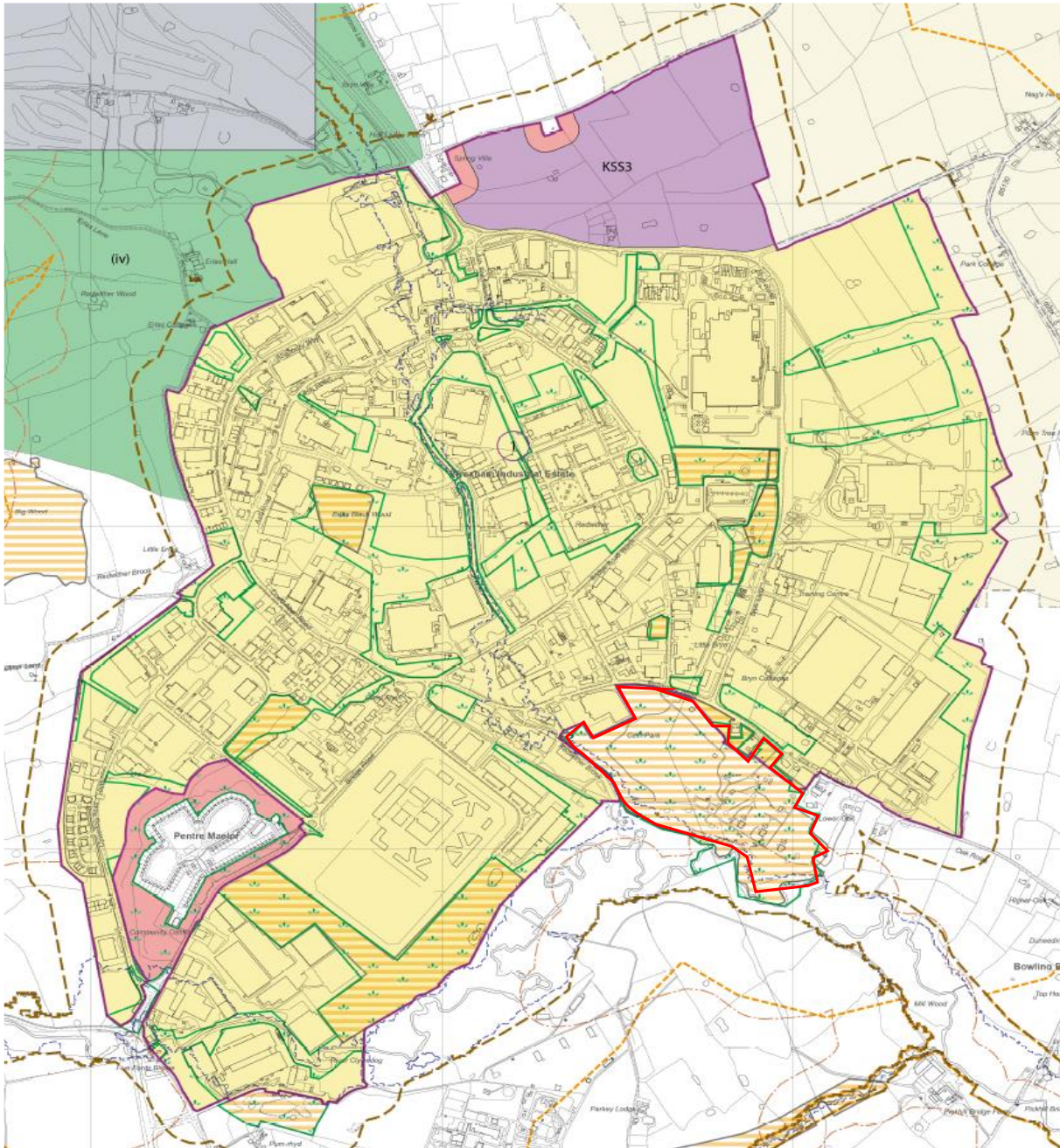
Draft Wrexham Local Development Plan 2013-2028 (LDP)

- 3.3.11. WBC are preparing a revised local plan known as the Wrexham Local Development Plan (LDP). Once adopted, the LDP would replace the UDP. In 2018 the LDP was submitted to the Government for examination. The hearings were held in 2019.

Policy SP2: Location of Development

- 3.3.12. Policy PS2 states that new development is directed to the defined Settlement Limits and employment areas identified on the proposals map. The plan directs new development to the Wrexham Industrial Estate (policy SP10). The policy states that the justification for directing development to the Wrexham Industrial Estate is that it makes the best use of existing infrastructure and services and facilitates the creation of jobs.
- 3.3.13. The policy proposes a single new employment allocation on greenfield land on the edge of Wrexham Industrial Estate. This is called the KSS employment allocation (28ha).
- 3.3.14. The proposed change of the Settlement Limit would sterilise The Oaks for development of employment premises. **Figure 3.2** shows that The Oaks would be located outside the Settlement Limit of the Wrexham Industrial Estate. The Oaks is proposed to be designated Locally Designated Site of Nature Conservation and Geological Importance. Through Policy SP10 The Oaks would form part of Wrexham's Industrial Estate Ecological Network and therefore be located outside of the Settlement Limit.

Figure 3.2 Wrexham Industrial Estate Proposed Boundary



Source: WBC Deposit Plan Written Statement 2018

Policy SP9: Economic Growth Employment and Enterprise

- 3.3.15. The policy aims to ensure the continued role of the WBC as a key driver of economic growth in North Wales and the wider region. It mentions that allocation of a 28ha strategic expansion site within the Wrexham Industrial Estate. (This is KSS: Land to the north of Bryn Lane which is covered in Policy SP11.)

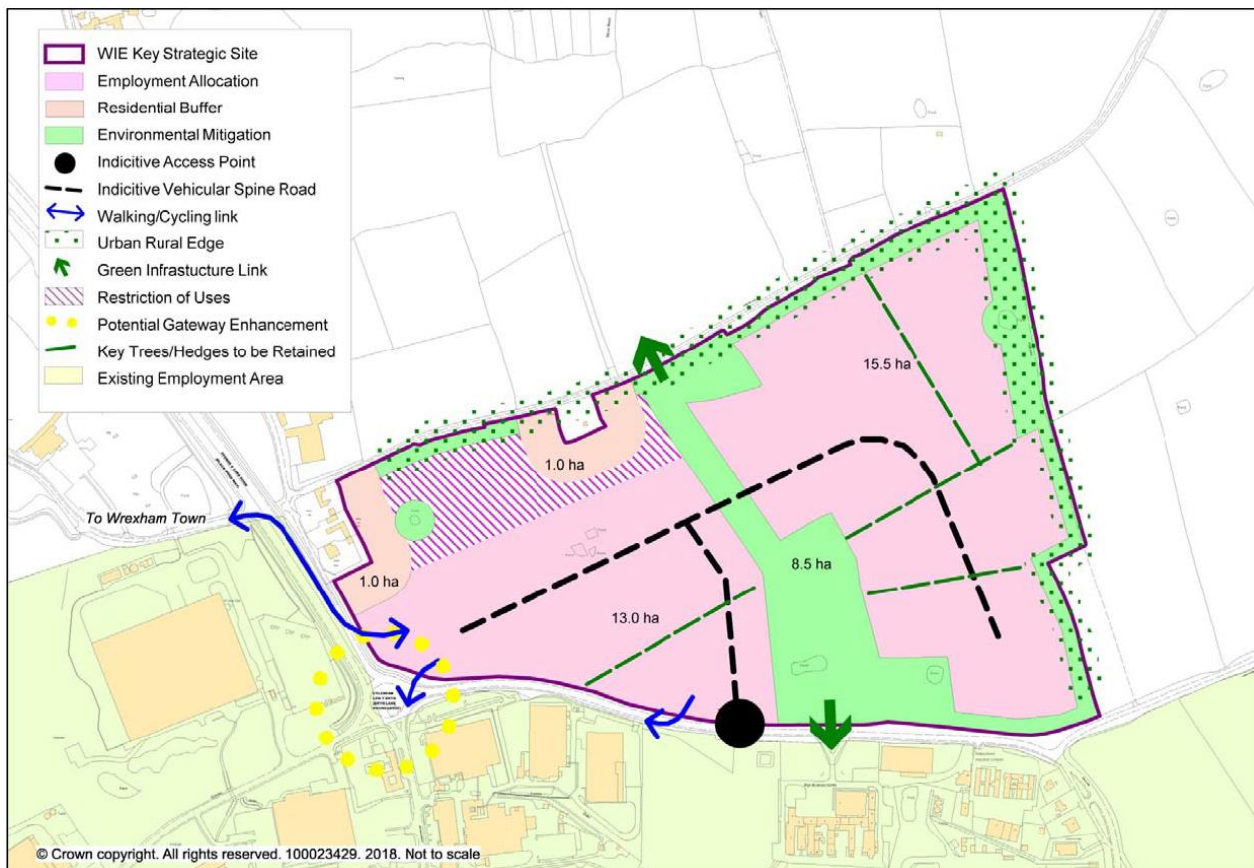
Policy SP10: Wrexham Industrial Estate

- 3.3.16. The purpose of the policy is to emphasise the importance of the estate and to ensure that it continues to provide a diverse set of employment sites to support the economy. Wrexham Industrial Estate is WBC's Key Business Sector Area and will continue to be the primary focus for new employment development over the plan period for employment premises.

Policy SP11: KSS3: Land to the North of Bryn Lane, Wrexham Industrial Estate

- 3.3.17. The purpose of the policy is to set out the basis of WBC's single new employment land allocation. It is a large greenfield site on the edge of the estate. It is shown in **Figure 3.3**. The policy notes the growing land supply shortfall relative to demand on the estate.

Figure 3.3 KSS Employment Allocation



Source: WBC Deposit Plan Written Statement 2018

4. Review of Relevant Evidence Base Documents

4.1. Introduction and Summary

- 4.1.1. This section reviews the key evidence base documents from WBC that cover supply-demand dynamics of employment premises.
- 4.1.2. The 2015 Employment Land Review Wrexham County Borough Council and Flintshire County Council (ELR) is the main evidence base document which calculates the employment land need for Wrexham up until 2030. The report provides three estimates of employment land need. They are based on employment growth forecasts and the historic take-up of employment land. Whilst the ELR suggests that WBC has sufficient employment land to meet its requirements, evidence shows that the council's allocations are not being delivered at a rate that is meeting existing and anticipated demand. This suggests that many of the allocations are not commercially attractive to developers and occupiers.
- 4.1.3. The report highlights the land supply shortfall at the Wrexham Industrial Estate. The report cautions that any remaining supply at the time was likely to be taken up quickly. This is the case since the current rate of availability on the estate is 2.1% and there has been an acute shortage of premises since 2015 (as shown in Section 5). The report also states that the supply of viable land at the estate is likely to be small which is why many of the allocated sites have not been delivered. It also says there is a shortage of readily available land to attract inward investors and occupiers. This acute shortage has been curtailing economic deterring businesses from locating on the estate and thereby curtailing economic growth.
- 4.1.4. The report states that a vacancy rate of between 7% and 10% provides occupiers with sufficient choice and that the Wrexham Industrial Estate has an undersupply and that new stock is urgently needed.
- 4.1.5. The report also states that property market stakeholders say the quality and amount of stock is very low because there has been very limited new development or investment.
- 4.1.6. The report says that agents cite the need for sites of between 2ha and 4.5ha to meet the needs of inward investors and large local firms looking to growth as well as for small businesses. The Oaks is well-positioned to meet this demand.
- 4.1.7. The 2019 Employment Land Availability Monitoring Report (ELAM) provides an update of WBC's existing supply and demand position. It highlights the extremely low level of employment land delivery in WBC which is currently causing an acute shortage of available employment premises. Whilst the target during the UDP plan period was the delivery of 20ha of employment land between 1996 and 2011, WBC achieved only 30% of the target.
- 4.1.8. Whilst the 2015 ELR has new target for the delivery of employment land, it ignores the historic under-provision of employment land which is the basis for today's acute shortage of employment floorspace. If this under-provision were taken into account the employment land need would be far higher.

4.2. Wrexham Local Authority Employment Evidence Base

2015 Employment Land Review WBC and Flintshire County Council (ELR)

- 4.2.1. This report assesses the supply, demand and net requirements for employment land and premises in the local authority areas of WBC and Flintshire County Council (FCC). It covers the period to 2030.
- 4.2.2. The ELR identified a baseline employment land supply in Wrexham of about 205ha of available employment land comprising 44 sites.
- 4.2.3. When exclusions are applied for land which is already developed; land with significant constraints; land being held for the expansion of individual firms; land that is proposed for alternative uses; and land which has identified ecological issues then the net land supply in WBC reduces to about 80.5ha. The high level of exclusions suggest that WBC has, in numerous cases, allocated employment land that is not commercially attractive to the market. Many of the sites were allocated in 2005 in the UDP but have still not been delivered.
- 4.2.4. The ELR uses two methods (and three scenarios) to calculate employment land demand. The first method uses two scenarios. The low employment growth scenario which shows a negative land requirement of -5.4ha. The high growth scenario shows a land requirement of about 35ha. The second method is based on the average 10-year take up rate of employment land between 2003 and 2013. This projects a higher growth requirement of 66 ha.
- 4.2.5. All three scenarios and the net employment land position are presented in **Table 4.1**. In all three scenarios there is a surplus of employment land of between about 14ha and 84ha until 2030.

Table 4.1 WBC Balance of Employment Land Allocations and Need

Model	Existing Land Stock (2014) Ha	Employment Land Need 2013-2030	Surplus	Assumptions
Baseline (Low Growth) Requirement	80.5	-5.44	84.49	Net requirement based on projected growth / reduction of employment in industry sectors
High Growth Requirement	80.5	35.13	44.92	Based on projected growth of employment in industry sectors
Long term land take up	80.5	66.30	13.75	At an average take up rate of 3.9ha/year

Source: Employment Land Review WBC and Flintshire County Council Land Review (2015)

- 4.2.6. The report provides a review of the employment land status of the Wrexham Industrial Estate and assesses employment land dynamics within the estate. The report notes that whilst WBC as a whole has sufficient land to meet its needs, there is a growing land supply shortfall at the Wrexham Industrial Estate.
- 4.2.7. While Wrexham Industrial Estate has a gross baseline supply of about 141ha, 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 about 56ha.

- 4.2.8. Based on current planning consents and identified development plans, the report says that up to 90% of the remaining supply could be taken up over the next three years. The report concludes that therefore the long term supply of viable land at Wrexham Industrial Estate is likely to be comparatively small.
- 4.2.9. The report also concludes that due to site changes and/or planning consents as well as land being 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.
- 4.2.10. The report also states that property market stakeholders say the quality and amount of stock is very low because there has been very limited new development or investment. New stock is urgently needed.
- 4.2.11. The report states that the Wrexham Industrial Estate had a vacancy rate of about 5%. It assumes that a vacancy rate of between 7% and 10% provides occupiers with sufficient choice of premises types, locations, sizes and tenures and therefore concludes that the Wrexham Industrial Estate has an undersupply of property options at this time. The report says that the lack of supply, relative to demand, could incentivise local developers to deliver new units in the short and medium term.
- 4.2.12. The report says that the lack of range and choice of sites was deterring businesses from locating at the Industrial Estate. The report also points out that the development of the prison (HMP Berwyn) is likely to boost demand for premises at Wrexham Industrial Estate as supply chain and affiliated companies seek to locate close to the facility.
- 4.2.13. The report says that agents, developers, and WBC officers who market the estate report good demand for land and premises. Particular requirements are:
- Sites of 2.0 to 4.5ha to meet the needs of inward investors and large local firms looking to grow;
 - Small businesses looking for 0.4ha plots which could provide design and build options for owner occupation; and
 - Industrial units of 929 to 1,858 sqm along with small al sub-500 sqm requirements.
- 4.2.14. The report concludes its assessment of the estate by saying that there is a need to allocated further land at the estate to meet the needs of existing firms and future inward investors.
- 4.2.15. The report presents a review of the subject site and notes that the site was previously considered suitable for B1/B2/B8 development. The report characterises the site as undevelopable due to ecological constraints. (However these are dealt with through the new planning application.)

Wrexham Employment Land Availability and Monitoring Report (ELAM) 2019

- 4.2.16. WBC produce an annual ELAM report which tracks the delivery of employment land and ensures there is robust evidence to inform allocations and policies on employment land provision.
- 4.2.17. **Figure 4.1** shows historic delivery of employment land in WBC. The rate of employment land delivery over the past decade has been low. **Table 4.2** shows that the rate of delivery steadily declined over the decades.

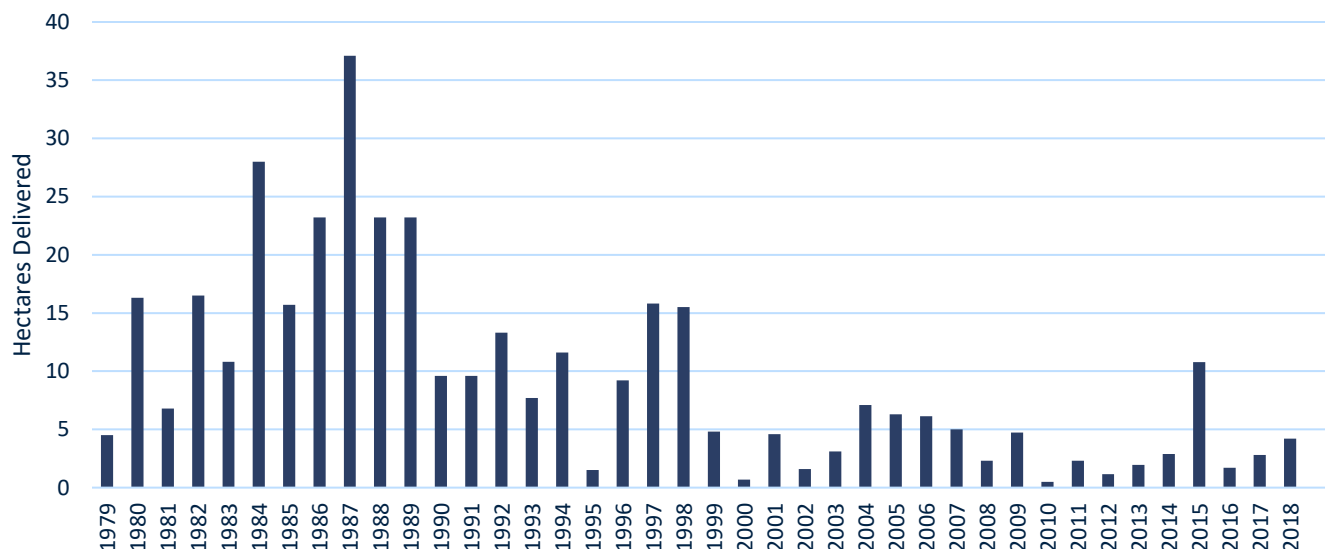
Employment Market Study

The Oaks, Cefn Park, Wrexham



The rate of delivery between 2010 and 2018 was just 3.1ha per annum which is a rate that is too slow to meet employment land requirements.

Figure 4.1 WBC Employment Land Delivery (1979-2018)



Source: Wrexham Employment Monitoring Report (2019) & Savills Analysis

Table 4.2 Wrexham Borough Council Industrial Land Deliveries (1980-2018)

Period	Hectares	Average Annual Delivery (ha)
1980 - 1989	201	20.1
1990 - 1999	99	9.9
2000 - 2009	42	4.2
2010 - 2018	28	3.1

Source: Wrexham Employment Monitoring Report (2019)

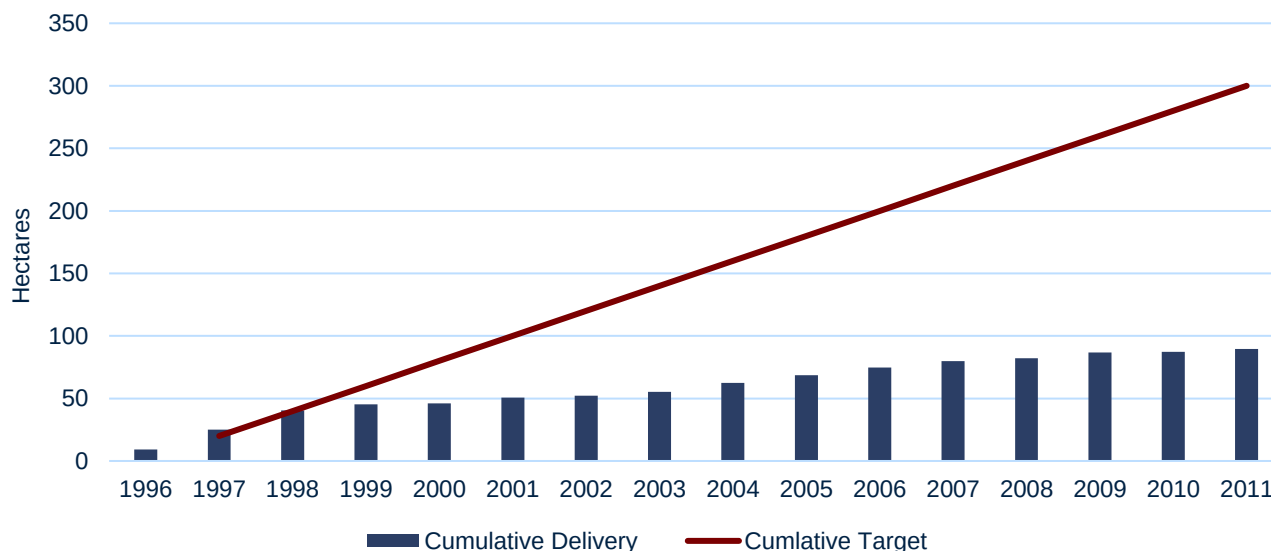
- 4.2.18. **Figure 4.2** shows that historically the amount of employment land delivered by WBC was grossly insufficient to meet the identified need. Policy E1 of the UDP has a target to deliver 20 hectares of employment land per annum between 1996 and 2011. **Figure 4.2** shows that the cumulative employment land requirement over the plan period was 300ha but only about 90ha was delivered. This left a shortfall of over 200ha over the plan period. WBC achieved only about 30% of its target.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 4.2 WBC UDP Employment Land Target and Actual Delivery (1996-2011)



Source: Wrexham Employment Monitoring Report (2019) & Savills Analysis (2021)

4.2.19. **Table 4.3** presents an estimate of WBC's employment land delivery performance during the period of the draft LDP which covers 2014 to 2030. According to the ELAM about 22ha have been delivered since 2014. For WBC to deliver a sufficient amount of employment land to meet the requirements of the highest employment land requirement set out in the ELR, it needs to ensure that about 3.7ha are delivered per annum. The ELAM shows that in most years WBC is not achieving this level of delivery. Also, the employment land targets from the 2015 ELR ignore the historic under-provision of employment land during the 1996 to 2011 plan period of the UDP.

Table 4.3 Current Employment Land Status

Model	Employment Land Need (2013-2030)	Employment Land Delivery (2014-2018)	Additional Employment Land Required Target	Required Rate of Employment Land Delivery Per Annum (2019-2030)
Baseline (Low Growth) Requirement	-5.44	22.38	Not applicable	Not applicable
High Growth Requirement	35.13	22.38	12.75	1.06
Long term land take up	66.30	22.38	43.92	3.66

Source: 2015 ELR; 2019 ELAM; Savills Analysis (2021)

5. Property Market Areas

5.1. Introduction

5.1.1. This section presents the property market areas (PMAs) that are used as the geographic basis for the property market assessments. The Wider PMA is a geographic area that provides a high-level view of functional property market area within which the site is located. The other PMAs comprise the administrative area of WBC and the Wrexham Industrial Estate.

5.1.2. PMAs can be thought of as areas of search within which occupiers would consider taking up premises that suit its operational requirements. PMAs are akin to the functional economic market areas (FEMA) which is a concept applied in planning. A FEMA is an area within which a local economy retains some level of functional self-containment or cohesiveness. A PMA is similar in this regard to a FEMA but focussed on the property sector.

5.2. Wider PMA

5.2.1. The purpose of the Wider PMA is to provide a high level perspective on market performance in the wider area around the subject site. **Figure 5.1** presents the map of the Wider PMA with The Oaks' location identified by a dot.

5.2.2. The area is largely defined by the strategic road network and key conurbations. Access to an efficient strategic road network (SRN) is paramount for industrial and logistics sites. The northern part of the Wider PMA includes Chester and the SRN leading from Wrexham to the Wider PMA's northern boundary. The southern part of the Wider PMA includes Shrewsbury and the strategic roads between Wrexham and the southern boundary including the A5.

5.2.3. The Wider PMA does not include Ellesmere Port to the north because occupiers in that location benefit from access to the River Mersey and relative proximity to Liverpool and Manchester. This is less likely to be a consideration for occupiers in WBC.

5.2.4. The Wider PMA also does not include Telford, Stoke-on-Trent or Crewe which all have reasonably good access to the motorway network. Employment premises in these locations can play a role in regional or national warehouse and distribution networks. Occupiers in WBC are less likely to be oriented towards regional or national markets.

Figure 5.1 Wider Property Market Area



Source: CoStar; Savills (2021)

5.3. WBC PMA

- 5.3.1. The purpose of the WBC PMA is to provide analysis that can be used to assess property market dynamics alongside the findings in WBC's own evidence base. The Local PMA is a clearly delineated area and is presented in **Figure 5.2**.

Figure 5.2 WBC PMA



Source: CoStar; Savills (2021)

5.4. Wrexham Industrial Estate

- 5.4.1. **Figure 5.3** presents the Wrexham industrial Estate. In the property market analysis section of this report there are instances where the property market dynamics of the estate are presented for the purpose of comparison with the other areas of analysis.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 5.2 WBC PMA



Source: CoStar; Savills (2021)

6. Analysis of Industrial Market

6.1. Introduction and Summary

- 6.1.1. This section covers the property market dynamics for the industrial and light industrial sectors. The supply-demand dynamics are assessed, then estimates of future demand are calculated, and then the supply-demand balance is presented.
- 6.1.2. The supply situation in WBC and Wrexham Industrial Estate shows an acute shortage of premises. Overall rates of availability are 2.0% and 2.1% respectively. The low level of availability has plagued these locations since 2014. Since then, the markets have exhibited supply-constrained conditions which continues to hold back economic growth in WBC.
- 6.1.3. Inventory in WBC is dominated by large premises over 100,000 sqft which comprises about 67% of total floorspace. There is a need for small and mid-sized premises which is what could be delivered at The Oaks. Nearly all the premises (both occupied and available) is of average or below average quality. There are no premises in WBC that meet the requirements of modern occupiers. These are issues that are identified in the council's own evidence base.
- 6.1.4. Deliveries of new industrial and light industrial premises in the WBC have averaged about 43,000 sqft per annum. This is roughly equivalent to 1ha per annum. This is an insufficient level of delivery to ensure that WBC's inventory is regularly replenished. It is generally accepted that property markets require an 8% vacancy rate to provide a suitable amount of available options so that the market can operate efficiently. (The 2015 ELR refers to a rate of between 7% and 10% as appropriate to ensure the market operates efficiently.) WBC currently requires close to 1 million sqft of vacant floorspace to achieve an 8% level of availability. However there is only about 250,000 sqft currently available.
- 6.1.5. Regarding demand, annual net absorption has been low over the historic series. This is primarily due to the supply-constrained character of the WBC PMA and the Wrexham industrial Estate in particular. The rate of availability has been continuously about 2% or less since 2014. Without suitable available premises occupiers are unable to take-up premises.
- 6.1.6. In spite of the low level of take-up, floorspace requirements are distributed across the size categories with healthy demand for small, mid-sized and large premises. The greatest level of demand has been for logistics but there is also strong demand for mid-sized premises for manufacturing.
- 6.1.7. Demand forecasts based on either trend growth (which reflects supply-constrained conditions) or a less-constrained scenario both show strong levels of demand that are unable to be met in WBC given the acute shortage of premises. But even the more bullish demand forecast is likely to underestimate the true underlying level of demand as a result of the expansion of the logistics activities resulting from the pandemic.
- 6.1.8. The supply-demand balance based on trend growth in net absorption shows that there is less than half a year's supply of floorspace to meet demand. This result points to a local economy that is unable to respond to current and future economic opportunities. There is a dire need for new premises now.

6.2. Supply of Industrial and Light Industrial Premises

6.2.1. **Table 6.1** presents the supply metrics for industrial and light industrial premises. The WBC PMA currently has a rate of availability of 2.0% which indicates that there is an acute shortage of industrial premises. This indicates that the market is highly constrained and that occupiers are being forced to seek premises outside of the area. This is constraining economic growth in the WBC area.

6.2.2. In spite of the acute shortage of supply, delivery in the WBC PMA has been extremely low. Since 2009 only about 515,000 sqft has been delivered which represents a delivery rate of just 0.4% of current inventory on a per annum basis. This is insufficient to ensure that premises which meet the requirements of modern occupiers is being delivered within WBC. It shows that the industrial sector is significantly supply constrained within Wrexham.

Table 6.1 Supply Metrics for Industrial Premises

	Inventory (sqft)	Available Floorspace (sqft)	Availability Rate	Total Deliveries (2009-2021) (sqft)	Market Rent (£ per sqft)
Wider PMA	31,544,401	1,430,540	4.5%	2,100,272	4.88
Industrial	29,072,590	1,204,901	4.1%	2,002,544	4.78
Light Industrial	2,471,811	225,639	9.1%	97,728	5.77
WBC PMA	12,403,139	248,741	2.0%	514,720	5.04
Industrial	12,058,512	155,820	1.3%	514,720	4.91
Light Industrial	344,627	92,921	27.0%	0	5.40
Wrexham Industrial Estate	7,915,590	171,882	2.1%	401,956	5.30
Industrial	7,681,295	90,032	1.2%	401,956	5.21
Light Industrial	234,295	81,850	34.9%	0	5.50

Source: CoStar (2019)

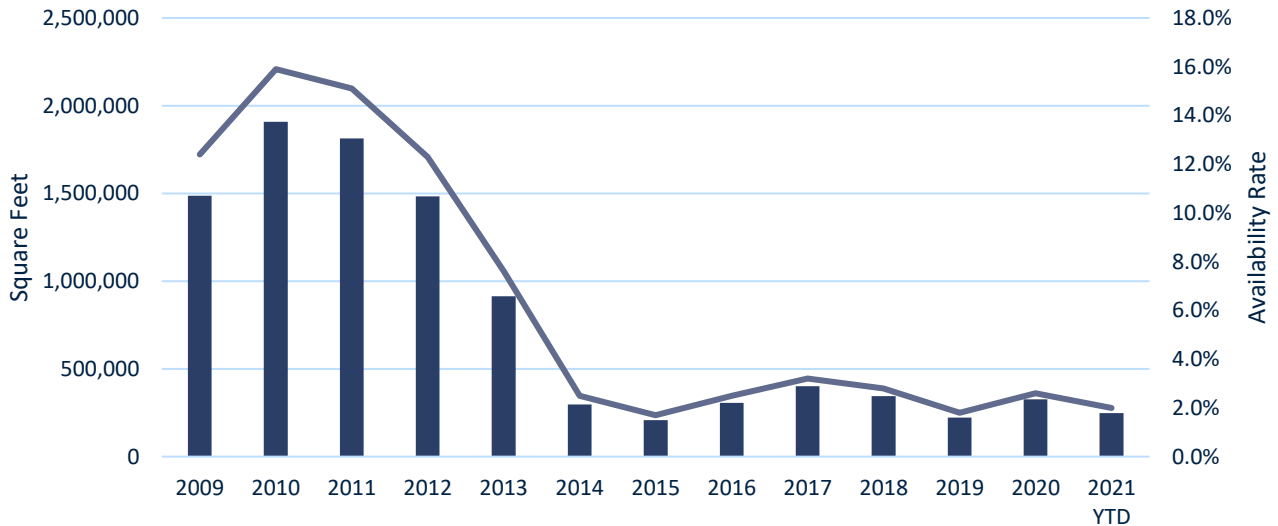
6.2.3. **Figure 6.2** and **6.3** present the supply of available premises over time by size category in the WBC PMA and in the Wrexham Industrial Estate. It shows the steep and steady decline in availability during the early part of the last decade. Since 2014 the rate of availability in WBC has remained at about 2%. In the Wrexham Industrial Estate the shortage is even more acute. The rate of availability has been below 1% for much of the past six years. Both areas are characterised by an acute and sustained shortage of industrial premises.

Employment Market Study

The Oaks, Cefn Park, Wrexham

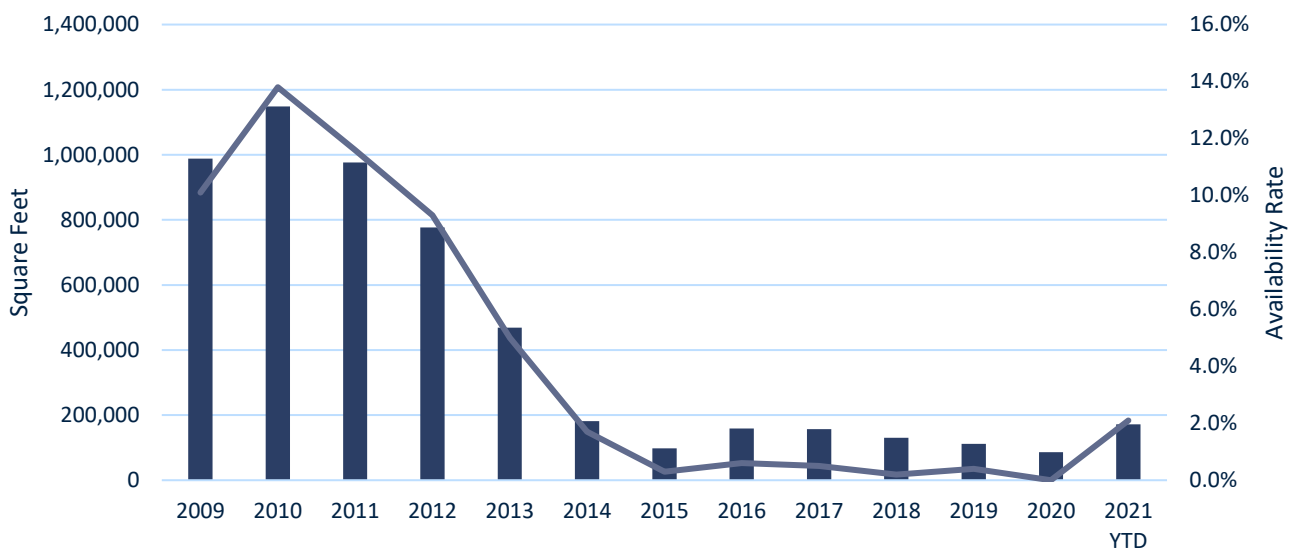


Figure 6.2 Availability of Industrial and Light Premises in WBC PMA



Source: CoStar (2021)

Figure 6.3 Availability of Industrial and Light Premises in Wrexham Industrial Estate

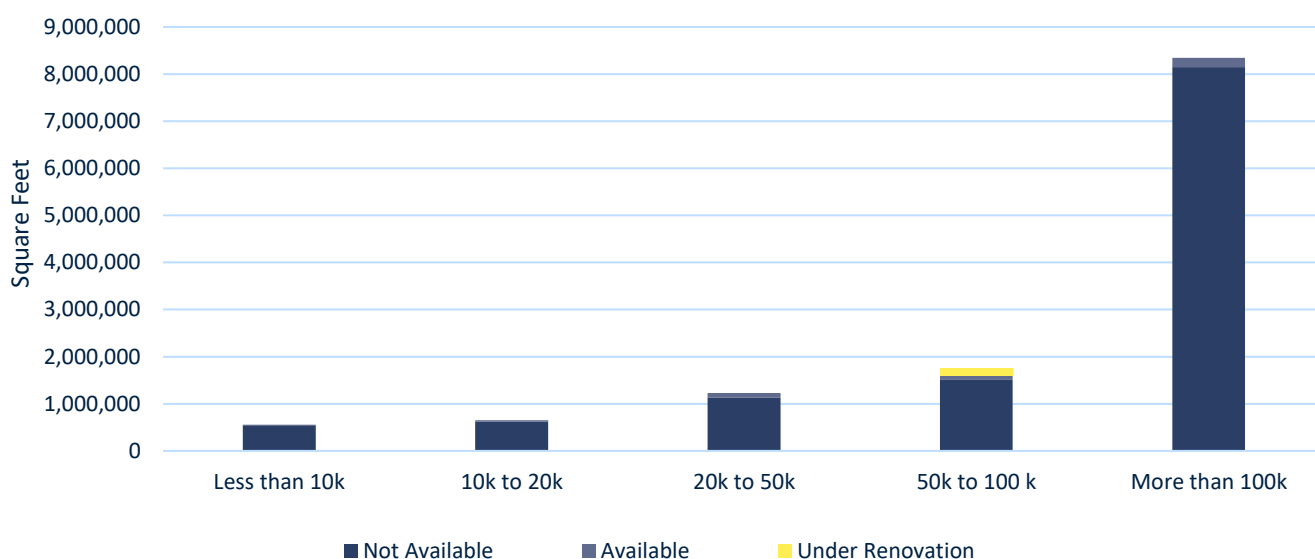


6.2.4. **Figure 6.4** presents the total supply of industrial premises by size category and availability of floorspace. It shows that the market is dominated by large sheds over 100,000 sqft which represents about 67% of total stock. Small and mid-sized premises represents a relatively small proportion of stock. Across all categories there is little available floorspace.

Figure 6.4 Inventory of Industrial & Light Industrial Premises by Size Category and Availability in WBC PMA

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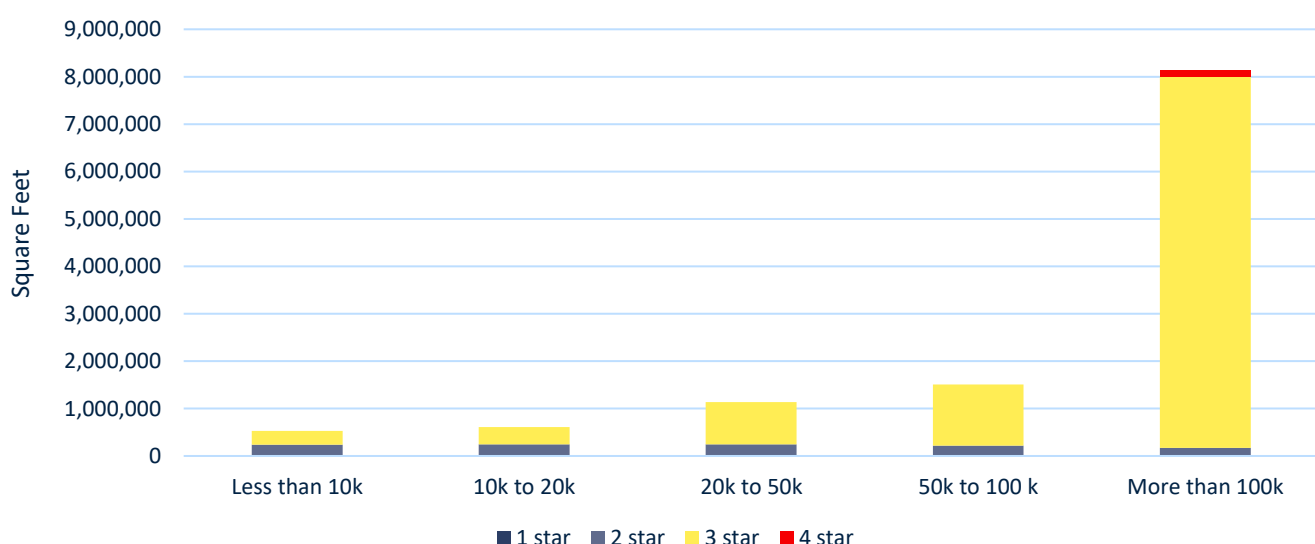
The Oaks, Cefn Park, Wrexham



Source: CoStar (2021)

6.2.5. **Figure 6.5** presents the stock of industrial premises by quality. It shows that virtually all the premises in WBC is of average or below-average quality (3 stars or less). There are no premises within WBC that is of above average quality (4 and 5 stars). This shows that there are virtually no premises (either occupied or available) that meet the needs of modern occupiers. The characteristics of the different quality ratings are set out in **Table 6.2**.

Figure 6.5 Inventory of Industrial and Light Industrial Floorspace by Size Category and Quality

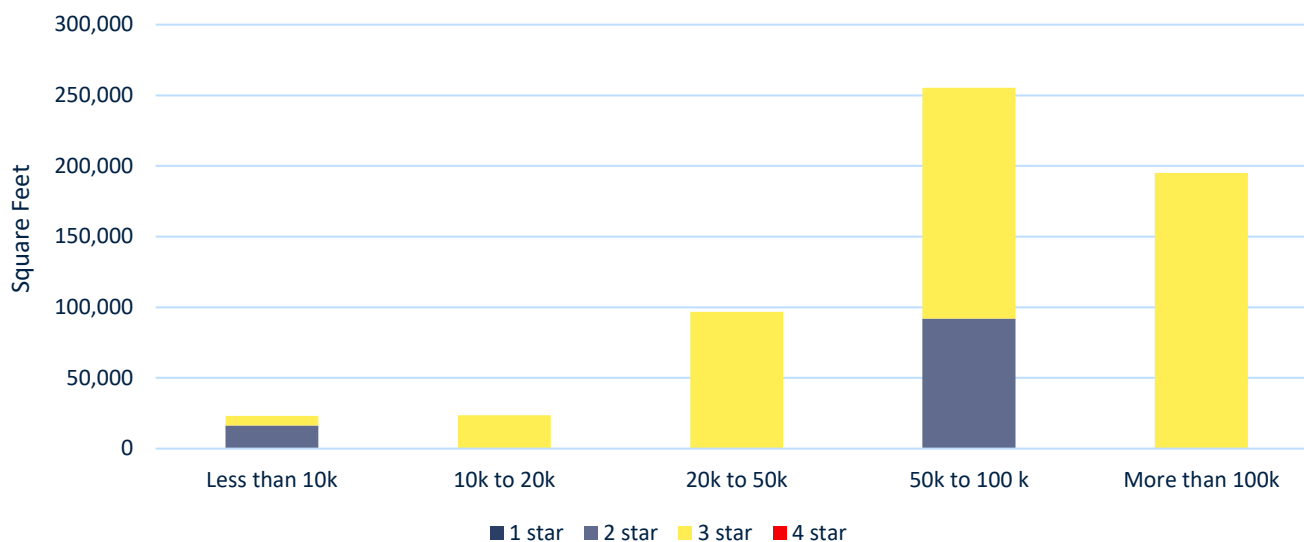


Source: CoStar (2021)

6.2.6. **Figure 6.6** presents the inventory of available industrial and light industrial floorspace by quality. It shows that of the limited floorspace that is available, it is of average or below average quality. There is no available

floorspace of above average quality.

Figure 6.6 Inventory of Available Industrial and Light Industrial Floorspace by Size Category and Quality



Source: CoStar (2021)

6.2.7. **Table 6.2** presents the characteristics of different star ratings used by CoStar.

Table 6.2 CoStar Quality Star Rating

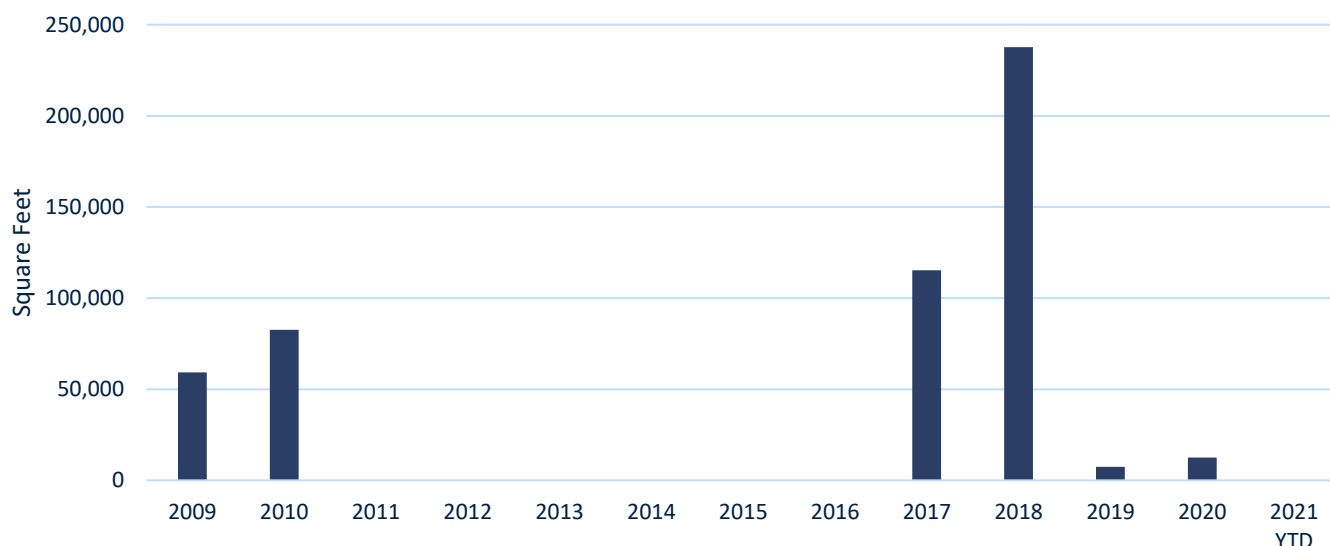
Stars	Quality Characteristics
* **	- In need of significant refurbishment or only suitable for smaller tenants. - Lowest rents in market.
***	- An older structure, but not refurbished. - Standard ceiling heights with less efficient floor plates. - Average or near average market rents
**** *****	- New or refurbished construction exhibiting the latest trends in office design. - Prominent in its context. - Sustainable and energy efficient. - High quality materials and systems. - Efficient floor plates and generous ceiling heights. - High glazing ratios for daylight and views. - Rents above market averages.

Source: CoStar, 2020

6.2.8. **Figure 6.7** presents historic delivery of floorspace in WBC. The average level of floorspace delivery in WBC

is about PMA is about 43,000 sqft per annum. (This is roughly equivalent to delivery of about 1ha per annum based on the assumption of a 0.4 site coverage ratio.) That is a floorspace delivery rate of about 0.3% of existing inventory per annum. This is an insufficient level of delivery to ensure that the stock is suitably replenished to meet the needs of the market.

Figure 6.7 Historic Delivery of Industrial and Light Industrial Premises in WBC PMA



Source: CoStar (2020)

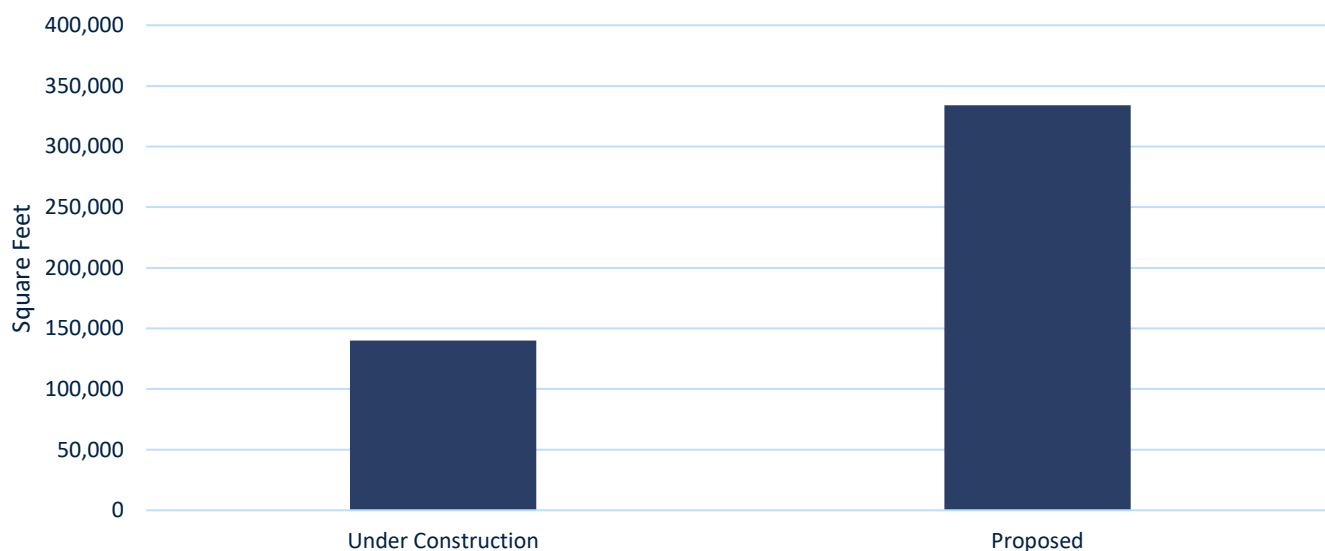
- 6.2.9. **Figure 6.8** presents the supply pipeline for WBC. There are currently around 140,000 sqft of premises under construction and about 300,000 sqft proposed. This is an insufficient level of availability to provide sufficient options for existing and prospective occupiers.
- 6.2.10. Property markets generally require an 8% vacancy rate to provide a suitable amount of available options so that the market can operate efficiently. (The 2015 ELR refers to a rate of between 7% and 10%.) Inventory in WBC is about 12.4m sqft which would mean that it requires about 990,000 sqft of vacant floorspace. However there is only about 250,000 sqft that is currently available. Whilst the pipeline would provide some potential new occupational options, it is insufficient to ensure the market operates efficiently.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 6.8 Supply Pipeline of Industrial Premises in WBC



Source: CoStar (2021)

6.3. Demand for Industrial and Light Industrial Premises

6.3.1. This section presents an assessment of demand for industrial and light industrial premises. It then presents future demand estimates based on historic performance by size and sector.

6.3.2. **Table 6.3** presents high-level demand metrics. Given the acute shortage of industrial premises in WBC and the Wider PMA as well, the level of net absorption as a percentage of total inventory is low. In the more recent years, as the amount of available floorspace has diminished, the level of take-up has been particularly low.

Table 6.3 Demand Metrics for Industrial Premises in the PMA

	Inventory (sqft)	Average Net Absorption Per Annum 2009-2021 (sqft)	Annual Net Absorption as % of Total Inventory	Market Rent (£ per sqft)
Wider PMA	31,544,401	252,664	0.8%	4.88
Industrial	29,072,590	250,202	0.9%	4.78
Light Industrial	2,471,811	2,462	0.1%	5.77
WBC PMA	12,403,139	84,484	0.7%	5.04
Industrial	12,058,512	91,139	0.8%	4.91
Light Industrial	344,627	-6,655	-1.9%	5.40
Wrexham Industrial Estate	7,915,590	55,379	0.7%	5.30

Employment Market Study

The Oaks, Cefn Park, Wrexham

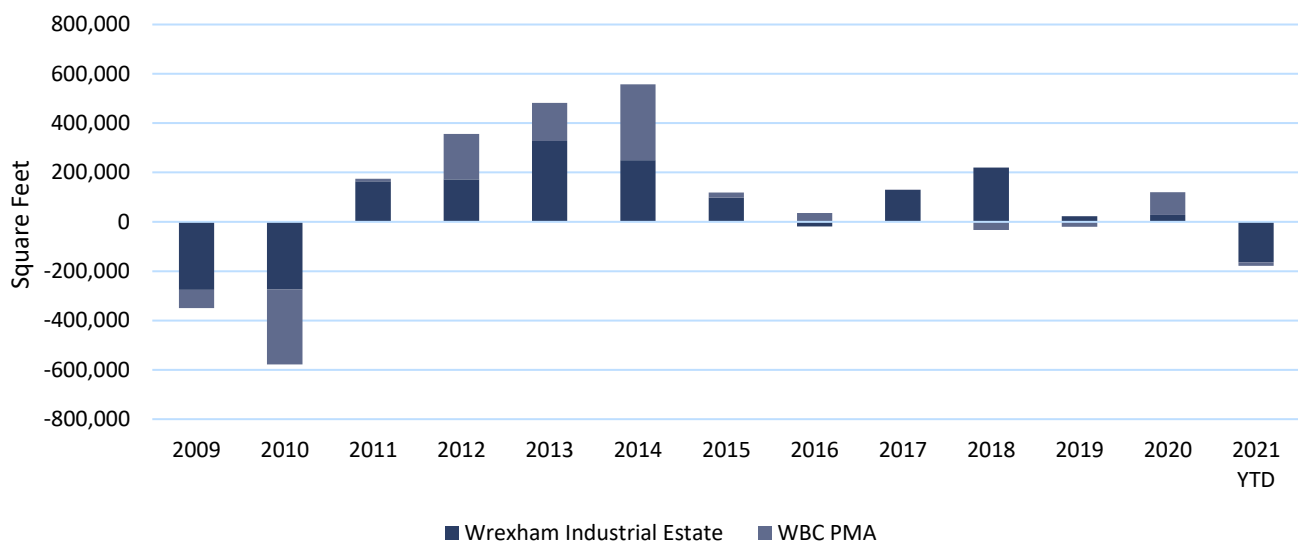


	Inventory (sqft)	Average Net Absorption Per Annum 2009-2021 (sqft)	Annual Net Absorption as % of Total Inventory	Market Rent (£ per sqft)
Industrial	7,681,295	62,034	0.8%	5.21
Light Industrial	234,295	-6,655	-2.8%	5.50

Source: CoStar (2020)

6.3.3. **Figure 6.9** presents the historic net absorption in WBC and the Wrexham Industrial Estate. Despite the supply-constrained status of the Wrexham Industrial Estate, it is the primary driver of demand in WBC. Since 2015 there has been a significant drop-off in net absorption. This is the result of the availability rate in both WBC and at the Wrexham Industrial Estate first exhibiting extremely low rates of about 2% and 1% respectively.

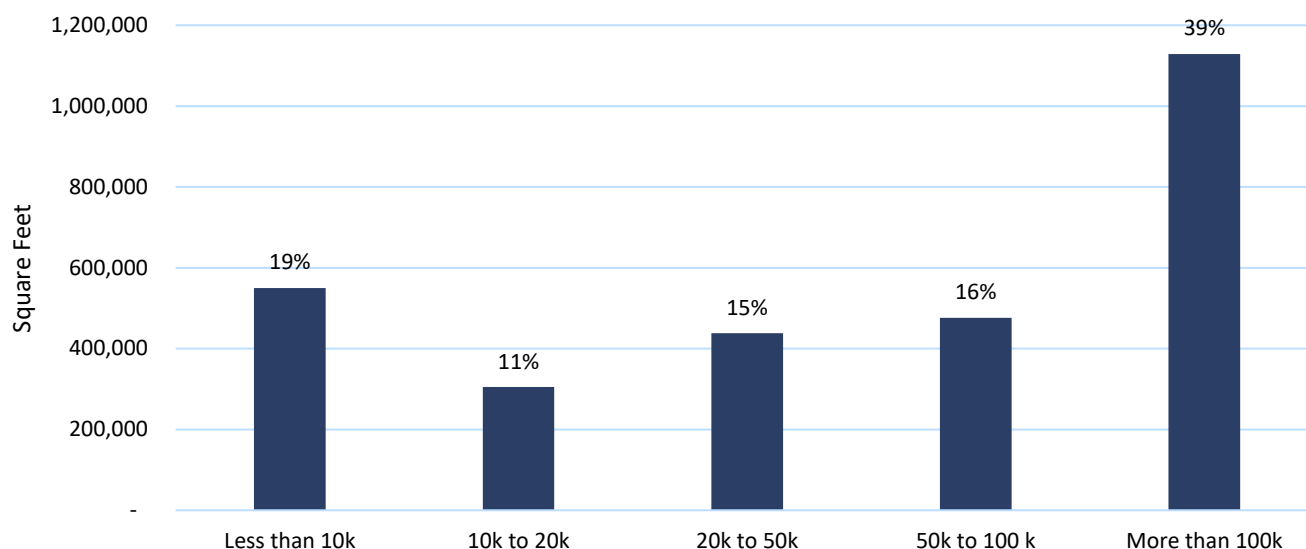
Figure 6.9 Net Absorption in WBC and the Wrexham Industrial Estate



Source: CoStar (2021)

6.3.4. **Figure 6.10** presents gross absorption over the past ten years by size category and floorspace. Although the inventory in the WBC PMA is dominated by premises over 100,000 sqft, requirements are well-distributed across the size categories. About 19% of transaction are for small premises (less than 10,000 sqft); about 42% are for mid-sized premises (10,000 sqft to 100,000 sqft); and 39% are for large premises (more than 100,000 sqft).

Figure 6.10 Gross Absorption by Size of Lease (2011 to Present) in WBC PMA



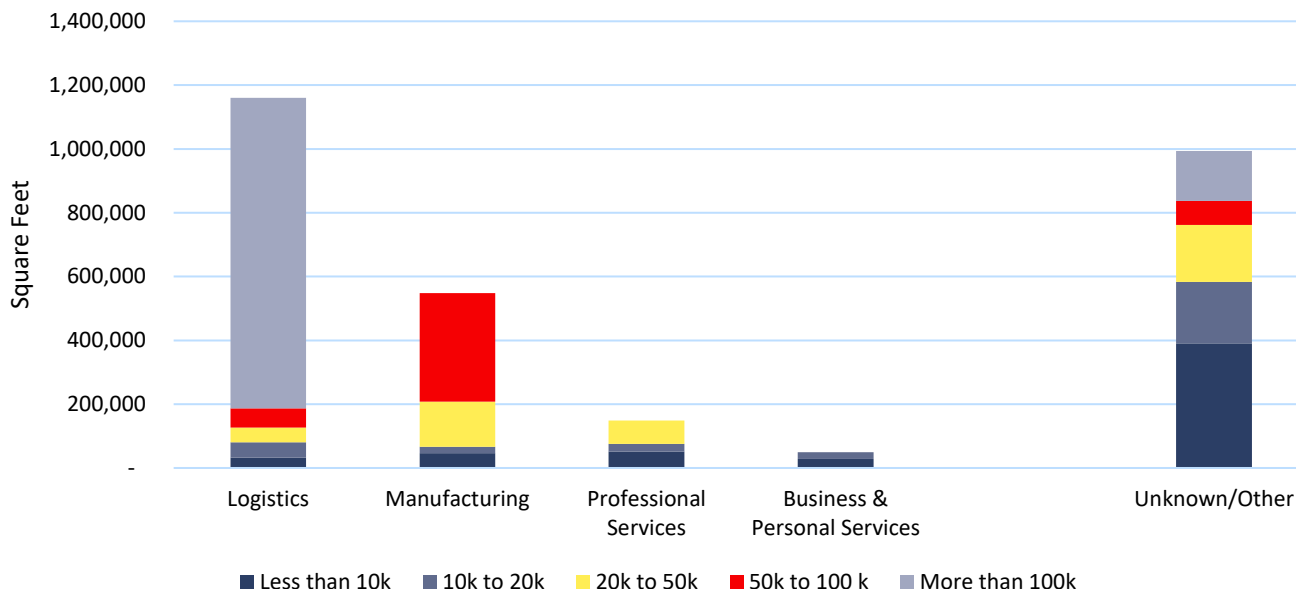
Source: CoStar (2021)

6.3.5. **Figure 6.11** shows the mix of gross absorption over the past ten years by industrial sector and size of premises. The logistics sector (comprised of retail, wholesale and transportation & warehousing) dominates take-up. It represented about 61% of all lease transactions where the industry is identified. Manufacturing is another important element of demand and represents about 29% of lease transactions where the industry is identified.

6.3.6. The following was observed:

- Logistics activities were dominated by larger requirements (more than 100,000 sqft) although the other size categories were well-represented.
- Manufacturing and services tended to have mid-sized requirements (10,000 sqft to 100,000 sqft).

Figure 6.11 Gross Absorption by Industrial Sector and Size Category (2011 to Present) in WBC PMA



Source: CoStar (2021)

6.4. Demand Forecasts

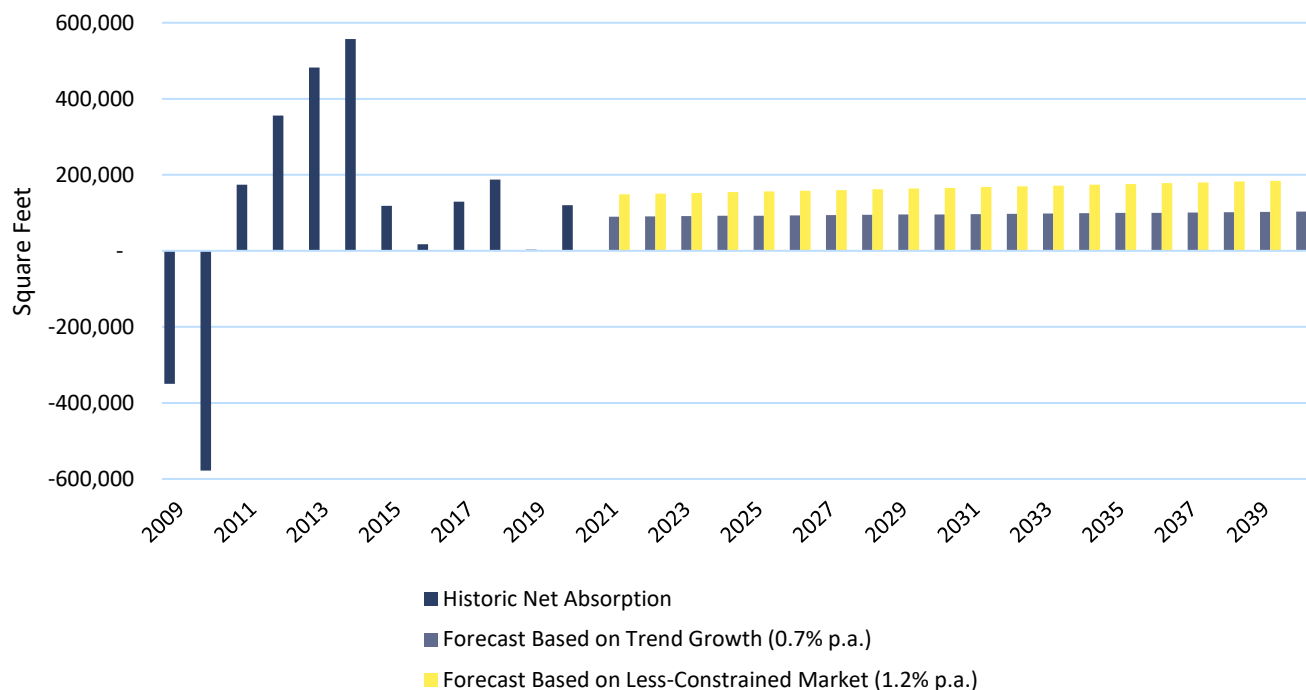
- 6.4.1. **Figure 6.12** presents historic and forecasted net floorspace demand to 2040. Two forecasts are presented. One forecast is based on the historic rate of net absorption which was about 0.7% per annum from 2009 to the present. This shows net take-up of about 90,000 to 100,000 sqft per annum. However during much of the historic series the market experienced an acute shortage of floorspace which restrained demand since there was very limited floorspace available. Therefore we have presented a forecast that could have reflected demand if it had been less constrained. For that forecast we used a rate of 1.2% per annum. This rate is relatively conservative but provides a view as to the amount of additional floorspace that could be taken up if the floorspace were available. At the slightly higher rate, net absorption ranges from about 150,000 to 185,000 sqft per annum. Given that there is currently about 250,000 sqft of available floorspace (of average or below average quality), there is significant need for new, modern industrial premises to meet even trend levels of net absorption.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 6.12 Historic & Forecasted Net Absorption in WBC PMA



Source: CoStar (2021); Savills

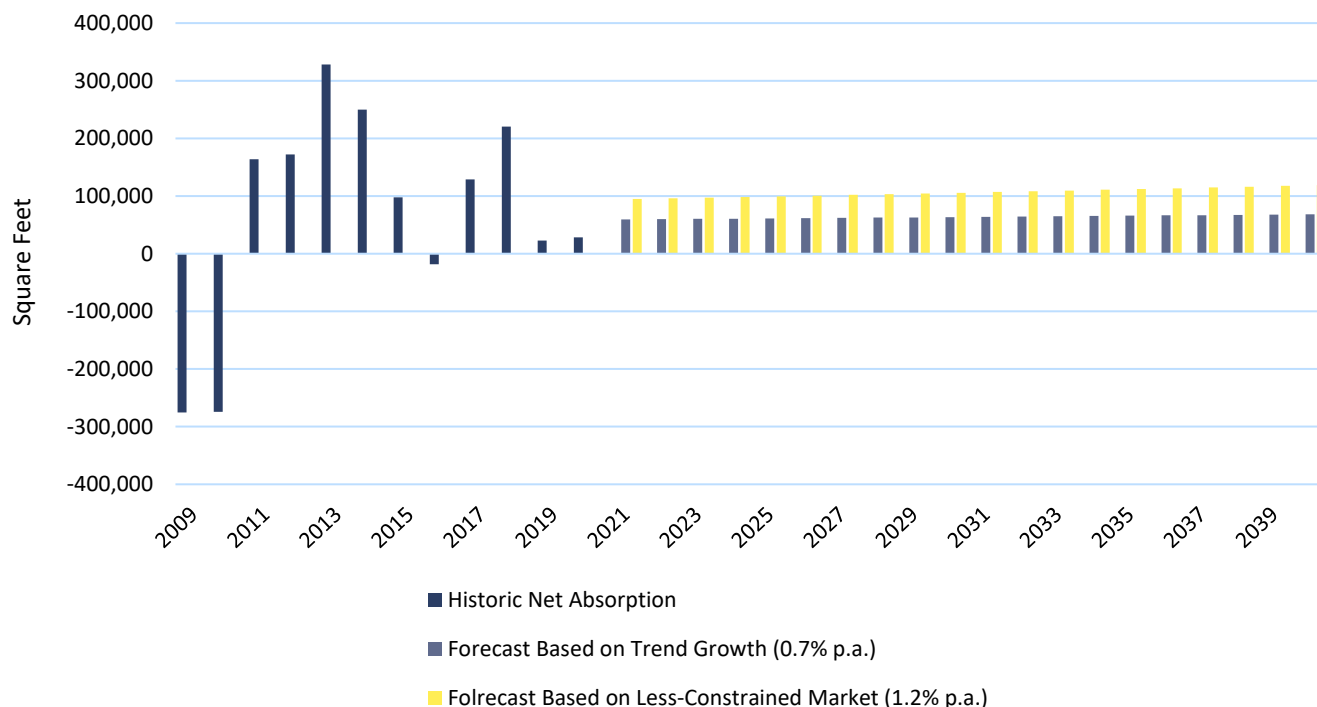
6.4.2. **Figure 6.13** presents the same demand forecasts for the Wrexham Industrial Estate using both the trend forecast of 0.7% (which is the same as for the WBC PMA) and 1.2% to reflect a less-constrained situation. For the Wrexham Industrial Estate, trend-based demand results in net absorption of between 60,000 and 70,000 sqft per annum. The less-constrained scenario shows net absorption of between 95,000 and 120,000 sqft per annum. Given that there is only about 170,000 sqft of available floorspace, the amount of available floorspace is insufficient to ensure the efficient operation of the estate.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Figure 6.13 Historic & Forecasted Net Absorption in the Wrexham Industrial Estate



6.4.3. **Table 6.4** sets out the floorspace demand forecasts based on the above analysis.

Table 6.4 Forecasted Net Absorption in WBC PMA and Wrexham Industrial Estate

	Forecasted Net Absorption Based on Trend Growth (0.7% per annum) (2021)	Forecasted Net Absorption Based on Trend Growth (0.7% per annum) (2040)	Forecasted Net Absorption Based on Trend Growth (1.2% per annum) (2021)	Forecasted Net Absorption Based on Trend Growth (1.2% per annum) (2040)
WBC PMA	90,000	103,000	150,000	185,000
Wrexham Industrial Estate	60,000	70,000	95,000	120,000

Source: Savills (2021)

6.5. Demand Drivers

6.5.1. In the following section we assess the strength of the industrial market in light of recent macroeconomic impacts. It suggests that demand for industrial premises and particularly demand for logistics premises is diverging from its historic demand performance. This suggests that the forecast presented in the previous section are justified and are possible too conservative.

6.5.2. The Covid-19 pandemic highlighted the critical role that the UK logistics sector plays in the economy and its importance for the country's recovery. During the initial lockdown the sector ensured the effective delivery of medical stock to hospitals and food supplies to supermarkets. People have increasingly relied

on online shopping for non-essential purchases. Whilst this trend was already well underway, during the pandemic it accelerated. These trends, which also include automation, reshoring and stockpiling, are all due to increase demand for the UK logistics sector and its floorspace needs.

- 6.5.3. The industrial and logistics market is facing an era of unprecedented change. The past decade has seen the industry undergo a remarkable transformation that has reshaped operating models and occupier requirements in ways that are only starting to become recognisable. Considerations of historic market performance against this new landscape are therefore critical to understand what could lie ahead.
- 6.5.4. Online shopping, including grocery shopping, has been on the rise for over a decade due to digital innovations and changing consumer habits. Data from the ONS in **Figure 6.14** shows that over the last decade internet sales have accounted for increasing percentages of total retail sales, from around 6-7% in 2010 to around 20% in early 2020. The most recent data shows the impact of the country-wide lockdown following the outbreak. ONS data indicates that at its peak in May 2020, a third (33%) of all retail sales had been conducted online.

Figure 4.1 Internet Sales as a Percentage of Total Retail Sales



Source: ONS

- 6.5.5. According to Savills research the share of all online sales is expected to normalise at 24.3% in the UK which is well above the pre-pandemic level Covid. The expectation is for online sales to continue growing from this higher base.
- 6.5.6. Consumers expectations for same day or next day delivery are reshaping operating models of logistics companies. This is expected to increase demand for logistics space away from bricks-and-mortar shops as reduced delivery times are expected to benefit online retailers¹.
- 6.5.7. Research² suggests that e-commerce requires around 3 times the logistics space of traditional brick-and-

¹ McKinsey & Company (2014), *Same-day delivery: The next evolutionary step in parcel logistics*

² Prologis (2016), *Global E-Commerce Impact on Logistics Real Estate*. Online Article

mortar retailers. The decline of bricks-and-mortar shops is likely to be accelerated by the pandemic, having a negative impact on warehouse floorspace demand. However, Savills expect this is going to be more than counter-balanced by the sustained growth in online sales which have a higher space requirement than traditional retail.

- 6.5.8. Covid-19 has also highlighted the level of interconnectedness of existing international supply chains and their fragility when one or more links break. Companies are having to build greater resilience in their operating models to minimise supply-chain-induced disruptions. This is expected to accelerate near-shoring or re-shoring trends, which are likely to lead to higher domestic inventory requirements, further increasing long-term demand for warehousing and logistics space.
- 6.5.9. Temporary shortages of goods have also led to stockpiling, a phenomenon already initiated by Brexit and the uncertainty around future international trade agreements. While this could be regarded as a short-term demand factor, it may also have long-term implications as businesses consider it too risky to have a single warehouse serving their customer base compared to a multiple stocking solution. In real estate terms, stockpiling is expected to lead to an increase in short-term leases and demand for units of smaller size to flexibly accommodated multiple stocking³.
- 6.5.10. Covid-19 has also exposed an issue of labour availability, as staff have been required to quarantine, self-isolate or have taken sick leave in higher numbers. Automation is therefore expected to play an even greater role in future to respond to potential labour shortages in operations requiring physical, on-the-ground presence. Greater automation will also accelerate the shift towards a higher skilled labour force in the sector, with manual and routine operations being replaced by machines that are programmed and controlled by engineers who can potentially work remotely. The level of automation already introduced in the logistics sector has also meant that businesses in this space have been more likely to remain operative during the pandemic, with incomes being affected less than in other sectors of the economy.

6.6. Supply-Demand Balance

- 6.6.1. The supply-demand balance identifies the current ratio of existing and floorspace under construction against the forecasted level of demand in the WBC PMA. This is presented in **Table 6.5**. It shows that there is less than a half-year's worth of available supply.

Table 6.6 Supply-Demand Balance for Industrial and Light Industrial Premises in the WBC PMA

Demand – Supply Balance Factors	
Current Availability (sqft)	250,000
Under Construction (sqft)	140,000
Total Supply	390,000
Immediate Additional Floorspace Required to Achieve an 8% Vacancy Rate	800,000

³ Hatmill (2020), Will a post covid-19 supply chain generate different property requirements? – Online article

Employment Market Study

The Oaks, Cefn Park, Wrexham



Demand – Supply Balance Factors	
Estimated Average Annual Net Take-Up (Based on trend growth in net absorption)	90,000
Total Floorspace Demand	890,000
Ratio (Supply / Demand)	<0.5 Years

Source: Savills (2021)

7. Employment Benefits of Development Proposal

7.1. Introduction and Summary

- 7.1.1. This section presents an estimate of the potential employment benefits arising from the proposed development. This section presents our estimate of economic benefits of the proposed development which responds to element 2 of TAN 23: *'the number of jobs accommodated on the site'*.
- 7.1.2. The assessment follows the approach set out in the 2014 Homes and Communities Agency Additionality Guide (2014). It includes the guidance and method to assess leakage, displacement, deadweight and the multiplier impacts arising from employment premises. The assessment presents the employment creation at construction and operation phases from the proposed development.
- 7.1.3. The assessment is based upon the proposed scheme for 17,100 sqm of floorspace (GFA) comprised of 9,000 sqm (GFA) of light industrial floorspace (E(g)iii) and 8,100 sqm (GFA) of warehouse floorspace (B8). The proposed development is estimated to generate an average of 81 on-site construction jobs per year during the construction period and 57 on-site construction jobs for WBC residents. Once complete and occupied it is estimated that the proposed development will create around 287 on-site operational jobs with 201 of them for WBC residents.

7.2. Construction Jobs

- 7.2.1. This section presents an estimate of construction employment. We have also used data on the output per construction worker in North Wales⁴ to estimate the construction jobs of the proposed scheme. **Table 7.1** sets out the key inputs steps used to estimate construction employment.

Table 7.1 Construction Phase Jobs

Estimated Construction Costs ⁵	£19.0m
Average turnover per construction employee in the Wales (2019-2021)	£116,753
Duration of Construction Phase (years) ⁶	2
Average On-site Construction Jobs For Duration of Construction	81

Source: Savills (2021)

- 7.2.2. We estimate that the construction phase will generate a total of 81 onsite construction jobs. This assumes a two-year construction period. This is referred to in the Additionality Guide (HCA, 2014) as the gross direct employment and is the number of workers onsite, on average, throughout the construction period. We conservatively assume that 30% of the construction workforce will live outside of the Wrexham Local

⁴ Business population estimates for the UK and regions (2018, 2019, 2020) Department for Business, Innovation and Skills

⁵ Estimate based upon on BCIS Online Average Price Calculator

⁶ Estimate based upon on BCIS Construction Duration Calculator

Employment Market Study

The Oaks, Cefn Park, Wrexham

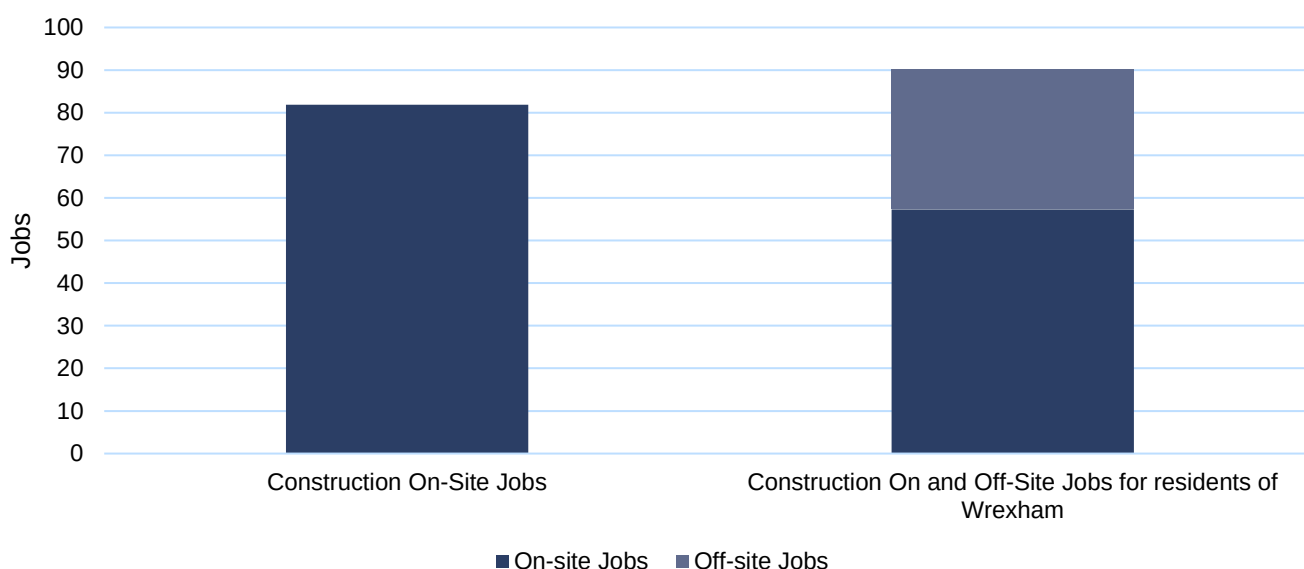


Authority area.⁷ Therefore the on-site jobs for WBC residents would be 57.

7.2.3. The indirect construction employment effects (off-site benefits associated with supply chain activity) are also considered. We allow for a moderate level of displacement of existing construction projects (25%) based on the Additionally Guide (HCA, 2014) guidance.⁸ We apply a multiplier of 2.1 to calculate supply chain activities. This is based on the UK input-output tables published by the ONS. The multiplier is an estimate from the ONS to show how other industries use the outputs of the construction industry in their own economic activity.

7.2.4. **Figure 7.1** and **Table 7.2** present the estimates of the total on and off-site construction jobs created by the proposed development. The proposed scheme is estimated to generate the total of 57 net on-site and 33 net off-site totalling 90 net on and off-site construction jobs for residents of Wrexham.

Figure 7.1 Estimated Construction Phase Jobs



Source: Savills (2021)

Table 7.2 Estimated Construction Phase Jobs

	Development Proposal
Gross Direct Construction Jobs during construction period	81
Leakage (30%)	-24
On-site jobs (for residents of WBC)	57

⁷ This assumption is based on Census 2011 and comprises the proportion of employees in Wrexham Local Authority with a commuting distance longer than 10km

⁸ According to CITB 'Construction Skills Network forecasts 2019 -2023 Wales' construction employment is anticipated to increase by an average yearly rate of 0.8%. An annual recruitment requirement of 2,250 (0.6%), lower than the UK average of 1.2%.

Employment Market Study

The Oaks, Cefn Park, Wrexham



	Development Proposal
Displacement (25%)	-14
Multiplier (2.1)	47
Off-site Construction Jobs	33
Net On and Offsite Construction Jobs per annum	90

Figures may not add up due to rounding

Source: Savills (2021)

7.3. Operational Jobs

- 7.3.1. Operational jobs are created on the proposed development site through the new industrial and light industrial premises.
- 7.3.2. To estimate the gross direct jobs which will be generated in industrial and light industrial premises we apply the employment density assumptions reported in the 'Employment Density Guide' (HCA, 2015). These figures are summarised in **Table 7.3**.

Table 7.3 Employment Density Assumptions

Land Use	Job Density (Sqm per FTE)
Warehousing (GEA sqm per job)	73.5
Light Industrial (NIA sqm per job)	47.0

Source: Homes and Communities Agency (2015)

- 7.3.3. An estimate of the total net local employment effect for each case is presented in accordance with the 'Additional Guide' (HCA, 2014). Again, this incorporates leakage, multiplier, and displacement effects. Additionally we account for small vacancy levels, typical to the local market.
- 7.3.4. **Table 7.4** presents the assumptions used to calculate the total net local operational employment effects. It is assumed that the market is supply-constrained and that the proposed site is seeking to meet a need for space. It is therefore assumed that there will be little displacement of activities.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Table 7.4 Operational Employment Assumptions

Land Use	Leakage from Wrexham District	Displacement	Multiplier	Vacancy
Warehousing	30%	10%	1.66	1%
Light Industrial	30%	10%	1.66	0%

Notes: Leakage assumptions are based on distance travelled to work by industry (workplace population) available through Nomis, and HCA Additionality Guide (2014).

ONS Input Output Analytical Tables (2015) are used to estimate multiplier effects.

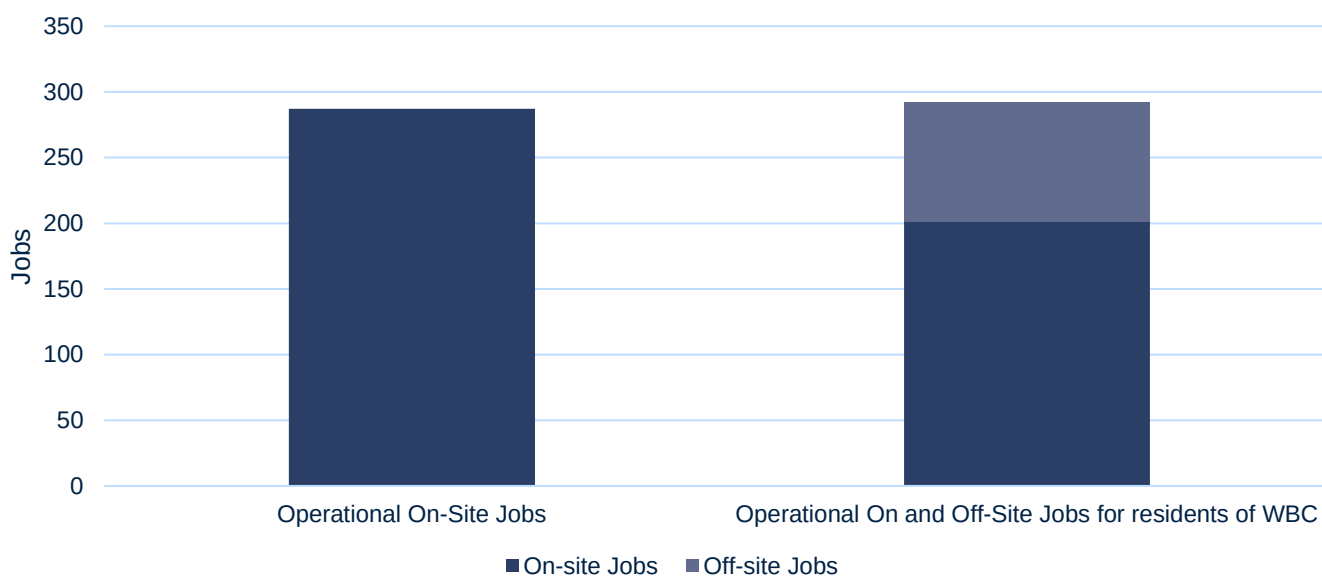
Displacement effects are minimal.

Vacancy levels are estimated based on CoStar data.

Source: Savills, 2021

7.3.5. **Figure 7.2** and **Table 7.5** summarise the estimated net additional jobs created by the proposed allocation. The development would generate an estimated total of 287 gross on-site jobs. Once leakage, displacement and multiplier effects are taken into account the proposed scheme would generate 201 net on-site jobs and 91 net off-site jobs. This totals 292 net on and off-site jobs for residents of WBC.

Figure 7.2 Estimated Operational Jobs



Source: Savills (2021)

Employment Market Study

The Oaks, Cefn Park, Wrexham



Table 7.5 Estimated Operational Jobs in Wrexham

Land Use	Proposed Development
Warehousing	115
Light Industrial	172
Gross Direct Operational Jobs	287
<i>Leakage (Study Area, 30%)</i>	-86
On-site Jobs for Residents of Wrexham	201
<i>Displacement (30%)</i>	-20
<i>Multiplier (1.66)</i>	111
Off-site Jobs	91
Net Direct and Indirect Operational Jobs (rounded)	292

Note: Figures may not add up due to rounding

Source: Savills (2021)

7.4. Conclusion

- 7.4.1. The proposed development is estimated to generate an average of 57 net on-site construction jobs for residents of WBC during the construction period. Once complete and occupied it is estimated that the proposed development will create around 201 on-site jobs for the residents of WBC.

Table 7.6 Summary of Estimated Economic Benefits for Residents of WBC

Outcome	Amount
Total Full-time Equivalent (FTE) On-Site Construction Jobs for WBC Residents	57
Total FTE On-Site Operational Jobs for WBC Residents	201

Source: Savills (2021)

8. Site Appraisals

8.1. Introduction and Summary

- 8.1.1. This section compares The Oaks with the other employment sites available for development in WBC. The site comparison exercise is based on a set of criteria that assesses the sites' commercial attractiveness, deliverability and sustainability. The purpose of the exercise is to compare The Oaks site with alternative employment sites in accordance with element 1 of TAN 23 which covers alternative sites for development and whether 'the demand could be met on a site where development would cause less harm'.
- 8.1.2. We interpret this element of TAN 23 to mean that it is required that sites be assessed against criteria that indicate whether they are likely to effectively meet employment floorspace demand and whether they would cause less harm. Therefore the alternative sites are assessed according to whether they exhibit characteristics related to their commercial attractiveness to determine whether they are suitable to meet demand. We also assess the sites based on whether they are greenfield and brownfield to determine whether the development of the sites would cause harm.
- 8.1.3. From a long list of 59 sites identified in WBC's existing and proposed local plan and evidence base documents, 23 sites were deemed available for development and therefore assessed. The sites were assessed against six criteria. A score from 1 to 3 was given. The better the site performs against a criterion, the higher the score.
- 8.1.4. The findings demonstrate The Oaks is the best site out of ten that are located within the Wrexham Industrial Estate and joint third overall in WBC. Since Wrexham Industrial Estate is WBC's most important employment cluster, The Oaks' ranking is notable.

8.2. Site Appraisal Methodology

- 8.2.1. The comparison exercise is based on assessing each of the 23 sites against six criteria:
- **Site size and shape.** Sites need to be sufficiently large to accommodate a critical mass of employment floorspace. Sites that are rectilinear are more efficiently developed and are more likely to be able to accommodate well specified, flexible modern premises that are commercially attractive to a wider range of potential occupiers.
 - **Greenfield/Brownfield.** Brownfield sites are less likely to do harm to the natural environment. Whilst the development of a brownfield site is less likely to result in a negative environmental impact, the development of a greenfield site typically has a negative environmental impact. Also, the development of brownfield land should take precedence over greenfield as per Policy PS3 in the UDP.
 - **Access to the strategic road network (SRN).** Proximity to the SRN (comprised of A roads and motorways) is critical for logistics operators so that goods can be moved efficiently.

- **Situated within an existing cluster.** Sites within an existing cluster are typically more commercially attractive because of the potential agglomeration effects and proximity to established supply chains. There is also greater likelihood of a suitable operational environment. Such a site is already within a recognised location. Premises that are isolated from other employment uses are less likely to attract occupiers or investors due to a range of potential risks related to commercial attractiveness and a supportive operational environment.
- **Site access.** Easy access to a site means it is typically easier to develop because as it will likely require less new infrastructure related to site access and therefore will be more viable. It will be able to be brought forward more quickly.
- **Deliverability.** This criteria is based on site availability, planning status and barriers to delivery. Sites that have been granted planning permission or awaiting an outcome are known to be available and therefore have a higher chance of being delivered. Sites that have been allocated for a number of years or have been granted planning permission but have not been brought forward are likely to have issues related to its deliverability. Site deliverability can therefore be related to the presence of physical barriers (e.g., site contamination) or more process-related barriers (e.g., fragmented ownership; inability to attract a potential developer/occupier).

8.2.2. **Table 8.1** presents the assessment framework used to score and rank the sites. For each criterion, a score of 1 to 3 is applied. A score of 3 means it has received the highest score for that characteristic. The different scores for each criteria are aggregated to generate a total score.

Table 8.1 Site Assessment Framework

Criteria	Scoring Framework
Size and Shape of Site	Size (Ha) and shape (irregular shape versus rectilinear)
Brownfield / Greenfield	Brownfield scores 3; greenfield scores 1
Access to the SRN	Distance to SRN. Small distance score 3; greater distance scores 1.
Located within an existing cluster	Sites within Settlement Limit score 3; adjacent Settlement Limit scores 2; outside Settlement Limit scores 1.
Site Access	Good Access - 3 Poor Access - 2 No Access – 1
Deliverability	Near term delivery: 3 Medium-term delivery: 2 Longer term delivery - 1
Overall Score	Aggregate of rankings (1-3) provides an overall score out of 15

Source: Savills (2021)

8.3. Initial List of Potential Assessment Sites

8.3.1. This section identifies the initial list of sites that could potentially be assessed. From the initial list, the list of sites for assessment is generated. The initial list of sites are identified from amongst existing and proposed allocations; developable areas within the Settlement Limits of employment areas; and sites with

planning permission. The identified sites are from the existing and proposed local plan and evidence base documents. The list of potential sites are set out in **Table 8.2**. Of the 59 sites, 36 were discounted because they are considered to be unavailable. Justification for their discounting is provided in the **Table 8.2**.

8.3.2. Sites have been discounted because: 1) the site has already been developed and therefore not available or 2) the site has been identified for expansion/for specific occupiers and therefore unavailable to the wider market. The sites which are not discounted are identified by their light green shading.

8.3.3. The Oaks is shown in the potential sites list twice. It appears as 'Subject Site' at the top of **Table 8.2** and the second time as 'Site B'. This is due to the 'Subject Site' being a smaller parcel of developable land than 'Site B' which was initially assessed through the 2015 ELR. 'Site B' is not taken forward for assessment.

Table 8.2 Initial List of Potential Assessment Sites

Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
	'Subject Site' The Oaks	Cefn Park, Wrexham Industrial Estate	5.9	Available	Taken forward for assessment
Draft LDP Proposed Allocation	KSS	Gresford Industrial Estate	28	Available	Taken forward for assessment
UDP Allocation	E1.1	Abbey Road	1.4	Developed	Excluded from Assessment, due to site being developed. Not available.
UDP Allocation	E1.2	Abenbury Way	1.7	Developed	Excluded from Assessment, due to site being developed. Not available.
UDP Allocation	E1.3	Ash Road South (i)	2.6	Developed	Excluded from Assessment, due to site being developed. Not available.
UDP Allocation	E1.4	Ash Road South (ii)	7.3	Expansion Land	Excluded from Assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	E1.5	Ash Road South (iii)	0.8	Developed	Excluded from Assessment, due to site being developed. Not available.
UDP Allocation	E1.6	Bryn Cottages	3.6	Available. Suggested by Council ecologists as a possible ecological refuge/mitigation site	Taken forward for assessment
UDP Allocation	E1.7	Bryn Lane	9.5	Developed	Excluded from assessment, due to site being developed. Not available.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
UDP Allocation	E1.8	Clywedong Road North	1.9	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	E1.9	Clywedong Road East	2.2	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	E1.10	Clywedog Road South (i)	3.3	Available. Planning permission for industrial units on part of site	Taken forward for assessment
UDP Allocation	E1.11	Clywedong Road South (ii)	5	Available. Outline Planning Permission granted on site.	Taken forward for assessment
UDP Allocation	E1.12	Clywedog Road South (iii)	3.25	Available. Outline Planning Permission granted on site.	Taken forward for assessment
UDP Allocation	E1.13	Coed Aben Road	2.6	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	E1.14	Dunster Road	1.5	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	E1.15	Bedwell Road	2.9	Available. Suggested by Council ecologists as a possible ecological refuge/mitigation site	Taken forward for assessment
UDP Allocation	E1.16	Redwither (i)	2.1	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	E1.17	Redwither (ii)	0.9	Available. Seeking Disposal of Site	Taken forward for assessment
UDP Allocation	E1.18	Redwither (iii)	2.1	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	E1.19	Redwither (iv)	0.9	Available. Seeking Disposal of Site.	Taken forward for assessment
UDP Allocation	E1.20	Redwither (v)	0.38	Developed in part; remaining parcel of land available.	Taken forward for assessment

Employment Market Study

The Oaks, Cefn Park, Wrexham

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Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
UDP Allocation	E1.21	Ridley Wood Road	3.3	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	E3	Owens Corning	32.2	Available. Reserved Matters Granted for B2/B8 for northern part of the site. Outline Planning granted for southern part of the site.	Taken forward for assessment
Within WIE Settlement Boundary	Site A	Abenbury Way (ii) JCB Expansion land	6	Developed / Expansion land	Excluded from assessment, due to part of the site being developed and part of the site identified by owner for expansion land. Not available.
Within WIE Settlement Boundary	Site B	Cefn Park Redwither Road	11.5	Available. Expired Application on the site.	Excluded because it includes The Oaks.
Within WIE Settlement Boundary	Site C	Coed Aben Road (ii & iii)	2.35	Available, owner looking to dispose of the site.	Taken forward for assessment
Within WIE Settlement Boundary	Site F	Redwither Road (i)	0.74	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
Within WIE Settlement Boundary	Site G	Redwither Road (ii)	0.99	Available. Most of the site is made up of Woodland.	Taken forward for assessment
Within WIE Settlement Boundary	Site Hi	Bridge Road (Firestone site)	26	Developed	Excluded from assessment, due to site being developed. Not available.
Within WIE Settlement Boundary	Site Hii	Bridge Road (Firestone site)	20	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Acrefair 22	Wynnstay Technology Park	0.4	Available. Site considered too small for a number of occupiers.	Taken forward for assessment
UDP Allocation	Gresford 23	Gresford Industrial Estate	1.1	Available. Outline Application Expired on the site.	Taken forward for assessment
UDP Allocation	Johnstown 24	Johnstown: Vauxhall Industrial Estate	0.7	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
UDP Allocation	Llay 25	Llay: Industrial Estate i	3.3	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	Llay 26	Llay: Industrial Estate ii	0	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	Llay 27	Llay: Industrial Estate iii	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 28	Llay: Industrial Estate iv	1.4	Available. Currently no access to the site.	Taken forward for assessment
UDP Allocation	Llay 29	Llay: Industrial Estate v	1.2	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.
UDP Allocation	Llay 30	Llay: Industrial Estate vi	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 31	Llay: Industrial Estate vii	6.4	Available. No planning permission on the site.	Taken forward for assessment
UDP Allocation	Rhos 32	Rhosllannerchrugog: Coppi Industrial Estate	0.4	Developed in part. Remaining land available, but currently used as open storage.	Taken forward for assessment
UDP Allocation	Rhostyllen 33	Rhostyllen: Croesfoel Industrial Estate	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Rhosymedre 34	Rhosymedre: Plas Kynaston	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Wrexham 35	Wrexham: Pandy Industrial Estate	0.7	Available. Full Planning Permission for 2 industrial units.	Taken forward for assessment
UDP Allocation	Wrexham 36	Wrexham: Queensway Industrial Estate	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Wrexham 37	Wrexham: Rhosddu Industrial Estate	0.9	Expansion Land	Excluded from assessment, due to site being identified by owner for expansion land. Not available.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
UDP Allocation	Wrexham 38	Wrexham: Technology Park	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Wrexham 39	Wrexham: Ruthin Road Development Area	4.2	Available. Application is expected by the Council.	Taken forward for assessment
UDP Allocation	Brymbo 8	Brymbo Former Steelworks	8	Available. Looking to bring forward for residential .	Taken forward for assessment
UDP Allocation	Gwersyllt 9	Gwersyllt Adj Graham Packaging Mold Road	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Hafod 10	Hafod Adj Dennis Ruabon	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Johnstown 11	Johnstown Vauxhall Industrial Estate	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 12	Llay Industrial Estate (D)	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 13	Llay Industrial Estate (F)	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 14	Llay Industrial Estate (H)	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 15	Llay Industrial Estate (I)	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 16	Llay Industrial Estate (K)	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Llay 17	Llay Hall Industrial Estate	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Pentre 18	Pentre Broughton Quarry Road	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Ruabon 19	Ruabon Adj A483	3.4	Available. Application is expected by the Council.	Taken forward for assessment

Employment Market Study

The Oaks, Cefn Park, Wrexham



Basis For Initial Site Consideration	WBC Site Ref	Site Name	Developable Land (ha)	Site Status	Determination of Whether To Assess or Exclude
UDP Allocation	Ruabon 20	Ruabon Gardden Industrial Estate	0	Developed	Excluded from assessment, due to site being developed. Not available.
UDP Allocation	Wrexham 21	Wrexham Technology Park	0	Developed	Excluded from assessment, due to site being developed. Not available.

Source: Various WBC Evidence Base Documents; Savills (2021)

8.4. Assessed Sites

8.4.1. **Table 8.3** below presents the 23 sites (including The Oaks) that have been taken forward for assessment. The first column of the table shows the assessment reference number for the assessment, which have been ordered based on their distance from The Oaks.

Table 8.4 Sites for Assessment

Assessment Reference Number	WBC Evidence Base Ref	Site Name & Location	Developable Land Ha
Subject Site	The Oaks	Cefn Park, Wrexham Industrial Estate	5.90
1	E1.6	Bryn Cottages, Wrexham Industrial Estate	3.60
2	Site G	Redwither (i) , Wrexham Industrial Estate	0.99
3	E1.20	Redwither (v) , Wrexham Industrial Estate	0.38
4	E1.19	Redwither (iv) , Wrexham Industrial Estate	0.40
5	E1.17	Redwither (ii) , Wrexham Industrial Estate	0.90
6	Site C (ii)	Coed Aben Road (iii) , Wrexham Industrial Estate	0.95
7	Site C (i)	Coed Aben Road (ii) , Wrexham Industrial Estate	0.85
8	E1.12	Clywedog Road South (iii) , Wrexham Industrial Estate	3.00
9	E1.10	Clywedog Road South (i) , Wrexham Industrial Estate	1.21
10	E1.11	Clywedong Road South (ii) , Wrexham Industrial Estate	1.96
11	E3	Owens Corning, Wrexham Industrial Estate	32.00
12	KSS	Land north of Bryn Lane, Wrexham Industrial Estate	28.00
13	E1.15	Bedwell Road, Wrexham Industrial Estate	2.90
14	Wrexham 39	Wrexham: Ruthin Road Development Area	4.20
15	Wrexham 35	Wrexham: Pandy Industrial Estate	0.70
16	Gresford 23	Gresford Industrial Estate	1.10

Employment Market Study

The Oaks, Cefn Park, Wrexham

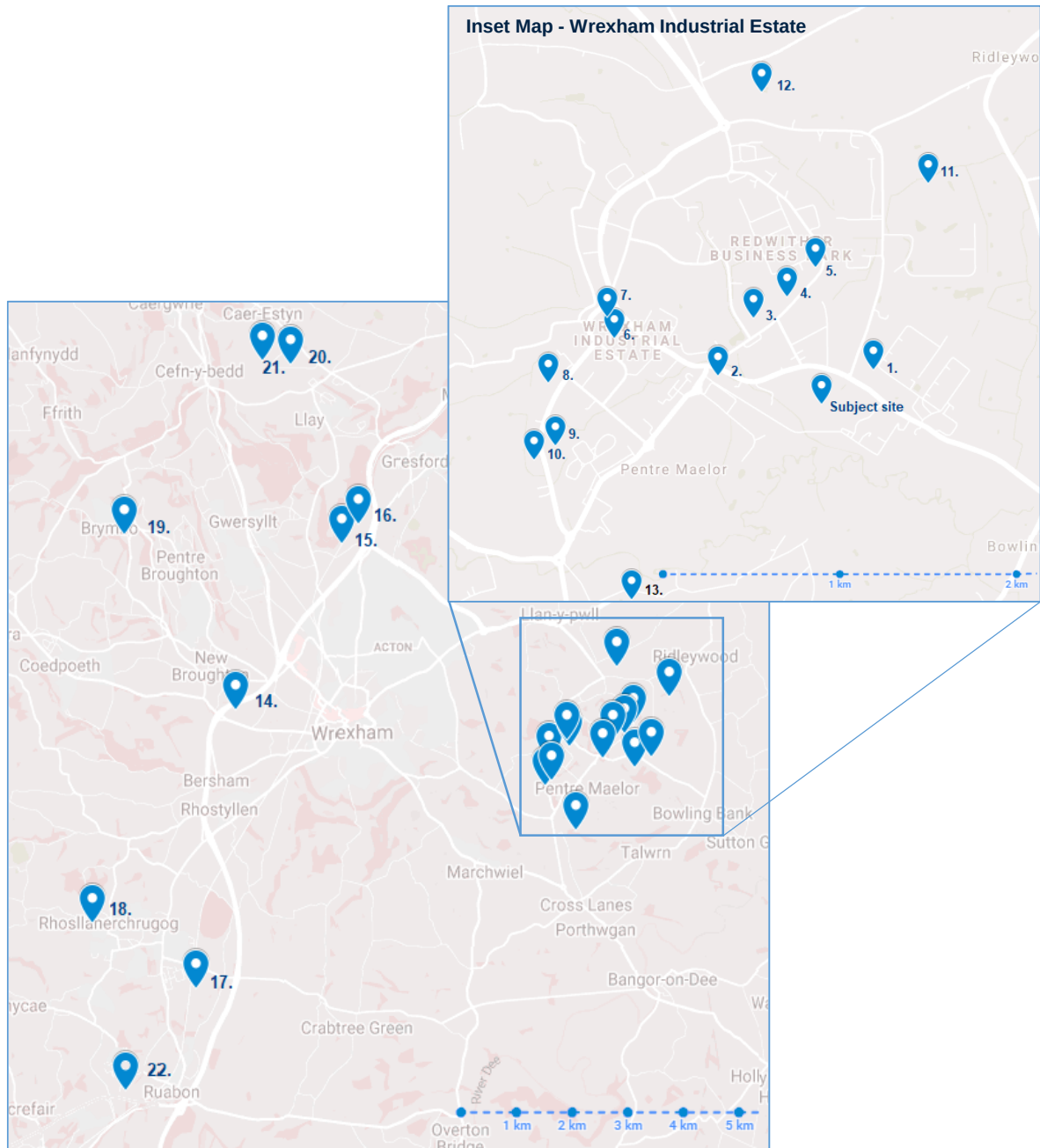


Assessment Reference Number	WBC Evidence Base Ref	Site Name & Location	Developable Land Ha
17	Ruabon 19	Ruabon Adj A483, Ruabon Industrial Estate	3.40
18	Rhos 32	Rhosllannerchrugog: Coppi Industrial Estate	0.40
19	Brymbo 8	Brymbo Former Steelworks	8.00
20	Llay 28	Llay: Industrial Estate iv	1.40
21	Llay 31	Llay: Industrial Estate vii	6.40
22	Acrefair 22	Wynnstay Technology Park	0.40

Source: Savills (2021)

8.4.2. **Figure 8.1** presents a map of the assessed sites. It includes an insert with the sites in Wrexham Industrial Estate. The remaining nine sites are located elsewhere in WBC.

Figure 8.1 Assessed Sites



Source: Savills (2021)

8.5. Overall Conclusions From the Site Assessment

8.5.1. **Table 8.4** uses the criteria to rank the employment allocations. The Oaks ranks joint first amongst the sites within Wrexham Industrial Estate and it ranks joint third across WBC. The Oaks' rank within Wrexham Industrial Estate is particularly notable given the estate's regional importance, strong demand and acute premises shortage.

8.5.2. The Oaks is a deliverable site within a well-established employment cluster. It benefits from being within

the current Settlement Limit and close to established businesses and future demand opportunities (due to size of site and location to meet demand).

- 8.5.3. The Oaks is a brownfield site under single ownership that could be delivered within one to three years. The Oaks is also suitable to meet the identified needs set out in the ELR to deliver land parcels between 2 to 5 ha capable for delivering units of 929 to 1,858 sqm. The Oaks could meet this need but because its area dedicated to employment land is slightly larger at 5.9ha it can also meet larger requirements. There is also demonstrated demand identified from the marketing exercise presented below.
- 8.5.4. The other three sites in Wrexham Industrial Estate which also score 15 were allocated in the 2005 UPD for employment land but have yet come forward in their entirety which suggests that the remaining developable land may not be highly deliverable. Two of the sites (8 and 9) were recently granted planning permission and could contribute to short term supply. Site 10 has an expired outline permission and the remaining plot is small. The delivery of these three sites would not significantly alter the acute shortage of developable employment land.
- 8.5.5. Also, the Oaks ranks above the single allocation in WBC's draft LDP (site 12). Site 12 has capability to deliver a large quantum of employment land in the longer term. However, it is within five different ownerships and requires access improvements. It currently falls outside of the current Settlement Limit and is greenfield land so the development would cause relative environmental harm compared to The Oaks. The timeframe for its deliverability is unknown as there is no masterplan or planning application.

Employment Market Study

The Oaks, Cefn Park, Wrexham



Table 8.4 Findings of Site Assessment

Our ref	WBC Local Plan and/or Evidence Base Ref	Site	Developable Land Ha	Site Shape and Size	Greenfield/Brownfield	Distance to SRN	Situated within an existing cluster	Site Access	Deliverability	Overall Score	Comments
14	WREXHAM 39	Wrexham: Ruthin Road Development Area	4.2	3	1	3	3	3	3	16	Part of site developed. Access needs to be established for remainder of the site. Extension of time granted (2017) until 2022 for outline mixed use planning application. Surrounding uses are B1 and residential. Unlikely to be supported for industrial use in this location.
17	19 Ruabon	Ruabon Adj A483	3.4	3	1	3	3	3	3	16	Site is under construction development.
The Oaks		Cefn Park, Wrexham Industrial Estate	5.9	3	3	1	3	2	3	15	Under single ownership. Brownfield site. Demonstrated demand for site. Planning permission originally granted in 2000 for employment. Site access requires modest enhancement.
10	E1.11	Clywedog Road South (ii)	1.96	2	1	3	3	3	2	15	3 small disconnected plots make up the site. Outline planning permission expired in 2019 for 5 industrial units on one of the plots which already has access.
9	E1.10	Clywedog Road South (i)	1.21	2	1	3	3	3	3	15	Access already established through built out development on part of the site. Full planning permission granted (2020) for an extension to the existing building.
8	E1.12	Clywedog Road South (iii)	3	2	1	3	3	3	3	15	Irregular shape. Full planning permission granted (2019) for light industrial And B2 / B8..

Employment Market Study

The Oaks, Cefn Park, Wrexham



Our ref	WBC Local Plan and/or Evidence Base Ref	Site	Developable Land Ha	Site Shape and Size	Greenfield/Brownfield	Distance to SRN	Situated within an existing cluster	Site Access	Deliverability	Overall Score	Comments
19	8 Brymbo	Brymbo Former Steelworks	8	3	3	1	3	3	1	14	Due to previous use access and infrastructure in place. Remediation likely required. Extension to outline planning permission granted 2012 but now expired. No further applications submitted.
22	ACREFAIR 22	Wynnstay Technology Park	0.4	1	1	3	3	3	3	14	The wider site gained outline planning permission for residential and part of site for six industrial units in 2018. Reserved matters application for residential element (2021).
1	E1.6	Bryn Cottages	3.6	3	3	1	3	2	1	13	Irregular shape. Poor access. Site delivery in the longer term (5+ years). Suggested by WBC ecologist as ecological refuge/mitigation site.
3	E1.20	Redwither (v)	0.38	1	3	2	3	1	3	13	No direct access off highway onto undeveloped part of the site. But potential to share access with neighbouring site.
7	Site C (ii)	Coed Aben Road (ii)	0.85	1	3	2	3	3	1	13	No planning application submitted. Site currently used as transport depot.
13	E1.15	Bedwell Road	2.9	2	1	3	3	1	1	11	No access. Great Crested Newts ponds likely to inhibit development. Council ecologists wish to see site retained for ecology. Owner seeking to sell. Site could be delivered in the longer term (5+ years).

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6	Site C (iii)	Coed Aben Road (iii)	0.95	1	1	2	3	1	3	11	No direct access but received permission in 2021 for B2/B8 use.
2	Site G	Redwither Road(i)	0.99	2	1	3	3	1	1	11	No direct access. Access difficult due to dense woodland on site. WBC ecologist view is that this site is ideal ecological reserve area. Due to access issues site could be delivered in the longer term (5+ years).
12	KSS	Land north of Bryn Lane	28	3	1	2	2	2	1	11	This site proposed for allocation in draft LDP. Access to the site is currently poor. Fragmented ownership.
16	GRESFORD 23	Gresford Industrial Estate	1.1	2	1	3	3	1	1	11	Irregular shape due to surrounding a substation. No direct access but proposed access considered acceptable through expired permission from 2009. Due to access issues and length of time since planning permission site deliverability longer term (5+ years).
21	LLAY 31	Llay: Industrial Estate vii	6.4	3	1	1	3	1	1	10	No access. There is the potential to explore sharing the access with adjacent development, however due to multiple ownerships, this may be difficult. Deliverability is considered to be longer term (5+ years).

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15	WREXHAM 35	Wrexham: Pandry Industrial Estate	0.7	1	1	3	3	1	1	10	Irregular shape. No direct access. Requires access through adjacent development. Granted full planning permission for two units totalling 855 sqm but now expired. Considered deliverable in the longer term (5+ years).
18	RHOS 32	Rhosllannerchrugog: Coppi Industrial Estate	0.4	1	1	1	3	3	1	10	Site is not being considered for development at this time as being used for open storage for surrounding businesses.
5	E1.17	Redwither (ii)	0.9	1	1	2	3	1	1	9	No direct access. There is potential to share access with adjacent development but under different ownership. Owner looking to sell. Site could be delivered in the longer term (5+ years).
4	E1.19	Redwither (iv)	0.4	1	1	2	3	1	1	9	No direct access. There is potential to create access off Bridge Rd North or via adjacent site. Owner looking to sell. Site could be delivered in the longer term (5+ years).
20	LLAY 28	Llay: Industrial Estate iv	1.4	2	1	1	3	1	1	9	No access off the highway onto the site. There is the potential to explore sharing the access with adjacent development. There planning history. Deliverability is considered to be longer term (5+ years).

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The Oaks, Cefn Park, Wrexham



Our ref	WBC Local Plan and/or Evidence Base Ref	Site	Developable Land Ha	Site Shape and Size	Greenfield/Brownfield	Distance to SRN	Situated within an existing cluster	Site Access	Deliverability	Overall Score	Comments
11	E3	Owens Corning	32	2	1	2	2	1	1	9	Appeal decision for reserved matters granted in 2013 for the northern part of the site. Application proposes to use existing access from adjacent site to the south. Outline permission for 37,160 sqm B2/B8 development on the southern part of the site.

Employment Market Study

The Oaks, Cefn Park, Wrexham



8.6. Additional Assessment of The Oaks Including Results of Site Marketing

8.6.1. CPD has been marketing The Oaks since 2018 and is regularly contacted by prospective occupiers. The site is one of the few currently being actively promoted in Wrexham Industrial Park and is able to offer both leasehold and freehold interests. CPD has identified a range of active requirements for small and mid-sized light industrial premises; mid-sized storage and distribution premises; and manufacturers looking for a larger premises.

8.6.2. CPD's website for The Oaks has drawn a range of expressions of interest. CPD has received nineteen formal expressions of interest which are presented in **Table 8.5**.

Table 8.5 Formal Expressions of Interest in Premises at The Oaks

Type of Company	Requirement	Use Class	Type of Enquiry	Leashold or Freehold
Steel Fabricators	2.5 acres for expansion or a new 5 acre site for relocation	B2	Expansion and Relocation	Freehold
Starter Units	3 to 5 acres	B1	New	Freehold
Light engineering and commercial gas engineers	2 acres with 5,000 sqft building	B1 / B2	Relocation from Minera	Freehold
Contractors Yard	TBD	Sui generis	Relocation from Llay	
Offices, warehousing, haulage yard	5+ acres	B8	Relocation	Freehold
Offices, maintenance, warehousing, haulage yard	6 to 8 acres	B8	Relocation	Freehold
Tyre depot and fitters	3,000 to 6,000sqft on 1 acre	Sui generis	Relocation from Gwersyllt	Freehold
Truck dealers with 500sqft office	4 to 5 acres	Sui generis	Relocation from Denbighshire	Freehold
Secure document storage for about 24,000sqft unit	1+ acres	B8	Relocation from Shropshire	Leasehold initially and then freehold
Furniture storage and distribution	30,000 sqft building and 5 acres	B8	Relocation from Cheshire	Freehold
Butchers / Slaughterhouse		Sui generis	Relocation from Gwersyllt	Freehold or leasehold

Employment Market Study

The Oaks, Cefn Park, Wrexham



Type of Company	Requirement	Use Class	Type of Enquiry	Leashold or Freehold
Manufacturing & Storage	100,000 sqft	B2 / B8	Inward investment	Leasehold
Light manufacturing		B1	Relocation	Freehold
Commercial vehicle repair and MOT		Sui generis	Relocation and expansion	Freehold
Waste depot and tanker storage	1 to 2 acres	Sui generis	Expansion	Freehold
Convenience store	4,000 sqft	A1	New	Freehold or leasehold
Auger manufacturing engineering firm	10,000 sqft and 3 to 5 acres	B2 / B8	Relocation and from Sandycroft	Freehold
Training / Gym	5,000 sqft unit	B1 + D2 unit	New	Freehold
Textile engineering, sewing, CNC and CAD design	5,000 sqft	B1 / B2	Relocation and expansion	Freehold

Source: Cefn Park Developments (2021)