Bridgend County Borough Council Economic Evidence Base Study

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1 INTRODUCTION

1.1 PBA, now part of Stantec (PBA) was commissioned by Bridgend County Borough Council (BCBC) in December 2018 to prepare an economic evidence base study to inform the ongoing review of the adopted Bridgend Local Development Plan ('the LDP Review').

1.2 This study, which covers the 2018–2033 LDP period, forms a key evidence base document to inform the LDP Review and the production of a replacement LDP by 2021. This report examines the required scale and distribution of employment need over the LDP Period and identifies the land best suited to meet the need. In doing so, the report makes policy and site-based recommendations to inform emerging policies and site allocations.

Context

1.3 BCBC has determined that a review of the existing LDP (adopted September 2013) is needed to allow a replacement LDP to be adopted prior to the expiry of the current LDP in September 2021. The Bridgend LDP Review Report (BCBC, 2018) concludes that the 'Full Review' procedure is needed to undertake a comprehensive review of the existing LDP and prepare a replacement LDP, as opposed to the 'Short Form' procedure which would only result in minor revisions (e.g. changes to the wording of individual policies or the addition of individual allocated sites) to the existing LDP. It is considered that a replacement LDP is needed to take account of a range of new Acts, policy frameworks, initiatives, evidence and spatial issues at national, regional and local levels since the adopted of the current LDP.

1.4 This report provides a transparent evidence base to link the underlying Borough socio-economic baseline with the identification of employment land need, land supply and policy recommendations. In doing so, the report provides the evidence necessary to underpin the development of a robust employment land and wider economic growth strategy for the replacement LDP period.

1.5 The preparation of this report has taken full account of current relevant national policy and guidance, in particular the implications of the recently published Planning Policy Wales (PPW) – 10th Edition (December 2018) and the Well-being of Future Generations (Wales) Act 2015 with respect to the need improve economic, social, environmental and cultural well-being. Due regard has also been had to relevant information and assessment requirements set out in the Welsh Government's Technical Advice Note (TAN) 23 Economic Development (2013), Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan (2015), LDP Manual – 2nd Edition (2015) and the emerging Development Plans Manual.

Purpose and objectives

1.6 The purpose of this report is to contribute to the LDP Review evidence base by identifying the County Borough's employment land requirements for the replacement LDP period (2018-33) and to assess the suitability of the existing employment land supply to meet these needs. The report therefore determines any need for new or additional employment land to be allocated to meet future requirements for all employment sectors over the replacement LDP period.

1.7 In accordance with relevant policy and guidance, the report responds directly to and is structured around the three overall project objectives as specified by BCBC:

1. Undertake a policy review of the implications of existing and emerging national, regional and local policies to identify requirements and drivers which should be reflected in an economic strategy and employment allocations for the new LDP.
2. Prepare a local and larger than local evidence base building upon the Council's existing evidence base, this should provide a profile of the economy within the Council area, and how this 'nests' within, and relates to, higher level regional and national economies.
3. Undertake an employment land review, encompassing three main work streams:
    a. Property Market Assessment – an analysis of employment land supply and demand requirements, and viability considerations, cross-referencing with the analysis of land take-up.
    b. Audit of Employment Sites - (committed and candidates) – a review of change in the fitness for purpose of the existing employment stock and available land, based on physical and policy opportunities and constraints together with an assessment of market attractiveness. In the interests of continuity of evidence the audit was largely based on the previous 2009 audit, with the main change being a greater focus on market attractiveness.
    c. Calculation of Employment Land Requirements – using past completions and labour demand forecasting methods.

Key Terms

1.8 At the outset it is important to clearly set out the difference between two important concepts of relevance to identifying employment land requirements, namely 'Jobs' and 'Economically active' persons. These two measures are commonly conflated in both policy and evidence, partly because are not always defined, which can lead to uncertainty regarding the quantum of land needed to satisfy employment needs.

1.9 The number of 'jobs' in a local economy is of primary importance in identifying new employment land requirements. This is because the purpose of reviewing the employment land supply is to ascertain whether sufficient land or floorspace is available to meet the physical needs of each additional job in the economy, i.e. it is assumed that each ‘office’ job needs a desk and thus associated floorspace / land.

1.10 The need to focus on ‘jobs’ means that care must be taken when considering the employment implications of demographic projections. In reality, one person may have more than one job (e.g. two part time jobs) due to a range of factors (availability of employment, lifestyle factors, choice, population ageing etc.) and due to population ageing this is a growing trend in the economy. Furthermore, the number of employed persons in the economy is not a proxy for job availability. As such, projections of ‘employed persons’ in the economy under particular growth scenarios cannot be used to determine employment land requirements and demographic evidence cannot directly be taken as a guide to the number of jobs. Rather, as detailed in this report, employment need must be calculated based on the availability and requirement for jobs.

2 POLICY BACKGROUND

Overview

2.1 This section identifies the policy context and requirements which need to be addressed in developing a new employment land and wider economic growth strategy for the Bridgend replacement LDP. This informs the assessment of employment needs, identification of employment land requirements and evaluation of the existing employment land supply set out in subsequent chapters.

2.2 In accordance with statutory requirements, other relevant plans and programmes at international, national, regional and local level have been reviewed to identify key implications and requirements for the Bridgend replacement LDP, as detailed within the Bridgend LDP Pre-Deposit Documents (LDP Preferred Strategy) Sustainability Appraisal Report (PBA, 2019). From this review, of relevance to economic wellbeing and employment issues it is clear that the replacement LDP should:

- Capitalise on the socio-economic opportunities presented by the Cardiff City Region City Deal and the implementation of the South Wales Metro;
- Align with the emerging National Development Framework (NDF) for Wales and the preparation of a Strategic Development Plan (SDP) for the Cardiff City Region;
- Seek to implement the locally defined wellbeing objectives set out within the Bridgend Wellbeing Plan (2018-2023);
- Secure sustainable economic growth and inward investment across the BCBC area through allocating suitable sites for development and delivering the infrastructure required to increase connectivity, improve community and social infrastructure and increase access to high quality employment and economic opportunities;
- Set out a spatial strategy which maximises the economic competitiveness of the BCBC area, taking account of its existing economic base and the industrial strengths of South Wales;
- Identify and plan to meet the needs (including employment needs) of all residents and workers within the BCBC area; and,
- Use land efficiently by prioritising the use of previously developed / brownfield land.

2.3 Having regard to these core requirements, the subsection below provides a more detailed review of the relevant strategic national planning context and national planning guidance. The chapter then the summarises the guidance for preparing a robust economic development evidence base and concludes with a review of the Borough’s existing economic objectives and employment land policies from the adopted Bridgend LDP (2013).

Strategic National Planning Context

Wales Spatial Plan (People, Places, Futures)

2.4 Prepared in 2004 and updated in 2008, the Wales Spatial Plan provides the context for land use planning in Wales. The Wales Spatial Plan currently remains in force but in due course1 will be replaced by the Welsh National Development Framework (NDF). This will set out a new 20-year land use framework and spatial vision for Wales aligned with the Planning (Wales) Act 2015 and the Well-being of Future Generations (Wales) Act 2015. The preparation of the Bridgend replacement LDP must therefore have regard to both the Wales Spatial Plan and the emerging NDF.

2.5 The Wales Spatial Plan defines a high-level planning framework for national and regional policies, and priorities broad themes including ‘promoting a sustainable economy’. It also identifies planning strategies for the six Welsh sub-regions. Bridgend CBC is included within the South East Wales (Capital region).

2.6 The Plan’s vision for a sustainable economy states:

We need an innovative, high value-added economy for Wales which utilises and develops the skills and knowledge of our people; an economy which both creates wealth and promotes the spreading of that prosperity throughout Wales; an economy which adds to the quality of life as well as the standard of living and the working environment.

2.7 To deliver this vision, the Plan makes clear that employment sites should be located near public transport, housing and infrastructure, brownfield land redevelopment should be prioritised over greenfield development and the rural economy should also be supported.

2.8 The vision for the Capital Region is it should function as a networked city region, focused on Cardiff, with an investment emphasis on high capacity public transport links to Cardiff/Newport. However, the Plan also identifies Bridgend Borough identified as having a particular role to play linking with the Swansea Bay city region, and Bridgend town is referred to as a cross-boundary settlement. Furthermore, Bridgend is the only town in the County Borough identified as one of the Capital Region’s 14 key settlements that should function as employment hubs, and which will be the focus for transport and other investment. The Plan also identifies the need for stronger links between the Valleys and the coast.

2.9 The Plan highlights that to support the growth of priority sectors identified by the Welsh Government, restructuring of the regional economy should include developing a stronger presence in high value services and the knowledge economy2. Major

[1] Timetabled for publication September 2020.

[2] The nine priority sectors identified by the Welsh Government are: Advanced materials and manufacturing, Construction, Creative industries, Energy and environment, Food and farming, Financial and professional services; Information and communications technologies, Life sciences; and Tourism.

private sector employment growth was considered most likely in the south of the region, with public sector strategic interventions more likely further north.

Planning Policy Wales

2.10 Planning Policy Wales – 10th Edition (PPW) sets out the land use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs) Welsh Government Circulars, and policy clarification letters, which together with PPW provide the national planning policy framework for Wales.

2.11 The primary objective of PPW – 10th Edition is to ensure the planning system contributes towards the delivery of sustainable development and improves the social, economic, environmental and cultural well-being of Wales, as required by the Planning (Wales) Act 2015, the Well-being of Future Generations (Wales) Act 2015 and other key legislation. The document promotes action at all levels of the planning process which is conducive to maximising its contribution to the well-being of Wales and its communities.

2.12 Figure 3 within PPW – 10th Edition identifies “Growing our economy in a sustainable manner” as one of five ‘Key Planning Principles’, encompassing the need for planning to “enable development which contributes to long term economic well-being, making the best use of existing infrastructure and planning for new supporting infrastructure and services”.

2.13 To implement the principles, the Welsh Government has defined a holistic suite of National Sustainable Placemaking Outcomes and framed PPW – 10th Edition around four themes which contribute to placemaking, including “Productive & Enterprising Places”. This theme focuses on planning for economic growth, defined in the context of planning as “the development of land and buildings for activities that generate sustainable long-term prosperity, jobs and incomes”.

2.14 In relation to economic growth and employment, PPW – 10th Edition sets out substantive requirements for new and replacement LDPs to:

- Adopt a placemaking approach to plan making, planning policy and decision making and encourage sustainable development;
- Co-ordinate development with infrastructure provision;
- Ensure site allocations comply with relevant national planning policies;
- Align jobs and services with housing wherever possible, so as to reduce the need for travel, especially by car;
- Reflect work with neighbouring authorities and other relevant stakeholders to plan strategically for employment land provision;
- Set out an evidence based economic vision for the area, including a broad assessment of anticipated employment change by broad sector and land use;
- Set targets on land provision for the employment uses (Classes B1-B8), showing net change in land/floorspace for offices and industry/warehousing separately, and protect these sites from inappropriate development;

- Include policies relating to development on existing employment sites to protect them from inappropriate development: – to encourage the regeneration and re-use of sites which are still suitable and needed for employment; – to control and manage the release of unwanted employment sites for other appropriate uses;
- Seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses;
- Deliver sites that provide appropriate job and training opportunities to disadvantaged communities;
- Promote the re-use of previously developed, vacant and underused land;
- Deliver physical regeneration and employment opportunities to disadvantaged communities;
- Guide and control economic development to facilitate regeneration initiatives and promote environmental and social sustainability; and,
- Seek to promote and facilitate development that will deliver physical regeneration.

2.15 PPW – 10th Edition also requires the preparation of new and replacement LDPs to be underpinned by an up to date and appropriate evidence base to support policy choices and land allocations for economic development. In particular, evidence should "demonstrate the suitability of the existing employment land supply as well as future provision in relation to the locational and development requirements of business" (para 5.4.7). As such there is a need to assess anticipated employment changes and land use together with estimates of land provision for employment uses, i.e. showing net change in land/floorspace (para 5.4.8). In doing so, PPW emphasises the importance of understanding prevailing market conditions and the needs of the surrounding region. Authorities are encouraged to identify potential networks and clusters of businesses, and the associated infrastructure, and where improvements are necessary.

2.16 One key policy shift in PPW – 10th Edition compared with the previous edition of national policy is a clearer focus on providing sufficient land to meet identified need and, in consequence, managing the release of unwanted or unsuitable historic employment land allocations. This marks a shift from the previous more flexible approach which encouraged the amount of allocated land to exceed the identified need. However, the 'conundrum' to consider is that whilst allocated sites that may be unwanted for employment uses, particularly in the short term, they may be located in areas of economic deprivation where regeneration is required.

Technical Advice Note 23 – Economic Development

2.17 Published in February 2014, TAN23 acknowledges wealth, jobs and income involves a very wide range of uses, and it is therefore important to look at the whole economy, albeit that the key land uses that have the main land use implications are the B class uses. The document reiterates higher level policy objectives, including where possible to use economic development to benefit disadvantaged communities, but it also instructs local planning authorities (LPAs) to recognise market signals and guide economic development to the most appropriate locations. It also reinforces the need to look cross-boundary, as planning for economic growth requires a 'larger than local' approach.

2.18 The key advice to LPAs is:

- Economic development should be guided to the most appropriate locations, rather than prevent or discourage such development. Three tests are identified for the consideration of site allocations:
  - are there better alternatives to meet the demand (not necessarily in the same LPA
  - the site's contribution to wider economic growth through direct job creation.
  - Any other specific contributions to policy objectives.
- A sequential approach to identifying land for economic uses should be applied to help build strong rural economies. This has two facets - aligning housing with jobs to provide opportunity for people to work close to home, and supporting the growth needs of existing business clusters. The advice notes the particular relevance of criteria-based policies in rural areas where the scale of need and sites are generally small (hence unlikely to be allocated) and can be specialist in nature. The potential of re-using existing rural buildings for employment needs is highlighted.
- Advice on the evidence base includes the scope for stakeholder consultation, the need to scale the evidence to both region and local scales. The evidence should inform the economic vision, responding to business requirements, inward investment opportunities and opportunities to improve the business environment, including identifying and filling any gaps in supply.
- The evidence should include assessment of the land use implications of possible future economic scenarios. These scenarios need to be realistic, consistent with plan aspirations including population and housing projections.
- To ensure future economic opportunities are not constrained and there is allowance for flexibility, competition and choice the employment land provision targets may be higher than anticipated demand.
- Persistent oversupply of employment land should be avoided and LPAs should assess the possibility of adverse effects on a specific site basis, so that allocated employment sites do not remain vacant for long periods and frustrate development for other land uses (PPW – 10^{th} Edition now emphasises this). The possibility for employment use will include the potential to attract large-scale inward investment.
- The advice sets out tests that should be applied to protect existing employment sites that accommodate uses that may conflict with sensitive uses but, are needed and would be difficult to accommodate elsewhere.
- Finally, the advice refers to the need for criteria-based policy(s) to manage unexpected change on non-designated or allocated sites.

Summary of Strategic National Policy Context

2.19 From the above review of relevant national policy and guidance it is clear that the emerging replacement LDP must ensure enough land in the right locations is identified so as not to constrain economic opportunity. Economic development should also be directed to areas where it will benefit disadvantaged communities, towards town centres and aligns jobs with housing and infrastructure. Additionally, planning for economic development should support the continued growth of nine priority sectors identified by the Welsh Government.

2.20 At the regional level, Bridgend is part of the Capital (Cardiff City) Region where growth in high value services and the knowledge economy are targeted. Cardiff and Newport are the main drivers of the regional economy. Bridgend town is identified as a key settlement and is the Borough's focus for economic growth and future investment.

Guidance for Preparing LDP Economic Development Evidence Bases

2.21 This Economic Evidence Base Report has been prepared in line with the expectations and requirements of the Welsh LDP Manual – 2nd Edition, the emerging Welsh Development Plans Manual and the Building an Economic Development Evidence Base to Support a LDP – Practice Guidance, as detailed below.

Local Development Plan Manual

2.22 The Welsh Government's LDP Manual – 2nd Edition (2015) provides useful guidance regarding the collation of evidence to support plan making. This report has also been informed by the emerging Welsh Development Plans Manual[3] which in due course will replace the current manual and cover both LDPs and SDPs.

2.23 These guidance documents make clear that evidence should underpin the identification of main issues and development the objectives through an iterative process. The evidence-gathering stage of LDP preparation should consider:

- Wider context – national, regional and sub-regional related policies and strategies
- Local context – policy and local strategies
- Available evidence and data
- Land needs and availability, including with reference to candidate sites
- Identification of issues and objectives

2.24 The emerging guidance generally reflects current best practice, including the PBA authored Technical Advice Note and the Governments advice on undertaking Employment Land Reviews.

2.25 For our purposes, one important part of the emerging manual warns against over-complicating the link between jobs and houses. The document clearly warns that

[3] initial draft released to LPAs in November 2018),

there is not 'always a direct correlation between jobs and homes'. This is soundly based advice as links between the two are complex and fluid. This is best summarised as a 'chicken and egg' dilemma: demographic models assume jobs will be available for a new population to make them 'economically active' in line with their assumptions, whilst economic models assume there is a population available to draw their labour from and so fill any 'jobs' shown in the model. However, in practice, if local firms and businesses do not demand more labour, then no amount of additional population will translate into more jobs or more 'employed persons'. If the job market does not demand more labour then people will have less motivation to migrate into the area as assumed, or people migrate but become unemployed or under employed. It is impossible to say with any certainty how the job market will respond. Therefore, for very good reasons the emerging manual discourages plan makers from assuming a direct correlation between jobs and houses.

Practice Guidance – Building an Economic Development Evidence Base to Support a LDP

2.26 The PG published in August 2015 alongside the LDP manual, identifies a step-by-step approach to building an economic development evidence base that was developed by PBA. Below, we briefly summarise the approach and comment on issues or data matters relevant to this study.

2.27 The evidence base starts with the whole economy, then the Authority's economic objectives and employment land policies reviewing how successful these have been. This analysis will point to the key policy issues needing to be addressed later in the ELR.

2.28 The next stage, the property market assessment has become increasingly central to the evidence base. Through consultation with commercial agents and a review of current market indicators the assessment will identify trends in the property market. It will identify where and in what form viable demand arises (and conversely where/what is no longer in demand) and gaps in the market. The outputs will be for the separate B use class activities, and disaggregated by unit size bands, and POSSIBLY identify different geographical markets. The results of our analysis are set out in the Property Market Review section of this report.

2.29 The audit of employment sites (development and existing sites) should broadly follow the exemplar appraisal proforma in the PG. This combines a review of potential policy and physical constraints with a review of market attractiveness to inform recommendations on the future use of each site.

2.30 For consistency with longer term data sets the employment sites' audit (refer to Appendix) is based on the Council's 2010 site audits, which pre-dates the PG, but the information gathered is consistent with the criteria set out in the PG. The Council's monitoring data does not disaggregate to land use class level, but does provide up to date take up and available area for the existing designated stock and committed sites. However, this is only available for aggregate B class from which we have identified office, industrial and warehouse change.

2.31 The audit identifies land suitable and available for continued/future employment use, and conversely land with no reasonable prospect of being used for employment use, and that can be released. The stock audit is a component of the next stage of work, the assessment of how much land is required to meet the forecast and trend-based projection of demand.

2.32 The next step is the quantitative assessment of future land requirements based on two alternative approaches - a past building completions (trend analysis) and a labour demand (an economic forecasting approach) approach. Both are undertaken so that an assessment can be made on which is the more credible. We follow the method outlined in the PG for both approaches, and the details are set out in the Demand Assessment later in this report.

2.33 Policy options are drawn and recommendations reached (including site specific recommendations) from a synthesis of the above evidence. The recommendations identify overall land use sector growth potential and spatial distribution. Then (assuming there is need) sites are identified for specific uses, and also sites that can be released.

2.34 The policy considerations together with the evidence feedback into the development of an economic vision. This should explain how the Plan will balance jobs and housing as required by PPW, and how the wider 'policy on' economic objectives for the Capital Region set out in the Welsh Spatial Plan will be delivered.

2.35 Where growth higher than that forecast is proposed, this must be evidenced with reference to interventions necessary to speed up growth. In this regard it will be important to review the economic strategies of neighbouring authorities to identify any potential conflicts, and to test future outcomes through alternative future employment scenarios.

2.36 Review of Adopted Bridgend LDP Employment Land PoliciesHaving reviewed the national strategic policy context and identified the implications of relevant guidance for preparing this report, this section now provides a review of employment related policies within the adopted Bridgend LDP (2013), which covers the period to 2021. The purpose of this review is to identify any inconsistencies with current / emerging national planning policy, and also to set the baseline for future identification and response to any contextual changes later in this report, such as changes in future demand for B class employment land.

2.37 Existing employment sites are addressed by three policies: SP9, an overarching strategic policy that identifies the land requirement and the strategic sites that will deliver some of this, REG1 that identifies existing and future employment land that will deliver the balance of the land requirement, and PLA1 which is concerned with the delivery of wider regeneration and mixed use sites that include twelve of the REG1 sites.

SP9 Employment and the Economy

2.38 To provide choice in the market for future employment growth, Policy SP9 identified a Borough-wide requirement for 120 ha of vacant employment land over the period to

2021. This supply is higher than the past trends-based demand figure and is justified on the basis that Bridgend has one of the highest rates of employment land take up in South East Wales and the need to ensure future growth is not constrained. The LDP identifies that between 2006-09 , 12 ha of supply had been developed and land availability reduced to 108 ha. The approach of offering a wide range of sites and premises employment land was consistent with national policy at that time, but is no longer as PPW – 10th Edition now requires only sufficient land to meet identified needs to be allocated.

2.39 The LDP's employment land supply is less than the allocated supply in the previous plan, the UDP, with some sites deallocated from employment to allow for a mixed-use approach involving an element of enabling residential development to deliver some employment on sites previously unviable for employment use. These sites, 12 in total are 'nested' within the wider PLA3 policy areas.

2.40 Four Strategic Employment sites are identified within the global 120 ha, to provide high quality employment on a total of 38 ha of land. These sites were allocated because they were considered by the Council to have potential to generate a large number of jobs, albeit considerable infrastructure investment is required before these sites could come forward. The allocation of these sites aligns with the national economic renewal policies to encourage inward investment. Preferred uses for these sites, reflecting national priorities, are: ICT, energy/environment, advanced materials and manufacturing, creative industries, life sciences, and B1 financial and professional services.

2.41 The property market review section that follows and the sites' assessment that underpins that review identify what progress has been made on the four strategic sites to date. In summary, whilst no land has been taken-up for employment uses to date, work is progressing on infrastructure upgrades and planning applications/permissions have been progressed.

REG1 Employment Sites

2.42 This policy allocates and protects a total of 37 sites for employment development and use. Seven are identified solely for B1, none of these are town centre, reflecting the Council's objective of providing opportunity for office uses across the Borough, and not just in the town centres. Dunraven House, Pyle for either B1/B2 but not B8 use, and all other sites are identified as suitable for B1, B2 and B8 uses. Five sites are considered acceptable in principle to accommodate waste treatment facilities.

2.43 A total of twelve of the employment sites spread across the Borough form part of much larger regeneration and mixed-use sites identified in Policy PLA3 with the objective of delivering socio-economic regeneration.

2.44 The 'interplay' between policy encouraging regeneration through the comprehensive mixed-use development of the wider area and this employment policy, is that the other uses will act as enabling development to help deliver the employment uses.

2.45 The property market review section that follows and the sites' assessment that underpins that review identify the anticipated sources of enabling funding, and consider progress in the period to date and whether employment remains an appropriate part of the mix, and a good use of public sector funding.

2.46 The REG1 sites provides a broad portfolio, most of which are established employment areas, approximately half of which had available land for employment use that as of 2009 summed to 70 ha of the total 108 ha. The Plan refers to '*some, albeit limited scope to develop new buildings for employment purposes within these areas' although the opportunity for redevelopment of underutilised or vacant buildings and premises still exists*'[4].

2.47 The above statement acknowledges the risk in the policy approach; delivering employment on these infill parcels and/or through redevelopment will be challenging, and a key purpose of this ELR is to review what change there has been in these vacant areas and areas /buildings with potential for redevelopment. This is discussed in both the Property Market Assessment section that follows, and is considered in detail in the past trends analysis in the Demand assessment chapter.

REG2 Protection of Identified Employment Sites

2.48 A restrictive policy that restricts the permitted loss of employment land or premises to only sui generis uses appropriate for employment land, and those uses that are complimentary or ancillary to employment uses. The supporting text highlights that available employment sites close to the strategic road network are vulnerable to reuse/redevelopment for non-employment uses.

2.49 Whilst this is an essentially rigid policy, the flexibility built in for sui generis uses (builders' merchants and motor repair) and complimentary uses such as gyms and creches, are important in making employment areas more appealing to the workforce and therefore employers, which improves the attraction and resilience of employment areas to future change.

REG3 D2 Class Uses on Employment Sites

2.50 Allows D2 uses to replace employment uses where the proposal satisfies a number of criteria. The key ones being a clear demonstration that a sequential approach has been applied to site identification, the building was vacant for a minimum of two years and subject to active marketing and the use would not generate a negative impact on the integrity of the wider employment area.

REG4 Former Stormy Down Airfield

2.51 A site-specific policy allowing temporary employment uses in the green industries sector on the former airfield ahead of future mineral extraction. The redevelopment of the airfield site began on site in 2011, since when a number of renewable energy facilities have been built. The site is also used recycling and landfill material handling. Recent decisions have provided 30-year temporary permissions for an energy from waste facility and the landfill facility.

[4] Bridgend LDP para 5.1.11

PLA3 Regeneration and Mixed Use Development Schemes

2.52 This policy adds the site-specific detail to the LDP's primary Strategic Policy objective of producing regeneration-led developments distributed in accordance with the Spatial Strategy. Twenty brownfield and under-utilised sites are identified within defined settlements / Strategic Regeneration Growth Areas for a mix of uses, twelve of which incorporate employment sites (REG1 sites).

2.53 The Policy states that the detail for the development of each PLA3 area will be identified through a masterplan or development brief, but the LDP provides indicative uses and land apportionment. The location and scale of all these sites provide opportunity for comprehensive development over the Plan period.

2.54 The Strategic Regeneration Growth Areas taken together account for most of the 70 ha of employment land available Borough-wide (as recorded) in 2009. As referred to above, the benefit of this approach is that opportunity is provided for employment to come forward through the development of other viable uses that subsidise the unviable employment uses as part of a wider package including community facilities, services and infrastructure.

2.55 The LDP identifies the land components of the mixed-use areas, which could alter to reflect changes in priorities. The key point is that some form of funding is required to deliver all of these sites. For example PLA3(2) North East Brackla identifies scope for 8.2 ha of employment land amongst 32 ha of developable land and has JESSICA funding, but could also draw on Section 106. Other areas have access to the Western Valleys Regeneration Fund, in addition to S106 funding.

2.56 It should be noted that if the Borough's spatial strategy changes from the current four Strategic Regeneration Growth Area approach, and dependent on the findings of this study, the amount and distribution of employment land may also need to change.

Summary

2.57 The 2013 LDP designates employment sites through policies SP9 and REG1 (with twelve of the REG1 sites 'nested' in PLA3 regeneration sites), and allocates 120 ha / 108 ha of land for future employment use that was significantly more than the identified need. The changes to national policy means there needs to be a stronger balance between the supply of land and what is needed. Taken together the SP9 and REG1 sites offer a range and choice of employment sites to support growth in the local economy.

2.58 This study therefore needs to review how much employment has been delivered in the Plan period to date, set against the annual 6.3 ha requirement, and this will be reviewed through the past take up demand analysis. We know from published AMRs that this level of development has not been achieved in recent years, and this study explores why this is the case.

2.59 Once the quantum of future demand has been established, the supply of land needs to be reviewed to determine if there is sufficient land in the right locations to meet the identified need.

3 SOCIO-ECONOMIC BASELINE

Introduction

3.1 The purpose of assessing the Borough's socio-economic baseline is to understand its role and function now and how this could change in the future. As recognised in relevant guidance (see Section 2), this is the important first step as without an understanding of the baseline we cannot know either what policies are appropriate nor their likely effects. For example, whether the residents are already fully employed in high value sectors within the Borough or need to commute elsewhere to work and bring home higher wages than available locally will guide the policy approach.

3.2 Here we have the 2010 Borough ELR as a baseline. It was undertaken in the midst of the economic downturn, but we can usefully make comparison with 2010 wherever possible, reviewing what that report referred to as the *'issues and messages'* and how Bridgend's economy has changed in the years since. We also compare against South Wales and national data wherever possible.

3.3 We review the characteristics of the Borough's economy and population, starting with the whole economy now and in the future and B class jobs and floorspace. We then look at the population's economic characteristics such as economic activity, earnings and commuting flows.

3.4 Our analysis mostly uses data from Experian Economics[5] and the ONS from the National Online Manpower Information System (NOMIS) and the Business Register and Employment Survey (BRES).

Whole economy

3.5 As required by Guidance we start our assessment by looking at the whole economy before looking at only the employment uses. This is important because most jobs tend to be outside of the traditional B classes and so the growth, or decline of the B classes is only one feature of the wider economy that the Borough needs to consider.

Sector structure and size

3.6 The pie chart below identifies the number and proportion of jobs in 2016[6] in the eleven broad employment sectors. Later we compare the proportions with the comparator benchmarks.

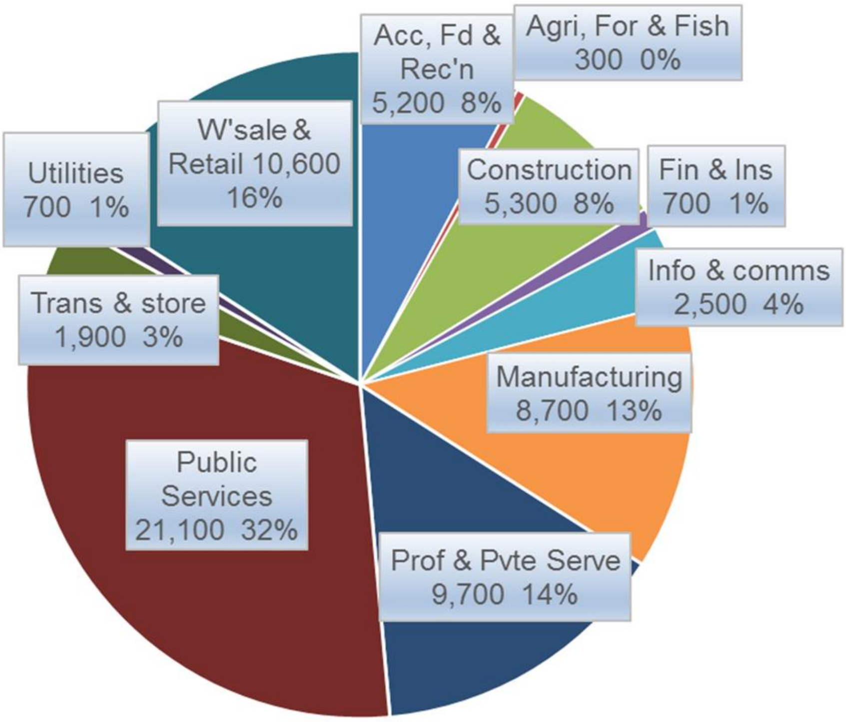
3.7 The whole economy supported 66,700 jobs in 2016, with almost one-third in the public sector. Sectors that largely occupy B class floorspace have the next largest share – warehouse/retail[7], professional and private services and manufacturing.

[5] Experian Economics are one of the three main forecasting houses in the UK. The others being Cambridge Econometrics and Oxford Econometrics.

[6] 2016 is the latest year to be based on actual data rather than a forecast

[7] Retail is A1 use class, but warehousing is B class.

Figure 3.1 Bridgend workforce jobs, 2016

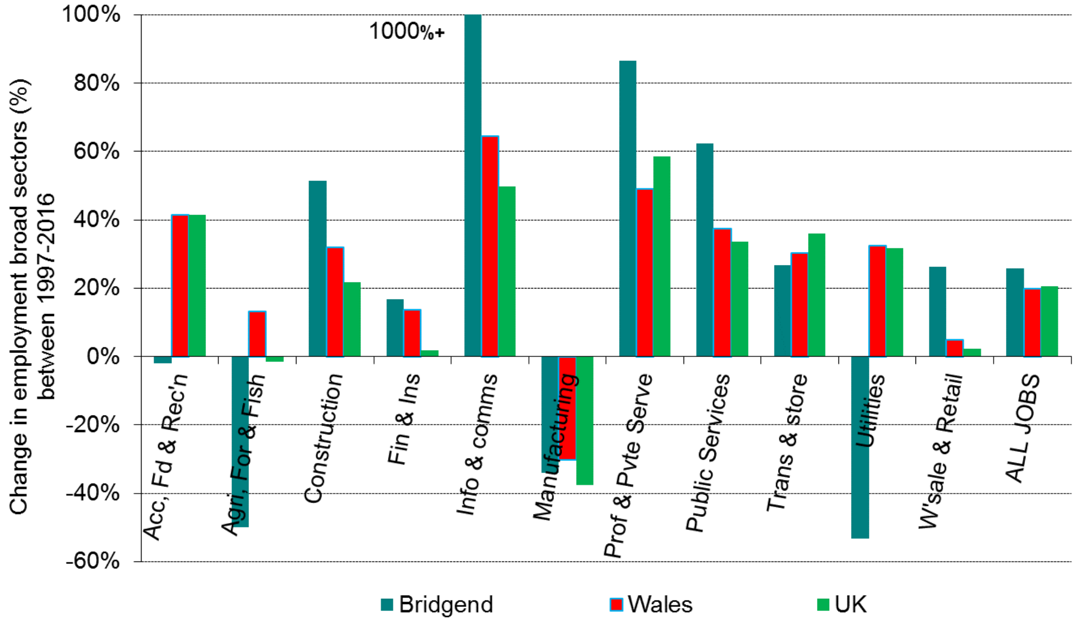


Source: Experian Dec 2018

3.8 **Error! Reference source not found.** below compares sector change over the 20-year period for Bridgend and Wales and the UK.

3.9 We can see that growth in large sectors such as professional services private services, construction and warehousing/retail in Bridgend has increased more rapidly than the national benchmarks. Information and communications has increased dramatically, but from a very low base. Change in the other direction has been most extreme and much faster than the benchmarks in agriculture and utilities. Manufacturing has lost jobs, but not out of kilter with the national benchmarks. Overall change in total job numbers (as shown in righthand columns) has been higher than for Wales and the UK, so a positive story.

Figure 3.2 Change in employment 1997- 2016

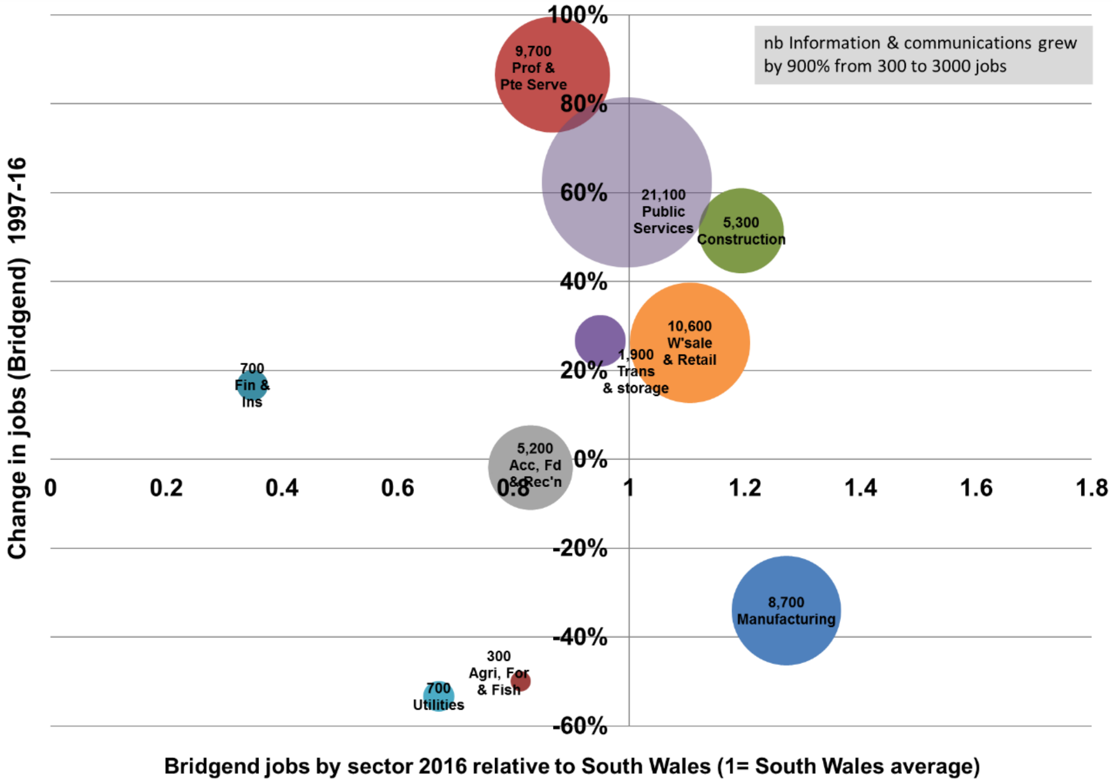


Source: Experian Dec 2018

3.10 Looking more closely at Bridgend job sectors, below we compare change in jobs over the 20-years to 2016 against a south Wales benchmark.

3.11 The number of public sector jobs in Bridgend matches the regional average (on the average “1” ratio). Jobs in wholesale/retail and construction are more numerous than the benchmark, but professional services jobs that have almost doubled in number over the past 20-years, are under-represented, albeit only marginally. The huge growth in information/comms is off the scale but this is a small sector and could simply be one or two new firms locating in the Borough, potentially call-centre related employment . Manufacturing jobs are more numerous than any other sector compared with the regional average.

Figure 3.3 Location Quotient - Bridgend



Key: Number in circle = jobs in 2016, Horizontal (X) axis = proportion of jobs relative to benchmark and Vertical (Y) axis = change in jobs in identified area between dates. Source: Experian Dec '18

Labour supply characteristics

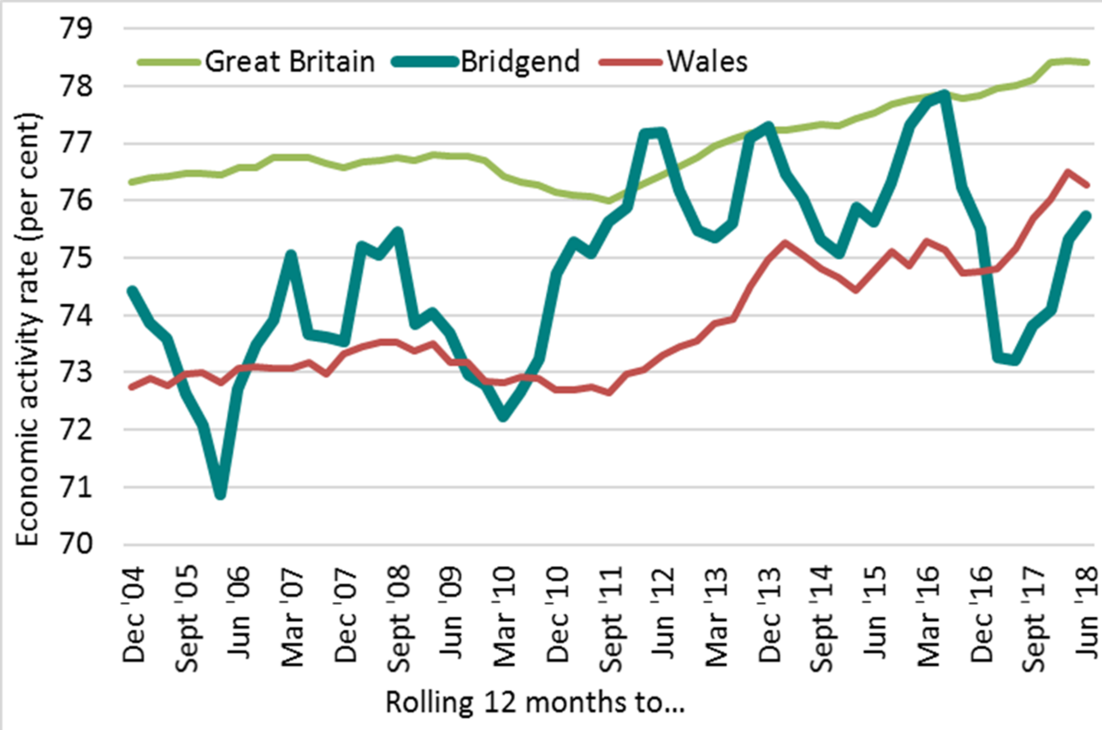
Economic activity

3.12 **Error! Reference source not found.** below shows economic activity rates[8] have been generally lower for Bridgend and Wales compared to Great Britain. The dip in rates during the economic crisis is evident in the data.

3.13 Whilst the relatively small data sample for Bridgend shows much more volatility that the much bigger and 'smoothed' national data, Bridgend has generally performed better than the average for Wales

[8] Economically active means people who are either in employment or unemployed, and the rate is expressed as a percentage of all people.

Figure 3.4 Economic activity

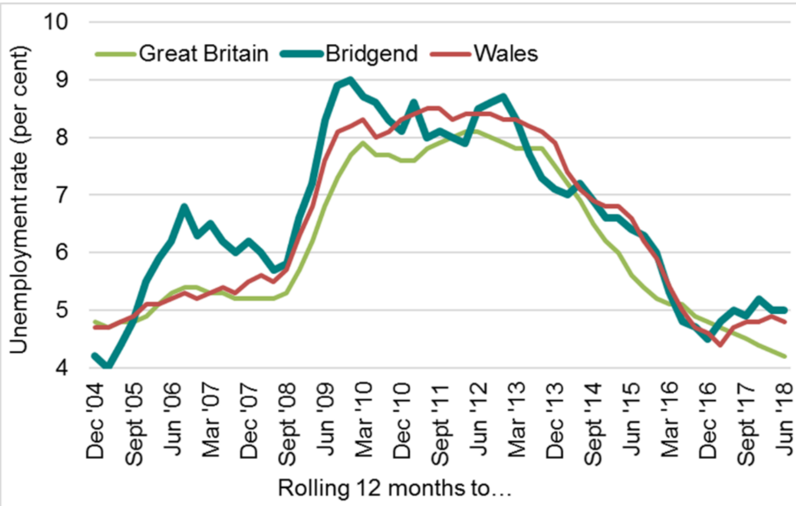


Source: ONS annual population survey

Unemployment

3.14 Unemployment rates rose a little higher for Bridgend in the economic crisis and the 2006/7 period compared to GB/Wales, but are generally very similar to the national benchmarks.

Figure 3.5 Unemployment rates



Source: ONS annual population survey

3.15 Overall, low unemployment and reasonable economic activity rates suggest the Borough is starting from a good position – with those who may want a job having access to one. The Borough is not starting from a shortage of jobs. This analysis only strengthens the warning noted above – that a significant increase in the number of jobs in Bridgend must be coupled with a boost in the labour supply and so homes.

Earnings

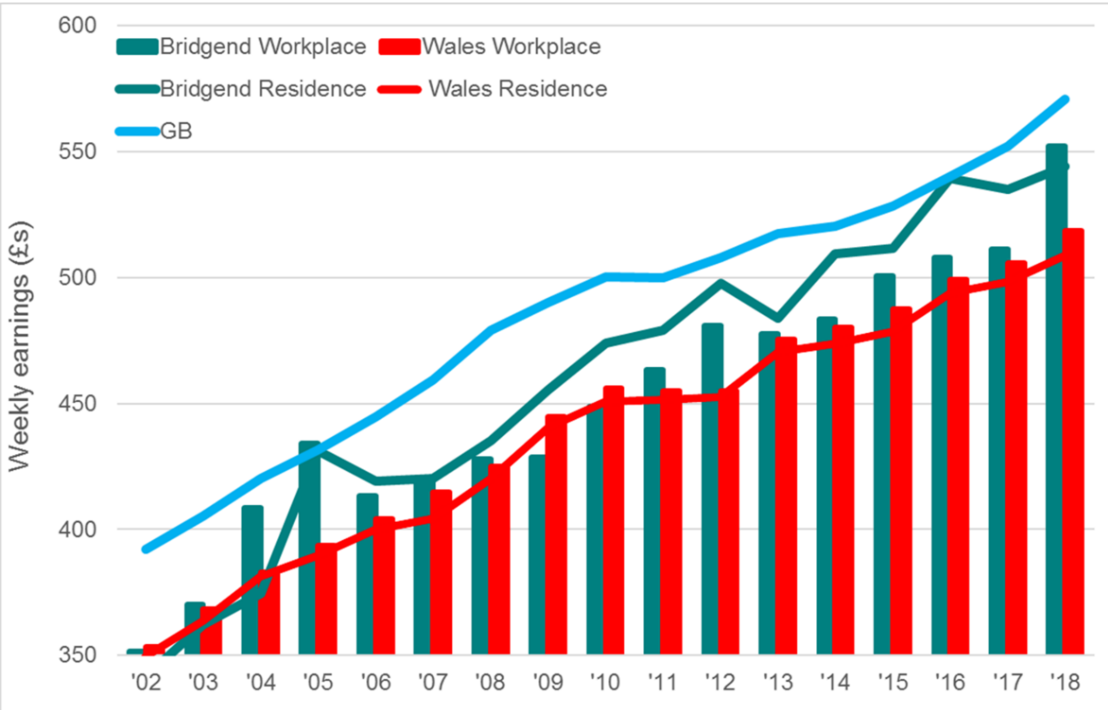
3.16 Above we have found that there are enough jobs in total. Here we look to see whether those jobs pay a reasonable wage.

3.17 Comparing residence and workplace earnings allows us to see if average wages are higher in or out of the Borough. This gives us an idea of the quality of jobs and with commuting data overlain we can identify the scale and direction of in and out flows for work. **Error! Reference source not found.** compares workplace and residence for the Borough and Wales, and also shows GB earnings, which is obviously a combined workplace and residence figure.

3.18 Residence-based earnings have been higher than Borough workplace earnings since the mid-2000s (except for the latest data where workplace 'spikes'). This is different to the Welsh national position where workplace earnings consistently, albeit marginally have exceeded residence earnings over the past decade.

3.19 Looking at the data in general terms, the gap between workplace jobs in Wales, Bridgend and GB has remained relatively consistent over the entire period. However, the wages for Bridgend residents has risen post-crash to be close to the GB average, which suggests this has been boosted by wages from commuters more than those living and working in the Borough.

Figure 3.6 Earnings – workplace and residence



Source: ONS Annual survey of hours and earnings

Commuting

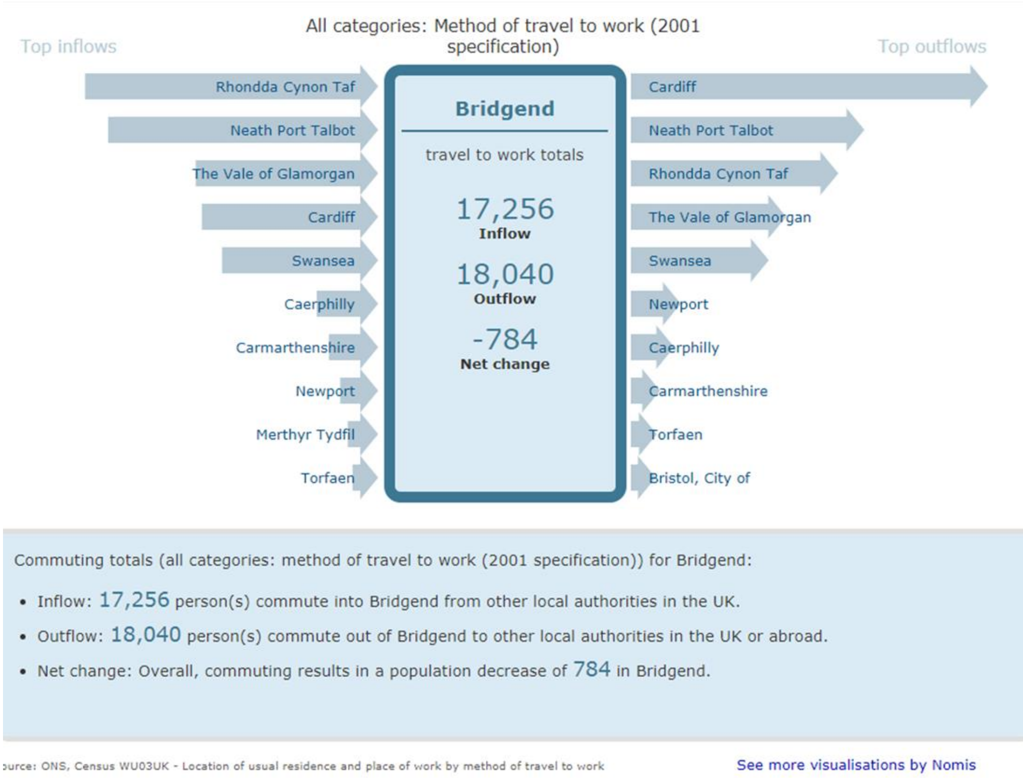
3.20 Commuting is a complex issue and cross boundary commuting is not automatically unsustainable. In some parts of Bridgend, and its neighbours the most sustainable location for people to work maybe in a neighbouring administrative district. For example, Port Talbot (to the west) is equidistant for many Bridgend Borough residents as is Bridgend town. So in our analysis we focus on 'net flows' with a view to ensuring that there are generally sufficient jobs for any resident who may want – accepting that some will always choose to commute across boundaries.

3.21 Commuting flows indicate the relative attraction and quality of jobs in an area. Areas with high quality productive jobs tend to be net importers of commuters. Commuting data is confined to census years, and thus at this point we are using the now rather dated 2011 census data, but nevertheless it is useful to identify the direction of the key out-flows.

3.22 Flows in and out of Bridgend are almost balanced, with a marginal outflow. **Error! Not a valid bookmark self-reference.** shows the influence of Cardiff, which is by far the main destination for commuters from Bridgend. Whilst the commuting data does not identify what type of jobs are attracting the commuters into Cardiff, we do know from other data (see the Location Quotient chart at **Error! Reference source not found.**) that Bridgend has less professional and private services jobs than the South Wales average, and this may be because jobs in this sector are generally to be found in Cardiff as opposed to Bridgend. We also know earnings are higher for those who work outside of the Borough. The LQ analysis indicated that in other job sectors Bridgend is comparatively well provided for, thus the evidence strongly suggests the relatively high level of commuting from Bridgend to Cardiff is for the higher paid professional / private services jobs.

3.23 These would align with our evidence above – where we found a small disconnect with resident wages and earnings. For the development plan we don't consider this is problem because the labour market is generally balanced and commuting to larger cities perfectly normal and part of their agglomeration economies. In our mind this only because a problem where residents are required to commute for work because there are no opportunities locally.

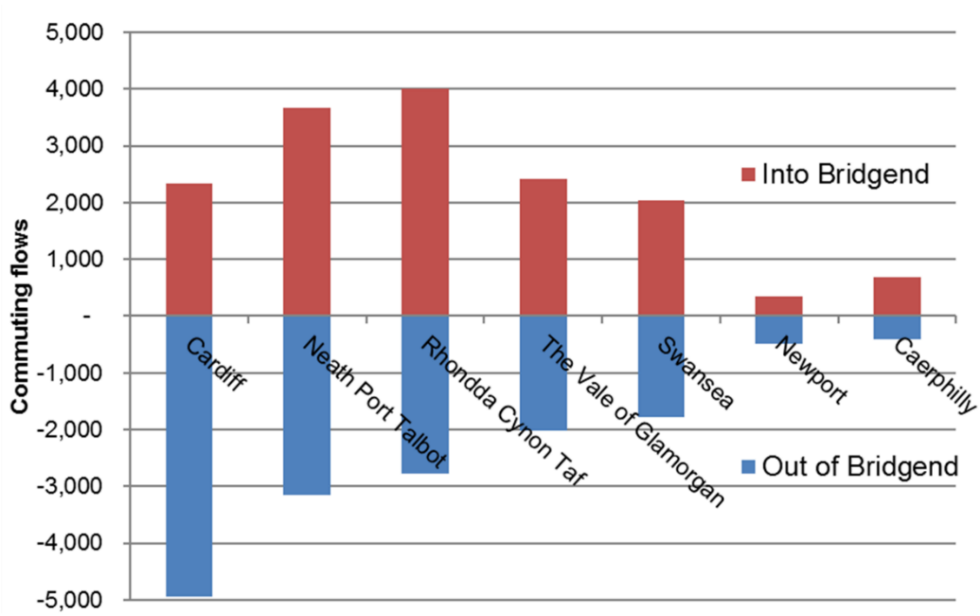
Figure 3.7 Commuting to / from Bridgend



Source: ONS 2011 Census table WU03UK Location of usual residence and place of work

3.24 Our chart below provides the job numbers to add to the figure above, and illustrates that some 5,000 residents commute to Cardiff. In all other respects Bridgend has a positive commuting story, and it may be that the scale of the Cardiff economy and office market means that it will be impossible to reverse this, but market analysis and a targeted approach may clawback some office based jobs

Figure 3.8 Bridgend commuting flows – in - out



Source: ONS 2011 Census table WU03UK Location of usual residence and place of work

3.25 The data suggests that overall there are enough local Bridgend jobs for the number of local working residents. Flows between Bridgend and its neighbours are generally balanced although there is evidence of a flow from Bridgend into Cardiff, with the net balance made up by short distance commuting into Bridgend from near neighbour Council areas we don't consider the flow into Cardiff to be of concern.

Businesses

3.26 In **Error! Reference source not found.** below we compare the latest business count data in the Borough sub-areas with the proportions identified in 2009.

3.27 Overall, the number of businesses has changed very little since 2008 when according to the 2010 ELR 3,725 businesses were recorded by the ONS. ONS time series data currently starts in 2010 and shows there were 3,180 businesses, which if consistent with the data reported in the ELR (both repot to be a measure of 'enterprises') shows a dramatic drop in numbers during the economic crisis.

3.28 The data indicates the policy objective to support job opportunity in areas of the Borough away from Bridgend has been successful, as a decade on Bridgend's overall share of the businesses has reduced and Porthcawl's share has gone up, while the other areas are generally unchanged.

Table 3.1 Distribution of Businesses – comparison 2009-2018

Sub-area	Businesses in 2018	Proportion of Borough total 2009	Proportion of Borough total 2018	Change 2009 - 2018 Absolute	Change 2009 - 2018 Proportion
Bridgend	1,405	42%	39%	-3%	-7%
Porthcawl	630	13%	17%	4%	34%
Llynfi	335	10%	9%	-1%	-7%
Pencoed	295	8%	8%	0%	2%
Valleys G'way	330	10%	9%	-1%	-9%
Pyle	405	11%	11%	0%	2%
Ogmore	110	3%	3%	0%	2%
Garw	100	3%	3%	0%	-8%
	3,610				

Source: ONS, UK Business Counts, and Table 3.5 2010 Bridgend LDP Employment Land Review

Summary

- We have looked at the whole economy, but focused on the B class because unlike most other classes, job change is related to economic performance and leads to a direct requirement for new floorspace / land. Whereas health, teaching or leisure jobs tend to be absorbed in existing facilities.
- This has shown that Bridgend's economy is doing comparatively well. A comparatively large manufacturing sector and info/comms albeit modest in

size has seen strong growth over the past 20-years. But the whole economy has grown at a faster rate compared to Wales and GB.

- The improving position is linked to population characteristics such as the rise in the proportion of economically active, unemployment is aligned with national averages. Whilst earnings are higher for those who work outside the Borough, the difference is not vast, and indeed the most recent data (admittedly likely to be a 'spike') shows workplace based earnings are higher than residence based.
- We have also looked at a number of features related to population and the supply of labour in Bridgend. We have discussed them as individual features of the local economy but in reality they are inter-linked.
- Taken as a package the data suggests the Bridgend labour market is generally in balance with the demand for labour. Economic activity rates and unemployment track somewhere between the Welsh and UK averages. Cross boundary commuting is balanced. Overall there is no sign that the job market is 'stressed' and labour demand (from firms looking to employ people) is generally satisfied with the size and structure of the current population.
- So, the Council is starting from a strong labour market / labour supply position with no quantitative deficit to address.
- Looking forwards, should the Council adopt, as a policy aspiration, a strategy to increase the number of jobs in the economy then this cannot be done without relying on a new supply of labour. There is only very limited 'slack' in the labour market at the moment. As a policy aspiration a desire to boost the size of the local economy, measured in terms of jobs (as opposed to productivity) will require a boost to housing and labour supply. Given the area is generally free of strategic constraints it is sensible, and positive, to give active consideration to a joined up approach of delivering more homes and (land for) jobs in tandem. There will be parts of Wales (and England) where constraints limit other council ability to respond in such a positive manner. There is no guarantee that boosting housing and labour will result in more jobs – but it is certainly the case that should new homes not be provided the job economy will not be able to grow.

4 DEMAND FOR EMPLOYMENT FLOORSPACE

Introduction

4.1 Above we have established that the Borough is starting from a reasonable position of low unemployment and reasonable earnings. To assess how much land is needed in the future the Welsh Government Practice Guidance9 promotes two approaches to be followed.

4.2 This chapter reviews both these approaches:

- A projection of historic trends (Past Trends approach). This is based on data sourced from the Councils monitoring data and cross checked with data from the Valuation Office Agency (VOA)
- A projection based on 'Labour Demand' which in this case is informed by an economic forecast from Experian

4.3 Both of these approaches are 'baseline' or business as usual approaches. This is because they largely project forward the past without any added 'policy on' factors.

4.4 The first approach (Past Trends) literally projects forward the past. The forecast approach relies partly on past trends but also applies an external view as to how this may change in the future. So, while the forecast approach is not literally a projection of the past it is still informed by past performance. The second, labour demand, is still informed by past trends (strengths and weaknesses) but is moderated top confirm with the economists view of which sectors will grow, shrink and be attracted to Bridgend.

4.5 We also provide a view based on 'Labour Supply'. This is because here the replacement LDP is expected to provide more new homes than the Welsh Government's current principal trend based demographic projection suggests are needed, and it follows that the size of the available labour supply may be higher than under the principal projections.

4.6 We note that this study is prepared in challenging time; with the UK leaving the EU and uncertainty surrounding the automotive sector. However; it is important to note that the denominator of this evidence base is land and floorspace. So, should space be vacated then, providing it remains protected from alternative uses, it will be available for re-occupation or redevelopment. It does not therefore automatically follow that this uncertainty generates a need for a new supply of land. However, other non-planning interventions may be needed to stimulate demand to take-up or re-occupy sites.

[9] Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan 2015

Past trends

4.7 As guided by Planning Guidance we look firstly at historic development rates for commercial floorspace. Past take-up can be projected forwards to arrive at the amount of land in the next plan.

4.8 We have two sources of data to inform this analysis. Firstly, the Council monitors land take-up on a regular basis – generally each year ending in August.

4.9 Secondly, we can cross check this data with taxation based floorspace data from the Valuation Office Agency.

Council monitoring data

4.10 At the time the last plan was prepared the County Borough had seen take-up average around 6.3 ha per year. This was extrapolated to generate a 'need' for 88.5ha of land over a 15-year period[10]. This was then further increased in the plan to allow for modest over provision for market choice and flexibility.

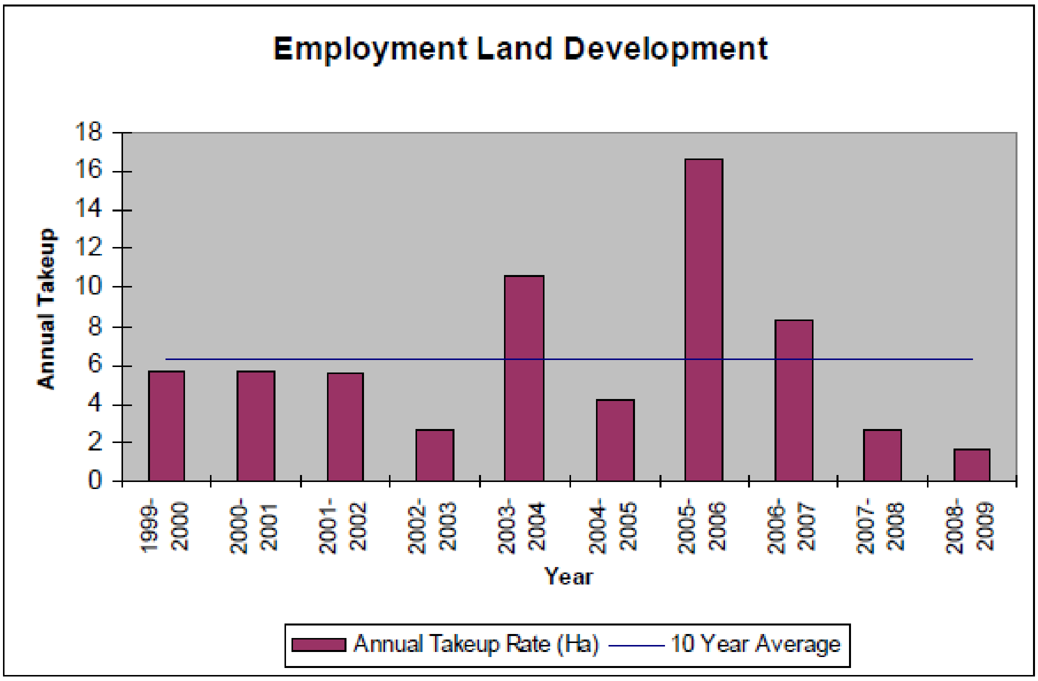
4.11 From our analysis of the Council's data we think that this may be an exaggeration of what land was actually taken up over the period. The data is strongly influenced by a high take-up year 2005/6 when the evidence base suggested nearly 18 ha of land was taken up[11]. The ELR suggests this was bolstered by strong take-up at Bocam Park. But that site is much smaller than this and still not fully developed.

4.12 The 'raw' data suggests that 10 ha of the take-up 05/06 related to 'land at Tondu'. Our understanding is that this was released for housing, and some retail and not employment. So, we think some of the past data may have included the take-up of regeneration sites that were not delivered for employment.

[10] See section 7 of the 2010 ELR. The calculations are not quite exact because they were updated to reflect actual take-up as the plan was prepared.

[11] Figure 4.4 of the 2010 ELR

Figure 4.1 Past trends employment land development data



Source: Figure 4.4 Vacant Employment Land Development, 2010 Bridgend LDP ELR.

4.13 We have also used the Council's data to look at take-up in the final years of the previous plan – post the ELR, but prior to 2013 when the Council refreshed the monitoring system to align with the new plan. This data suggests that in the years 09/10 take-up was marginally positive, but in 10/11 and 11/12 take-up was actually negative; the 'available land' reported increased slightly. This would not be unexpected given these years are strongly recessionary, but it provides a further reason to treat the 6.3 ha in the adopted plan with caution.

Table 4.1 Change in employment land availability 2009-2012

	As at: Oct 2009	**Oct 2010**	**Oct 2011**	**Oct 2012**
	Ha	Ha	Ha	Ha
Total area	731.79	731.79	732.6	732.6
Change in total area		0.00	0.81	0.00
Available area	206.04	205.33	206.72	207.71
Take up		0.71	-1.39	-0.99

Source: BCBC raw Employment Land Availability data

4.14 The table below shows the past take-up for the five year, post recessionary period 2014-18.

Table 4.2 Past take-up 2014-18

	2013/14	2014/15	2015/16	2016/17	2017/18	Total	Average per month	Average per annum
Developed area (ha)	1.63	0.45	1.52	2.33	3.73	9.66	0.17	2.00

Source: BCBC (Planning & Economic Development Unit): Annual Employment land availability survey. Note 2014/15 data is for 10 months (0ct-August) so we calculate annual average grossing up the 10 months to 12. Data is 12 months prior to the year – i.e. change 13/14 and 14/15 etc.

4.15 While lower than the estimate of past take-up in the adopted LDP, the period 2013/14-17/18 was one of broad economic prosperity across the UK, including in Bridgend. It was also a period when the 2013 LDP provided a robust supply of land to meet any market demand, so there is reason to suggest that the take-up recorded in this period was constrained or reflected a weak economy.

4.16 Also, at the time of writing unemployment is low, having fallen dramatically from the recession years and lower than the higher take-up years used to base the adopted plan. So, it is reasonable to conclude that recent take-up data and future take-up will remain lower than that used to inform the adopted LDP as there is much less slack in the Bridgend economy to drive higher take-up of land.

Valuation Office Agency data (VOA)

4.17 As a cross check to the Council's data it is useful to also look at official floorspace statistics. These are prepared annually by the VOA and are generally considered to be robust because they relate to taxation data.

4.18 The VOA captures all economic floorspace; both within allocated sites and outside. It also provides a view between industrial (including warehouse) floorspace and office floorspace.

4.19 Usually, compared to Council monitoring data it provides a more accurate view of 'net demand'. This is because Councils often struggle to accurately record the loss of land and floorspace. Often a developed site is demolished and cleared of an 'employment' use prior to seeking planning permission for a new use. But such changes are recorded in taxation-based data – it is not in the landowner's interest to pay rates on space they have demolished.

Industrial Floorspace

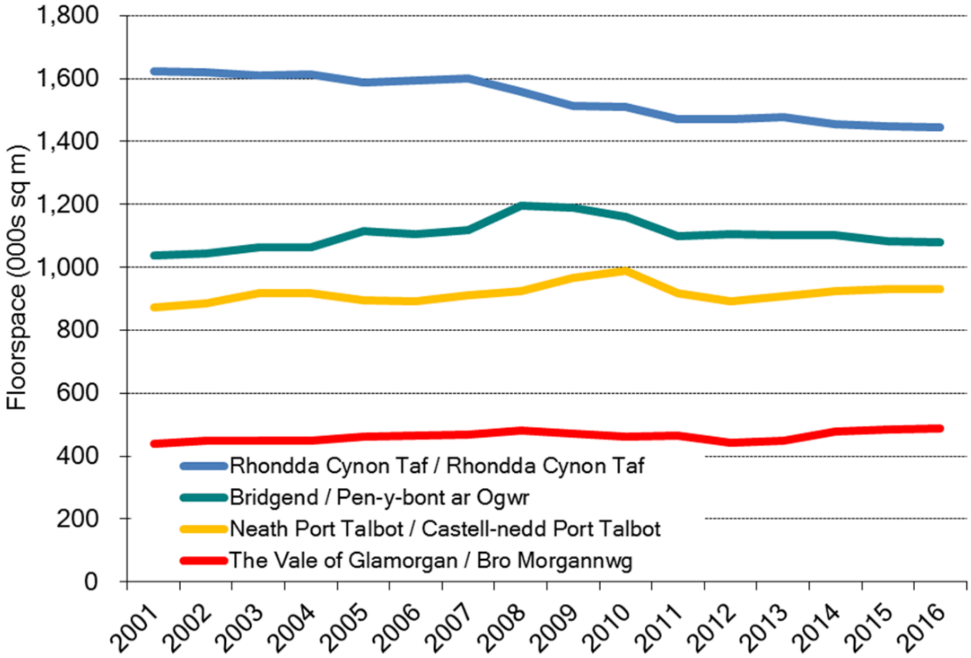
4.20 Looking at industrial floorspace the taxation data shows almost no growth in floorspace between 2001 and 2016. The stock of space is largely stable over the period.

4.21 The data shows the stock of floorspace growing slightly up to 2010 before falling back in more recent years.

4.22 This may partly explain why the adopted plan evidence showed a higher rate of land take-up; it was informed by a period where Bridgend grew its industrial floorspace stock. But more recent data shows a much weaker take-up trend – the VOA data suggests floorspace has actually been lost from the stock.

4.23 It also suggests that where land has been taken up in the past this positive take-up has partly been offset by losses not picked up in the Council's AMR.

Figure 4.2 VOA Industrial Floorspace Stock for Bridgend and Neighbours (01-16)



Source: VOA Floorspace statistics

Office floorspace

4.24 Looking at office space the picture in Bridgend is very different. There has been strong office floorspace growth. Over the same period the stock of office floorspace grew from 60,000 sq m up to 100,000 sq m.

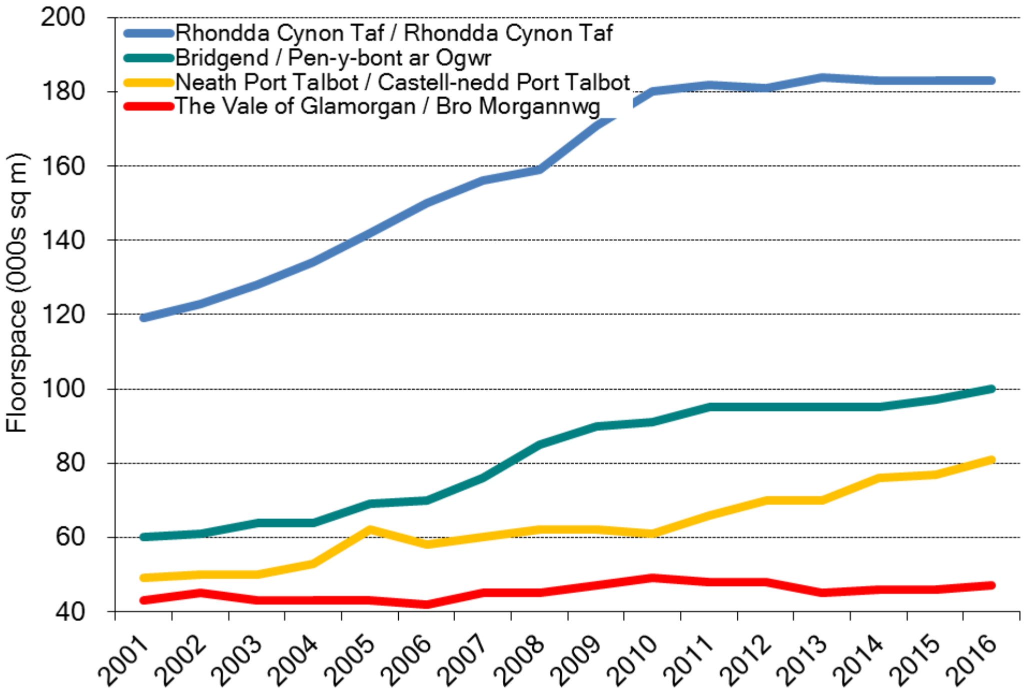
4.25 Growth has been much slower in recent years – most of the growth took place over the years up to 2010/11. This again would correlate with the old local plan evidence on past take up, which showed higher land take up in the past, and the much lower take up in more recent years according to the Council data.

4.26 One significant caveat to note is that in recent years the way office occupiers use their property has changed significantly. Modern office spaces have been reconfigured to increase employment densities and increasing use of homeworking now means that many firms do not need to provide one desk per worker. In many parts of the UK we have seen office-based employment increase without any increase in the office stock.

4.27 There is some evidence that this has happened here – we know that while the stock of office space stopped growing post 2011, employment data (from Experian) shows that the Borough still added a few thousand more office-based jobs. The ICT and Private and Professional Services sectors added neatly 2,500 jobs post 2011. Conventionally we would need at least 30,000 sq m of new floorspace to accommodate those jobs (@1:12 sqm). So, it is likely that some were absorbed into the existing stock while others in vacant space.

4.28 This factor may also help explain why the current local plan is exaggerating the demand for land. When rolling forward past take-up the plan did not make any allowance for owners/occupiers to use their existing office stock much more efficiently.

Figure 4.3 VOA Office Floorspace Stock for Bridgend and Neighbours (01-16)



Source: VOA Floorspace statistics

VoA summary

4.29 The data suggests that the Council ought to be cautious about projecting forward the past land take-up because, while 2 ha of land has been taken up according the Councils records in recent years, this has not yielded additional floorspace.

4.30 This implies that a roughly equal amount of land has been lost from the stock as gained.

Summary

4.31 The adopted Bridgend LDP (2013) adopted a Past Take-up approach to estimate how much employment land was needed. At the time, past take-up was estimated at 6.3 ha per annum and so, over a 15-year plan, when updated to take into account more recent actual take-up, suggested 88.5 ha of new land was needed. This was before any decision to over-provide land in addition to 'need'. However, looking at more recent data actual past take-up has been much less. More recent data suggests take-up is running at around 2 ha per annum.

4.32 The VOA data shows that industrial floorspace has been stable over the long period (from 2001), but slightly negative in the short period (from 2011). The same data shows that office floorspace growth was positive over the longer period, but stable in the short term.

4.33 Drawing together this review of Past Take-Up and VOA data suggests that the next LDP period will require less land to be allocated. Projecting forward the most recent data would suggest 2 ha per annum and within this estimate there is scope to manage windfall losses without any further adjustment required.

Labour Demand - economic forecasts

4.34 The second approach suggested in the Welsh Guidance is one based on Labour Demand. Although cited as labour demand this approach is also described as one based on economic forecasts. This is because the economic forecast estimates the demand for jobs and so labour over the period concerned.

Method

4.35 To quantify the demand for offices, industrial space and storage and distribution to 2033 we start with the raw data, which is provided by the economic forecasters in activity sectors (38 for Experian). We then translate these sectors into the three land use categories using our sector-to-space mapping technique (an explanation of this is provided at in the appendix).

4.36 The base year used for the forecasts is 2018.

4.37 Once the job numbers are identified for the B class activities, we then apply specific employment densities sourced from the 2015 HCA report Employment Density Guide. The final step is to turn net demand for floorspace into gross demand by accounting for changes in supply that are in the planning pipeline – planning permission commitments and site allocations.

4.38 We then sense test the outcomes by comparing the jobs / floorspace forecasts from the forecasting house for each land use, and consider these data in respect of other information about the markets, such as the information from the property agents and also in respect of storage and distribution we examine future forecasts of freight movement.

Job demand

4.39 The first step is to look at forecast job change over the next plan period. We start by looking at total jobs, then detailed sectors; before adding these together to provide a view by planning Use Class.

4.40 The detailed sector analysis is useful because it provides a view as to the possible qualitative demand for land and floorspace where different sectors in the Borough have different qualitative demands.

Total Jobs

4.41 Across all sectors job growth is forecast to be very modest – only 2,400 more jobs in 2033 compared to 2018.

4.42 As noted in the introduction it is important to note this this is a 'job' number and should not be confused with the number of employed people or 'employment' in the Borough. The number of 'employed people' is actually stable over this period – almost all the new jobs are the product of the switch into part time working and an increase in 'double jobbing' – a feature where one person has two (or more) part time jobs.

4.43 Such a finding, that job growth is low, is not unusual. As we discussed in the socio-economic chapter to this report unemployment in Bridgend is reasonably low and economic activity rates between the Welsh and UK averages. In addition, commuting flows are generally balanced. This suggests that the local economy is approaching 'full employment' and there is limited quantitative 'slack' in the boroughs labour supply. This is also a feature seen in the national (UK) economy which is widely recognised to be running at 'full employment'.

4.44 In this context it is important not to view a 'low' job growth number as a negative feature of the economy. Nor to view 'net additional' jobs as a key metric going forward. Low forecast job growth is actually a very positive feature of the Bridgend (and wider national) economy. Forecast job growth is low mainly because most people who want a job have one and 'economic growth' going forwards needs to be fuelled by productivity improvements.

Job growth by sector

4.45 Although total job growth is low this 'headline' hides growing and declining sectors.

4.46 The table below shows where sectors are expected to grow employment, or decline employment over the life of the next plan.

4.47 What is noticeable is that some of the largest growing sectors don't occupy 'employment space'. Most obviously 'health', 'residential social care' and 'education'.

4.48 This is not uncommon and will largely be related to the size and structure of the local population; and government spending priorities. The health and social care grows rapidly across the UK as the sector adjusts to the aging population.

4.49 It interesting to note that 'retail' is now a declining sector but 'wholesale' and 'land transport' (warehousing and distribution) grows. This would align with a continued move away from the High Street.

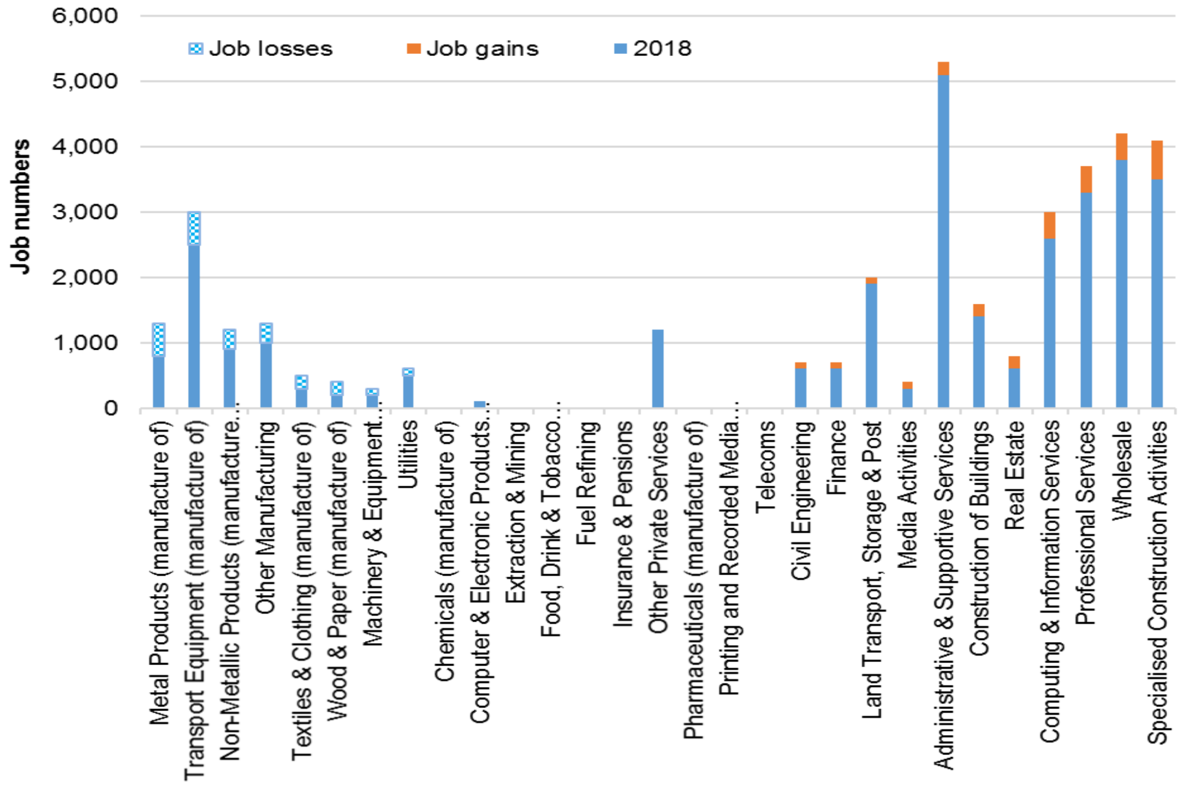
Table 4.3 Bridgend job change by sector

Broad Sector	2018	2033	Change
Accommodation & Food Services	4400	4400	0
Administrative & Supportive Services	5100	5300	200
Agriculture, Forestry & Fishing	400	400	0
Air & Water Transport	0	0	0
Chemicals (manufacture of)	0	0	0
Civil Engineering	600	700	100
Computer & Electronic Products (manufacture of)	100	100	0
Computing & Information Services	2600	3000	400
Construction of Buildings	1400	1600	200
Education	5800	6300	500
Extraction & Mining	0	0	0
Finance	600	700	100
Food, Drink & Tobacco (manufacture of)	0	0	0
Fuel Refining	0	0	0
Health	7900	8800	900
Insurance & Pensions	0	0	0
Land Transport, Storage & Post	1900	2000	100
Machinery & Equipment (manufacture of)	300	200	-100
Media Activities	300	400	100
Metal Products (manufacture of)	1300	800	-500
Non-Metallic Products (manufacture of)	1200	900	-300
Other Manufacturing	1300	1000	-300
Other Private Services	1200	1200	0
Pharmaceuticals (manufacture of)	0	0	0
Printing and Recorded Media (manufacture of)	0	0	0
Professional Services	3300	3700	400
Public Administration & Defence	5500	5300	-200
Real Estate	600	800	200
Recreation	1000	1000	0
Residential Care & Social Work	3500	4500	1000
Retail	6600	6200	-400
Specialised Construction Activities	3500	4100	600
Telecoms	0	0	0
Textiles & Clothing (manufacture of)	500	300	-200
Transport Equipment (manufacture of)	3000	2500	-500
Utilities	600	500	-100
Wholesale	3800	4200	400
Wood & Paper (manufacture of)	400	200	-200
Total	**68700**	**71100**	**2400**

Source: Experian Dec 2018

4.50 In the chart below we look only at the B class uses. These are the type of activity that we normally assume require 'employment land'.

Figure 4.4 Bridgend job change by sector to 2033



Source: Experian Dec 2018

4.51 Within these sectors there is a clear pattern. Traditional manufacturing continues to decline but this is offset by growth in office sectors, some construction and warehousing / wholesale.

4.52 However, for manufacturing it is noticeable that this future decline in absolute terms is much slower than seen in the past. Manufacturing as a broad sector declined from 13,200 jobs in 1997 to 8,500 20 years later. Over the next 20 years the sector is forecast to decline to 5,500 jobs.

4.53 We note that this forecast decline does broadly align with the recent, known job losses in Bridgend. . So over the life of the plan there is no need or rationale to adjust the forecasts to reflect this – but a large loss, early in the forecast period would need to be kept under review.

Floorspace change

4.54 The table below translates job change by B class sector (office industrial and warehousing) into floorspace demand.

4.55 To do this we assume that each office job requires 12 sqm of space, each industrial job 45 sqm and each warehouse job 73.5 sqm.

4.56 The source for these densities comes from the HCA Employment Densities guide (2015) but for industrial we use a ‘blend’ of the densities quoted for manufacturing and light industrial units. For warehousing we blend ‘final mile’ and ‘regional distribution’. This reflects the local market in Bridgend.

4.57 We also, when estimating how much floorspace is needed to accommodate job change, make an allowance for 7.5% of the floorspace to be vacant. This reflects the fact that in an ideal market around 7.5% of the floorspace stock is available to occupiers looking to relocate – this allowance is sometimes referred to as a 'margin for market choice, churn and friction'.

Table 4.4 Bridgend – forecast job and floorspace change to 2033

B classes	2018-23 Jobs No.	2018-23 F'space sq m	2023-28 Jobs No.	2023-28 F'space sq m	2028-33 Jobs No.	2028-33 F'space sq m	2018-33 Jobs No.	2018-33 F'space sq m
Office	**312**	**4,631**	**546**	**8,101**	**316**	**4,682**	**1,174**	**17,414**
Industrial	*-452*	*-21,897*	*-481*	*-23,285*	*-556*	*-26,923*	*-1,490*	*-72,105*
Warehousing	*108*	*8,519*	*140*	*11,086*	*53*	*4,211*	*301*	*23,816*
Indl + whsing	**-345**	**-13,378**	**-341**	**-12,199**	**-503**	**-22,712**	**-1,188**	**-48,289**
Total B class	**-32**	**-8,747**	**205**	**-4,098**	**-187**	**-18,029**	**-14**	**-30,875**

Source: Experian Dec 2018 and PBA analysis

Land change

4.58 To convert floorspace into land requirements we use a plot ratio of 40%. This is typical for industrial and warehouse units and it is unusual to find higher plot ratios in modern developments. This is because they require considerable yardage to efficiently use the built floorspace.

4.59 Our market review suggests that the estates here are mixed between warehousing and industrial units – so we can 'net off' the small growing warehouse demand against some of the industrial losses.

4.60 Appling a 40% plot ratio would suggest around 12 ha less land for industrial and warehousing uses in the next plan. For offices we also use 40% - although note that this may be low and some modern developments achieve 60%. But to increase plot ratios tends to need taller buildings that are more expensive to deliver and so in this market less viable. So, 40% was applied as a cautious density factor.

4.61 Adopting the above methodology would suggest that 17,414 sq m of net additional employment space will be needed to accommodate employment growth over the replacement LDP period to 20133, amounting to just over 4ha of land (an overall net change of 8 ha over the LDP period). However, this may not need to be new land as under this scenario the demand for industrial land declines and some of this land could be re-used.

4.62 Given the size of the existing employment land supply, this effectively represents zero change to employment land supply requirements over the Bridgend replacement LDP period.

An allowance for losses?

4.63 The forecast data relates to net (job) change – whereas the plan needs to provide for gross land. Above we noted that the Council has delivered 2ha of new land in recent years but with no increase in floorspace stock. This suggests than in addition to the land calculated above 2 ha needs to be added each year to allow for any unexpected losses from the stock.

4.64 Given we conclude that the forecast approach is around zero this means that the past take-up approach and the forecast approach suggest a similar amount of land is needed over the plan period, namely 2 ha per annum.

Labour supply

4.65 One of the advantages of using economic forecasts from Experian is that they are transparent with their labour supply assumptions. Experian use the extant sub national population projections and so household projections to inform their model. In this case the Welsh Government Principal projection that requires around 271 dpa.

4.66 But as noted above this baseline position is one of limited job change in Bridgend. Under the labour demand scenario, which assumes delivery of the Principal Projection households, the number of jobs increases slightly but this is a product of more part time jobs and an increase in 'double jobbing' in the economy than new people in employment.

4.67 Here Bridgend is not strategically constrained and can, if the Council chooses, provide more new homes than the 'baseline' with an expectation that population and labour supply growth will be higher.

4.68 When discussing the emerging Development Plan Manual we outlined why the Welsh Government is cautious about any model (demographic or economic) that claims to demonstrate a 'mathematical link' between jobs and houses. Models are helpful but need to be viewed 'in the round'. For any labour supply scenario there is a clear 'chicken and egg' dilemma given that a large amount of migration is economic led and, even if housing land provided, the people won't be attracted to move (and the housebuilders to build) if the local economy does not demand the jobs.

A different trend period?

4.69 While there is undoubtably a 'chicken and egg' problem with jobs and houses there are reasons to treat the 'low growth' labour demand and trend based demographic projections with some caution here.

4.70 The Council's demographic work suggests that the current round of Welsh Government demographic projections are not typical of longer-term trends. The demographic evidence suggests that the trend period was largely recessionary with lower levels of net migration observed than more recent years and lower housebuilding that the market is currently delivering.

4.71 There is, on demographic grounds, sound reason to treat the 271 dpa (Welsh Government principal projection) with caution – it may reflect a time when demographic patterns and migration flows into Bridgend were not typical.

4.72 This critique, that the demographic modelling projects an 'untypical' trend period, does not transcribe so readily to the economic forecast. This is because the economic forecasts use a very long trend period (from the 1970s in the case of Experian). They also use more recent data, unlike the demographic data where more recent demographic data post 2014 (in the WG projection) does not inform the projection the forecasts use the most recent economic data available.

4.73 The Council's demographic analysis suggests that to meet more recent trend driven growth 505 dpa are needed. This is largely because net migration is projected to be much higher – increasing from 363 pa (271 dpa) upto 824 pa (505 dpa).

4.74 For the reasons set out above we are cautious about these numbers but assuming the demographic evidence is correct, that migration flows will attract sufficient people to 'fill' 505dpa, for this study we need to consider three plausible scenarios.

- The first is where migration levels are maintained to support 505 dpa and the Bridgend job market responds positively to provide new jobs. Bridgend becomes more attractive to grow business because it, unlike other parts of Wales (and the UK), offers a larger supply of labour.
- A second possible scenario is where the homes are delivered but the jobs not – and so the new residents commute out to work. The availability of additional homes here meets the economic needs of Cardiff for example.
- A third is where the lack of a local economic driver means that the profile of migration shifts – the homes are not filled by economically active people – because they are not attracted to Bridgend for jobs. But older people who move to Bridgend for other reasons.

4.75 While we don't know which of these scenarios may come to pass (and there may more plausible scenarios) , pragmatically Bridgend's positive employment land response should be the same.

4.76 Under the first scenario the new homes and labour stimulate the economy; so these new jobs need a matching supply of land; under the second there is a risk that through a lack of opportunity and land to accommodate new opportunities, Bridgend new residents have no choice but to commute out. Under the third scenario the lack of economic opportunity, constrained by a lack of land, prevents local job creation and contributes to a shift in migration profiles.

4.77 The best way to manage all three outcomes would appear to be providing commercially attractive employment land to accommodate the 'best case' of these outcomes. Here land for economic development is not in short supply and, as we discuss later, the Council is more than able to meet the 'best case' and support a very positive approach to new land allocation. Elsewhere, where land is more constrained and the overall planning balance shifts against (modest) possible overallocation of land then this may not be such a simple choice.

4.78 To estimate how much more land and floorspace is needed we look to the demographic evidence. The Council's demographic evidence indicates that were 505 dpa provided in the Borough, the number of 'employed people' would increase by 219 persons per year.

4.79 We also understand that the demographic work has made a further adjustment – whereby unemployment falls in Bridgend to 4.1% increasing the number of 'employed persons' to 266 over the baseline.

4.80 This assessment carries the shortcomings associated with any demographic model discussed above but, understanding these limitations, provides a helpful view which shows that the Borough ought to consider providing scope for an additional 266 employed people per year. Pragmatically, were land not provided to meet this scenario then the lack of land would invalidate the scenario in question.

4.81 Accepting that positive planning would suggest provision is made for the additional 266 people in employment each year the next question is what type of land ought to be provided to ensure that we maximise the possibility that these jobs are created locally?

4.82 To do this we cannot simply 'scale up' the forecast because many sectors are forecast to decline and the possible increase in labour is unlikely to arrest this trend. So we need to look to the 'growing' sectors with the expectation that these will grow faster in response to the larger labour supply.

4.83 Further, assuming these new jobs require B class looking at the growing sectors in the baseline forecast suggests new land ought to be provided in a mix of office and warehousing at 4:1 ratio.

4.84 So to develop a 'policy on' scenario that best aligns with the 505 dpa, we assume that each new job may need 24 square metres of B class space and each new worker (employed person) needs new space for one new job. While there is no allowance for 'double jobbing' in this estimate by assuming that that all new jobs generates demand for new B class floorspace space is already a very positive assumption. Many of the new jobs may be outside the B classes. Allowing 24 sqm per new employed person increases the 'need' for new B class space by 6.350 sqm per annum.

4.85 This analysis suggests that it would be sensible for Bridgend to provide land for up to 4 ha per annum, 2 ha of which is to manage 'baseline' growth – both the past take-up approach and forecast approach reach a similar conclusion. An additional 2 ha should be provided as an optimistic estimate to manage the possible labour supply and job demand flowing from higher housing delivery that the baseline projections suggest and provide a small contingency should new job creation be more bias to industrial as opposed to offices as the baseline forecast expects. .

4.86 The approach adopted above is in line with the overarching advice from the Welsh Government which warns that LDPs should not attempt define a 'mathematical relationship' between homes and jobs12; The 4ha recommendation is a positive approach that allows the Council to allocate enough land so that every new worker, suggested by the demographic work, has an opportunity to work in Bridgend's B class economy should the employment market respond positivity to the increase in labour supply. This relationship between the uplifted homes, labour supply and jobs, obviously needs to be kept under review. Should the demographic assumptions not hold true, for example the new homes are built but the job economy is unable to absorb the labour (even with additional land allocated) unemployment may rise and economic activity fall – resulting in a poorer outcome for local residents. Margin

4.87 The Guidance advises that a further adjustment to the past trends or labour demand scenarios to provide an additional 'margin'. The margin provides a safety net should sites not come forwards as envisaged and to provide for market choice, churn and friction. The scale or need for a margin is at the discretion of the Council.

4.88 Here, we are advising the Council to plan for 4ha of new land per annum. 2ha of which is related to higher housing delivery in the next plan and associated possible job creation should all these new jobs require B space provision.

4.89 Given that this assumption is very likely to be a very 'positive' number, assuming no change in household formation and that every new employed person generates demand for an additional B class job, we do not see the need to make a further allowance for an additional margin.

Cross boundary need

4.90 Earlier in this report we found that Bridgend is reasonably self-contained with no commuting imbalance. We found that the property market is also reasonably self-contained. While Bridgend is part of a wider South Wales market it is generally viewed in as distinct local market in its own right. We also found that the local economy is approaching full employment and most of the net additional job growth can only be justified by higher than trend-based housing growth – and so labour supply.

4.91 We are aware that a significant number of new homes may be delivered in neighbouring districts but in close proximity to Bridgend. In this scenario it may be sustainable and logical that at least some of these workers will contribute to the Boroughs labour supply. This may help strengthen the critical mass on the main Bridgend estates and allow local firms to grow faster than they may do otherwise.

4.92 We would suggest that the Council explores with its neighbours to what extent this makes a sound cross boundary planning scenario. As a worst case significant new employment is promoted on the borough boundary that only competes with Bridgend's estates – displacing demand from Bridgend. Were new space provided in close proximity, delivered with extensive public sector support, it is possible that Bridgend may not be able to compete.

[12] Development Plan Manual 3rd edition para 5.50

4.93 This joined up approach would also align with the Welsh Governments focus on larger than local planning and the need for neighbouring Councils to adopt a joined up approach in their development plans. Also the pragmatic fact that Functional Economic Market Areas – or labour catchments more generally not exclusive to an individual district – any large economic or housing development needs to be viewed with regards to the practical market area – irrespective of administrative boundaries.

4.94 Also, from a pragmatic stance, the Welsh Government has made a number of significant investments into Bridgend – to provide and service development plots. Most obviously at Brocastle – that have yet to be implemented or delivered. Elsewhere the Borough has a number of allocated but undelivered sites. So any new inward investment ought to be directed to these as a first priority to make the most efficient use of the land and the previous investments.

Summary

4.95 The analysis above shows that less land is needed in the next plan that was justified in the adopted plan. This not necessarily a negative finding – the resident economy is currently performing well and the 'need' for net additional jobs therefore limited. The Borough is starting from a reasonable position and should higher job growth be promoted then it needs to be joined with additional housing and labour. It is possible, although not the case at the moment, that should the workspace economy grow faster than the forecasts and past trend analysis suggests, and not be matched by more homes a labour constrain could emerge over time. In our work we cannot deliver the jobs or new businesses but provide the land in the right locations to facilitate higher job growth.

4.96 Both past trends and the economic forecasting approach suggest 2 ha a year – largely driven by windfall losses from existing stock being 'made good' as opposed to new sites and net additional floorspace being delivered.

4.97 In addition, because the Council is proposing to deliver more new homes than the current Welsh Government projections, making positive provision for a younger (working age) migration profile this suggests we need to provide additional land.

4.98 The Welsh Government warns about trying to align jobs and homes too precisely - in England the Government has deleted guidance about this because there is so much uncertainty.

4.99 Here Edge Analytics have provided a view, based on the best available demographic evidence. This shows that, with a higher house building target (than the WG projections) the availability of labour will be higher.

4.100 The availability of a an additional 200-250 'employed persons' in the demographic projections does not guarantee that the economy will choose to pick up this labour. But if we don't make provision for these jobs then we wont be providing the economy with land to respond in a positive way.

4.101 We have estimated that no more than 2ha of additional land is needed to accommodate these potential workers. This has assumed that they all occupy B class space and jobs come forward as a mix of offices and industrial – so 1:24 sqm per job. So our 2ha has the capacity to accommodate slightly more jobs than 'employed persons' (333 jobs). So allowing some additional contingency for the mix of potential jobs to differ or land not to come forward. A more detailed calculation would not be proportionate given the huge uncertainties in both the demographic and employment land evidence.

4.102 Overall this suggests the plan needs to provide for 4ha of new land per year – 60ha over 15 years. Half of this is 'needed' for baseline growth and to replace losses we may expect via windfalls. The other half is positive provision to allow for a higher labour supply flowing from the proposed new houses.

5 THE PROPERTY MARKET

Study approach

Overview

5.1 This chapter reviews the property market for general employment space in the Borough of Bridgend, covering office and general industrial/strategic distribution space. This review takes a more qualitative view, complementing and testing the quantitative need assessment in previous chapter.

5.2 For general industrial, strategic distribution and office space we consider in turn demand, supply and the balance of the market. The main purpose of the analysis is to identify where there is potential demand for new floorspace, and hence a need for development land to be identified in the emerging plan.

5.3 In relation to demand, we identify the types of business that are taking space in the borough or may consider doing so, and what property they are looking for in terms of size and quality. In relation to supply and market balance, we analyse the stock which is currently available, recently developed and in the pipeline, and the rental values that properties in the area are achieving. The purpose of our analysis is to determine:

- How far the existing floorspace stock is meeting current and foreseeable occupier requirements;
- Hence, how far there is likely to be demand for more or different space, now or in the future;
- Conversely, if property and land are oversupplied, overall or in particular sections of the market.

5.4 These findings help assess the potential demand for new employment floorspace, and hence the quantity and qualitative mix of development sites that the new Local Plan should identify for employment uses.

5.5 A strength of the market-facing analysis is that it considers real-life property transactions, including the values (rents and prices) realised in such transactions, and whether these values are enough to support viable development. This provides evidence of effective, or viable, demand – which means that potential occupiers will pay enough, and (where relevant) provide sufficient covenant strength,[13] to support financially viable development.

Sources and definitions

5.6 Our property market research has drawn on three main sources:

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[13] A business tenant has strong covenant if there is good evidence that they will be in good financial health, and able to pay the rent, through the period of the tenancy.

- We have relied on the property market database CoStar and commercial property research reports for evidence of take-up, availability and values, both for the market overall and individual properties. CoStar may report units as being available when they are currently occupied, this is due to its method of lease availability classification. To ensure consistent analysis we have treated all available properties as vacant.
- Total stock figures have been derived from analysis of Valuation Office Agency (VOA) data on business rate assessments. We have cross-referenced this data with the CoStar data to provide an indication of vacancy rates. Cross-referencing the CoStar and VOA data does have limitations as the sources are different therefore not guaranteeing the description on unit type or size being the same. The reason why there may be discrepancies with the unit type is that the VOA data has 117 description codes, of which we have used 24[14] in our analysis. Whereas agents list property on CoStar across three broad categories of industrial, light industrial or office purposes – some of which may fall outside the VOA 24 categories we have used. Due to the volume of data, it has not been possible to “iron out” these discrepancies.
- For greater qualitative understanding of the market, we have consulted by phone with agents and in person with Council’s Economic Development.

5.7 The main market indicators we have considered are rental values and capital values, recent take-up and floorspace availability (vacancy). In a property market context, ‘take-up’ means the occupation of business floorspace.[15] Take-up covers both new-build and second-hand space (second-hand being the larger share of the market). When we consider availability, we consider all space being currently marketed. This covers both new and second-hand space.[16]

Areas of analysis

5.8 In this study we refer to the six separate areas, which are set out in Figure 5.1 and summarised below.

[14] Office and premises, office and premises, office workshop, offices and premises, offices car spaces and premises, offices, showroom and premises, distribution warehouse and premises, factory and premises, storage and premises, storage depot and premises

Vehicle repair workshop and premises, Warehouse and premises, Warehouses and premises, Workshop

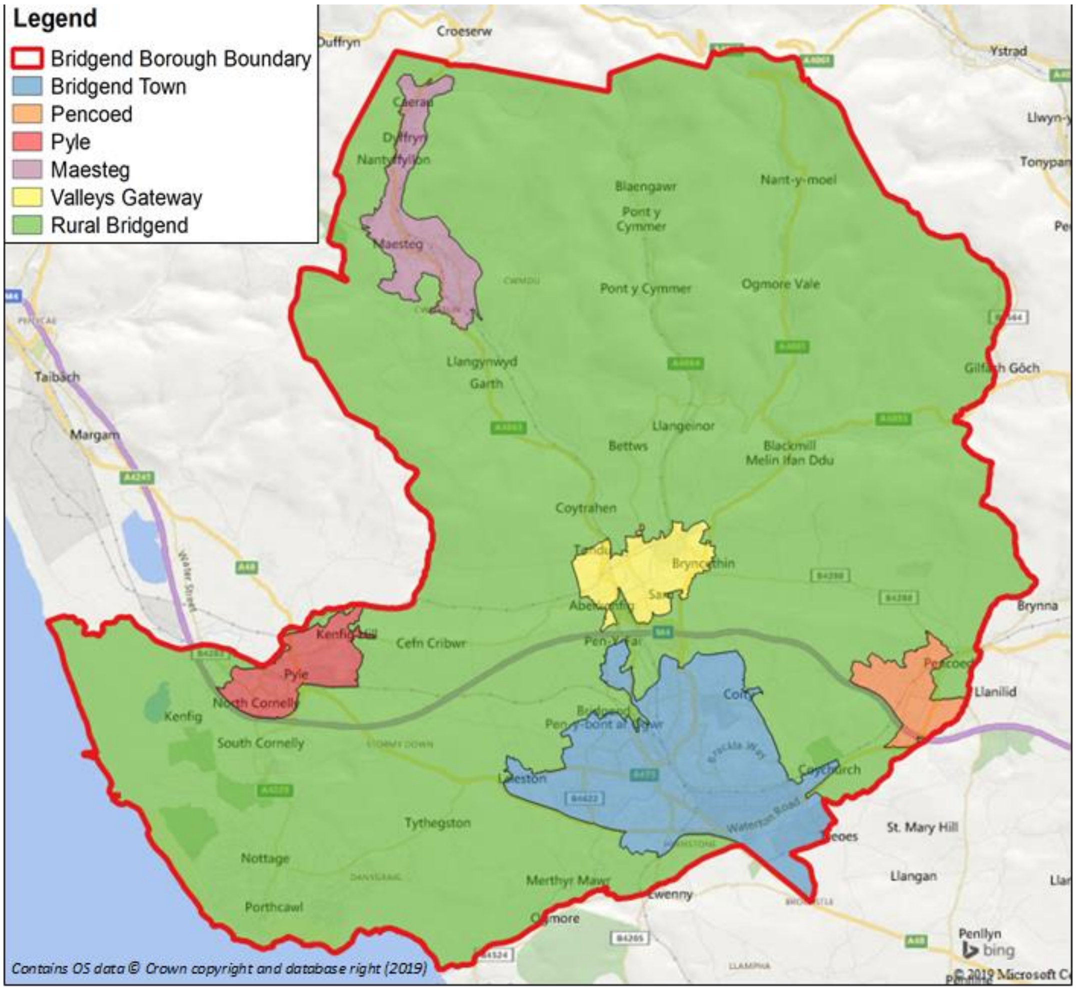
Workshop and premises, Workshop offices and premises, Workshop, gymnasium and premises, Workshop, office and premises, Workshop, offices and premises, Workshop, showroom and premises

Workshop, storage land and premises, Workshop, workshop and premises, Workshops storage land and premises

[15] By contrast, in a planning context ‘take-up’ means the land developed to provide new floorspace.

[16] Second-hand stock comprises all previously occupied floorspace, including refurbishments.

Figure 5.1 Defined locations for market analysis



Source: OS, Bridgend County Borough Council, AspinallVerdi (2019)

5.9 In this study, we make reference to six different geographical areas, these are defined as:

- Bridgend Town – the extent of the urban area of Bridgend as defined by policy PLA1 of the Council's Adopted Local Development Plan (2006-2021) Settlement Boundaries and extended to the villages of Pen-y-fai, Laleston, Coychurch and Coity.
- Pencoed – the extent of the urban area of Pencoed as defined by policy PLA1 of the Council's Adopted Local Development Plan (2006-2021) Settlement Boundaries and the extended to include the areas surrounding Pencoed Technology Park and Pencoed Business Park.
- Maesteg – the extent of the urban area of Maesteg as defined by policy PLA1 of the Council's Adopted Local Development Plan (2006-2021) Settlement Boundaries.
- Pyle – the extent of the urban area of Pyle/Kenfig Hill/North Cornelly as defined by policy PLA1 of the council's Adopted Local Development Plan (2006-2021) Settlement Boundaries.

- Valleys Gateway – the extent of the urban area of the Valleys Gateway settlements of Aberkenfig/Bryncethin/Brynmenyn/Sarn/Tondu and Ynysawdre as defined by policy PLA1 of the council's Adopted Local Development Plan (2006-2021) Settlement Boundaries.
- Rural Bridgend – the rest of the county borough excluding the above geographical areas.

The industrial market

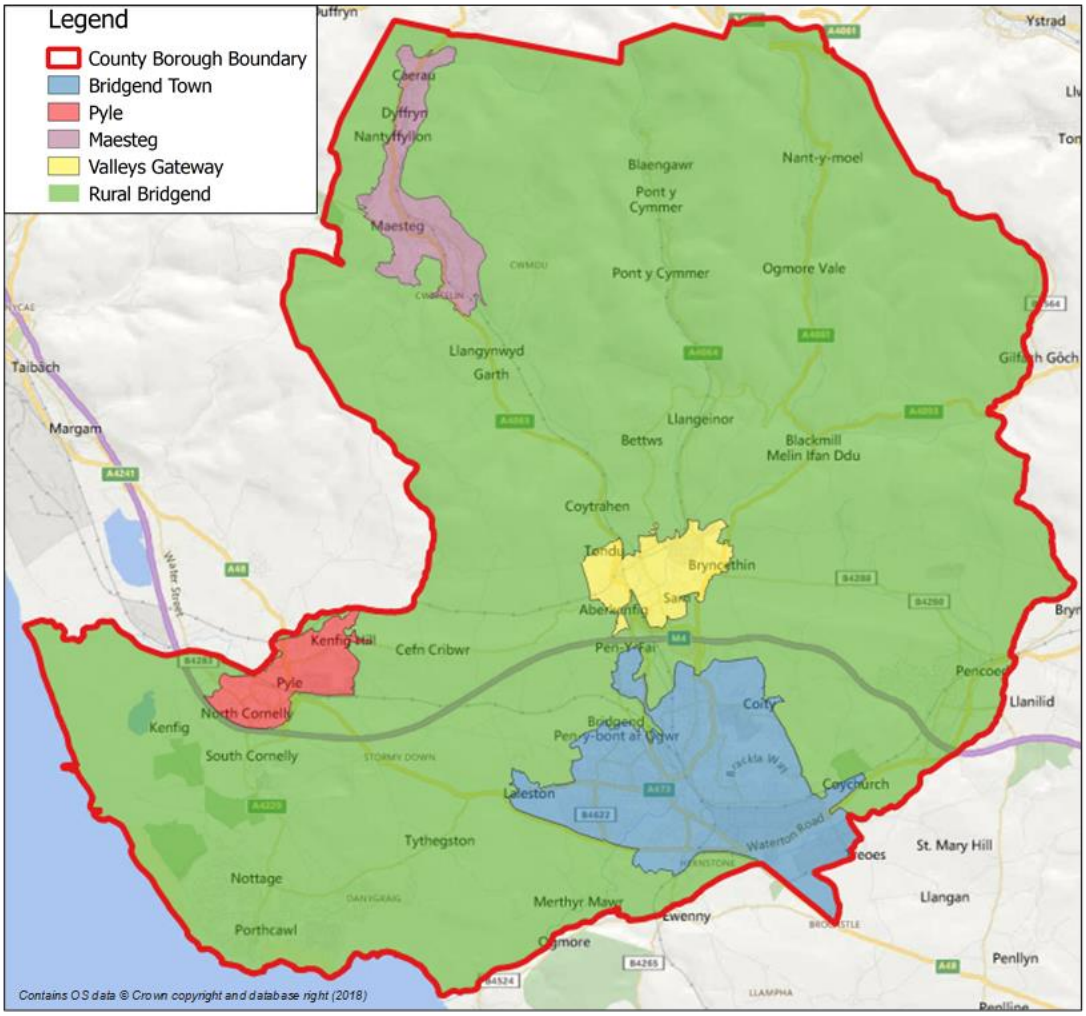
Introduction

5.10 For our market analysis, we consider industrial and distribution uses (B1c, B2 and B8) as one property market sector. This is because these uses generally occupy the same types of building, are generally inter-changeable and are difficult to distinguish in practice.

5.11 Typically, for studies of this nature, we split our analysis of the industrial market into general industrial uses (production space (factories and workshops) and small to medium-sized warehousing) and large-scale strategic warehousing (100,000 sq ft+) because they are driven by different factors on the demand side. However, the focus of the employment market across this local authority area is not large-scale strategic warehousing, and therefore separating would not provide for any meaningful analysis.

5.12 There is a lack of transactional and vacancy data on CoStar for industrial properties for the Pencoed area identified in Figure 5.1Figure 5.1 to allow for any meaningful analysis. Therefore we have combined the Pencoed area with the Rural Bridgend as shown in Figure 5.2.

Figure 5.2 Defined industrial locations for market analysis



Source: OS, Bridgend County Borough Council, AspinallVerdi (2019)

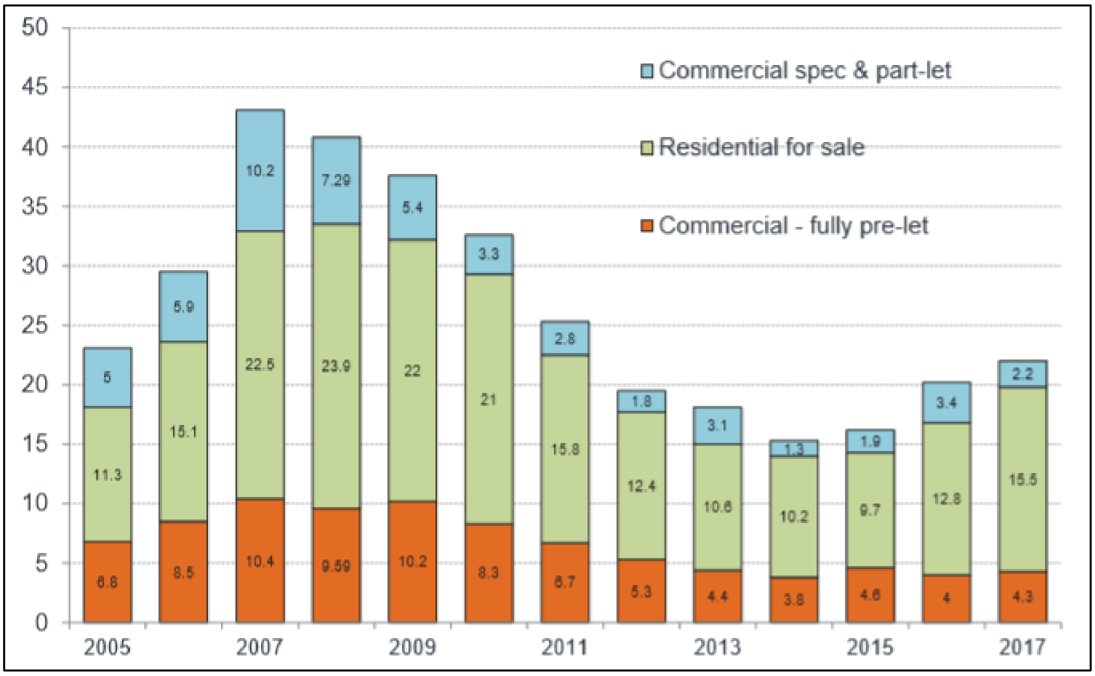
National context

5.13 The national industrial market remains healthy due to good levels of demand and tightening supply. In the global economic crisis, speculative development came to a halt. At that point in time there was excess supply to meet demand due to weakening occupier demand and the wave of speculative development that had occurred pre-financial crisis (driven by easy access to finance) remaining on the market.

5.14 In recent years supply has tightened, this is due to; lack of speculative build, improvements in the economy, changing shopping patterns (increase in online sales), and some units being lost to higher value residential uses. Over the last 12 months the UK car manufacturing industry has started to contract with a variety of reasons cited including a shift from petrol/diesel engines to electric and BREXIT.

5.15 Typically, when supply tightens this a market signal to commence development. But since the global financial crisis developers are finding it much more difficult to finance development as banks have sought to limit their exposure to commercial lending - this is illustrated in Figure 5.3, which shows that outstanding development loans for commercial[17] fully pre-let properties are currently less than half the value they were in 2007, and for speculative and part-let commercial around 1/5th.

Figure 5.3 Outstanding development loans £bn



Source: Cass Business School, Commercial Real Estate Lending Survey Analysis and conclusions 2017/18

5.16 Due to the tight nature of the funding markets, speculative development is generally only occurring in ‘super prime’ areas (e.g. parts of the M1 corridor, Heathrow etc.). These areas have very strong occupier demand from blue-chip covenants who are prepared to commit to longer terms leases (typically in excess of 10 yeas), therefore the perceived risk is low. Speculative development is often only occurring for larger units that can be occupied by these large national /international firms.

5.17 The economics for smaller and medium-sized development is different from large-scale distribution units both in terms of cost and values. Smaller and medium-sized units do not benefit from economies of scale for build costs compared to large units. Covenant strength of occupiers of smaller units are generally weaker and result in less secure income and lower capital values. In addition, this income is usually guaranteed for a shorter period due to shorter lease terms. Small and medium-sized development is typically only occurring on: previous employment sites where infrastructure is currently in place; or as part of larger strategic employment sites whereby the large-scale distribution units are able to pay for the infrastructure to service the smaller and medium-sized units.

5.18 The lack of speculative development has led to an imbalance in the market with some occupiers having to wait for build to suit opportunities or taking second-hand space to satisfy immediate requirements. With a lack of suitable medium-sized space,

[17] Commercial property is classified as all non-residential property thus including the B class uses - office, industrial and warehousing as well as uses such as retail

occupiers across the country are struggling to find suitable space for business expansion. This is having a knock-on effect, with smaller units not experiencing 'natural' levels of market churn therefore not freeing up space for SMEs and start-ups.

South Wales as an industrial location

5.19 South Wales has a long industrial heritage covering ironworks, coal mining, wool making and vehicle manufacturing to name but a few. The combination of automation and competition from abroad with cheaper labour has resulted in South Wales (like other parts of the UK) loosing many of these traditional industries.

5.20 Despite the M4 being a key motorway corridor, the M4 in South Wales has not seen significant demand for large-scale B8 distribution. The focus of this market remains further east around Avonmouth due to its north/south and east/west links. Agents are hopeful that with the removal of the Severn Bridge toll will entice occupiers and investors further west but as yet this is still unproven. It is anticipated the areas furthest east (Newport and Cardiff) will be best positioned to capture such demand.

5.21 Elsewhere demand is typically, from established companies in the borough seeking to expand and companies servicing the local and regional markets. Demand is from a variety of sectors, with no one sector driving demand. The area does attract large the occasional large requirement either due to a specific need to be in South Wales (i.e. not "footloose requirement) or with the aid of public sector support.

5.22 Viability remains a challenge across South Wales without a significant pre-let in place to a blue-chip covenant as headline in rents Cardiff are £6.50 psf and Swansea at £5.75 psf.[18] Agents indicate that rents would need to be around £7.00 psf to stimulate development.

Bridgend as an industrial location

5.23 With a strong heritage in coal mining, ironworks and manufacturing the focus of the employment market in Bridgend is industrial rather than offices. As a result, Bridgend has a number of key industrial estates with some large companies and vacant sites that were previously used by traditional industrial uses.

Bridgend Town

The industrial market in Bridgend Town is mainly focused around the industrial estates of estates of Bridgend, Waterton, Brackla and Litchfield. As shown in

[18] Carter Jonas (2018) Industrial Overview

5.24 Figure 5.4 these estates provide a variety of age and quality of purpose-built industrial units.

Figure 5.4 Industrial space - Bridgend

Waterton Industrial Estate	Bridgend Industrial Estate
	

Source: CoStar (2019)

5.25 Bridgend Industrial Estate is located to the south of the town centre with good access to junction 35 of the M4. The estate is the largest industrial estate in the borough and includes a number of medium and small-sized warehouses and workshops as well large key occupiers. Part of the site comprises the former Sony television factory. Larger occupiers on the estate include Reflex (manufacturing) who occupy a 39,000 sq ft unit, Clarke Transport (logistics) who occupy a 37,000 sq ft unit and Trampires (animation) who occupy a 23,700 sq ft unit. The estate has also seen some non-industrial users taking space, especially gym operators.

5.26 Waterton Industrial Estate lies to the south of Bridgend Industrial Estate and also benefits from good access to junction 35 of the M4. With Litchfield Industrial Estate forming part of the wider Waterton Industrial Estate. These estates combined form the second largest industrial area in the borough. The estates are a former ordnance factory with the units here generally being of poorer quality to that found elsewhere in Bridgend Town. These poorer quality units are at risk if the due not meet Minimum Energy Efficiency Standards (MEES). MEES came into effect from 1st April 2018. The changes in MEES means that a ‘landlord cannot lawfully grant a lease of a non-domestic property that has an F or G rating on an EPC unless it has carried out cost-effective energy saving measures or claimed an exemption.’[19]

5.27 Waterton and Litchfield Industrial Estates comprise larger manufacturing and distribution units. Current occupiers include Ford (automotive) who occupy 2 million sq ft engine plant unit, Lidl (regional distribution) who occupy a new 305,000 sq ft unit, Owens (logistics) who occupy 166,000 sq ft and Hermes (logistics). Ford has announced that it plans to reduce its output at the Bridgend site which could result in ‘almost half of the site's workforce - will go in two phases by 2021, as part of 1,150 losses across the UK.’[20] As with Bridgend Industrial Estate, some non-industrial users have taken space here such as Jump Jam Trampoline.

[19] https://talkingpropertylaw.gateleyplc.com/2018/02/01/letting-commercial-properties-f-g-rating-april-2018/
[20] https://www.bbc.co.uk/news/uk-wales-47089571

5.28 Brackla Industrial Estate lies to the north of Bridgend Industrial Estate, east of the town centre. The estate is a mix of small to medium sized workshop and distribution units. Occupiers mainly include companies serving the local market such as LKF Automotive (car repairs) who occupy a 2,500 sq ft unit and C T R Distribution (logistics) who occupy a 3,100 sq ft unit. Again, some units have been lost to non-industrial users especially a number of gym operators.

5.29 In addition to the estates listed above Bridgend Town also has a number of smaller industrial estates/areas. These include Trews Field Industrial Estate, Crosby Yard, Penybont Industrial Estate and Coychurch Yard. These areas are mostly small industrial units with a few medium-sized units. The units vary in age and specification although the majority of units are dated as they were built before 1995. Occupiers in these areas include Booker Wholesale (wholesale) who occupy 34,000 sq ft of space at Trews Field Industrial Estate and TJ Autos (automotive) who occupy space at Crosby Yard.

Valleys Gateway

5.30 The Valleys Gateway area comprises the villages of Tondu, Abergarw, Aberkenfig, Brynmenyn, Sarn and Bryncethin. The industrial market in the Valleys Gateway is focused around Brynmenyn Industrial Estate and Abergarw Trading Estate with a small industrial area at Tondu Enterprise Centre. As shown in Figure 5.5 some of these are offered to the market on a refurbished basis.

Figure 5.5 Industrial space – Valleys Gateway

Brynmenyn Industrial Estate	Abergarw Industrial Estate
	

Source: CoStar (2019)

5.31 Brynmenyn Industrial Estate is in Abergarw, east of Tondu/north of the M4. The estate has good access to junction 36 of the M4. The estate is the largest industrial area in the Valleys Gateway. The estate comprises a mix of small and medium-sized dated warehouses and workshops. Major occupiers on the estate include Wetherby Building Systems (construction) who occupy a 10,300 sq ft unit, Ecokeg Europe (plastic manufacturer) who occupy a 7,000 sq ft unit and Dennis Eagle (pump hire) who occupy a 5,600 sq ft unit. Elsewhere on the estate, there are smaller industrial units occupied by the likes of Gemma Louise (logistics) who occupy a 3,400 sq ft unit and Mason Brothers (machinery dealers) who have a 4,900 sqft unit.

5.32 Abergarw Industrial Estate is located northeast of Brynmenyn Industrial Estate and again benefits from good access to junction 36 of the M4. The estate is the second largest industrial estate in the Valleys Gateway and comprises small to medium-sized purpose-built industrial units of varying age and specification. Current occupiers on the estate include Crendon Timber Engineering (manufacturing), B & W Tunnelling (engineering), Weddel Swift Distribution (logistics) and Power Electrics (generators).

5.33 The other industrial area in the Valley Gateway is Tondu Enterprise Centre which is a small industrial estate which comprises 59 light industrial and trade counter units. Occupiers here are generally SMEs serving the local markets. Occupiers include PC Signs (sign making), Glitter Body Art (manufacturing) and Just Perfect Catering (contract catering).

Pyle

5.34 The industrial market in Pyle is focused around Village Farm Industrial Estate. Village Farm Industrial Estate is located towards the south of Pyle and benefits from access to junction 37 of the M4. The estate is the largest industrial area in Pyle and the third largest in the borough. As shown in Figure 5.6 the estate mainly comprises small sub 5,000 sq ft terraced units, the majority of which are dated. Occupiers on the estate are companies serving the local markets and include Tonic Studios (paper craft) who occupy a 7,200 sq ft unit and One Vision Digital (communications) who occupy a 1,500 sq ft unit.

Figure 5.6 Examples of industrial space - Pyle

Sturmi Way	Village Farm Road
	

Source: CoStar (2019)

5.35 The other industrial location in Pyle is Dunraven House, which is the headquarters of Dunraven and is used for the production of PVCu windows, doors, conservatories etc.

Maesteg Area

5.36 The Maesteg Area industrial market is focused around three main estates, Forge Industrial Estate, Heol Ty Gwyn Industrial Estate and Spelter Industrial Estate. As shown in Figure 5.7 the units are dated and some require refurbishment.

Figure 5.7 Examples of industrial space Maesteg

Heol Ty Gwyn Industrial Estate	Spelter Industrial Estate
	

Source: CoStar (2019)

5.37 Due to this area's relatively poor motorway access occupiers on these estates tend to serve the local markets or are here for historic reasons.

5.38 In terms of a number of units, Heol Ty Gwyn Industrial Estate is the largest industrial area in the town. It comprises a range of sizes and quality of units. Occupiers include Premier Blinds (distribution) and C J R Vehicle Services (automotive). Forge Industrial Estate comprises small and medium-sized terraced industrial units Occupiers on the estate include Chemix Autocentre (automotive) and Versa Climb (health and fitness machinery). Finally, Spelter Industrial Estate is a small employment area with the main occupier Talgarth Bakery (food production and distribution) who occupy a number of units.

Rural Bridgend

5.39 Rural Bridgend incorporates the rest of the borough not included in the other defined areas above. Some of these industrial areas are occupied by a large single occupier whilst others are smaller industrial estates occupied by multiple companies. The largest estates are Pencoed Technology Park, located south of the village of Pencoed, Bridgend paper Mills in Llangynwyd, Wren Tarw which is located north of Pencoed, Penllwyngwent Industrial Estate in Ogmore Vale and an IrvinGQ unit in Llangeinor. As illustrated in

5.40 Figure 5.8 the units in Rural Bridgend are a mix of age and quality.

Figure 5.8 Industrial space Rural Bridgend

South Cornelly Industrial Estate	Penllwyngwent Industrial Estate
	

Source: CoStar (2019)

5.41 Pencoed Technology Park is the former Sony plant which was purchased by the Welsh Government in 2014 for £12.3 million.[21] The park has modern purpose-built units and benefits from immediate access to junction 35 of the M4. Occupiers at the park include Cellnovo (healthcare), Lux-Tsi (electronics), and Seren Photonics (technology).

5.42 Penllwyngwent Industrial Estate is located in Ogmore Vale approximately 6 miles to the north of 36 junction of the M4. Due to is relatively remote location compared to other industrial areas in the borough, occupiers here are mostly local companies servicing the local markets. Current occupiers include Autosave Ogmore Vale (vehicle repairs) and The Parsnipship (food distribution).

5.43 There are some smaller industrial estates/areas elsewhere in the borough. These include Ffaldau Industrial Estate, Isfryn Industrial Estate and South Cornelly Industrial Estate. These estates comprise mainly small sub 10,000 sq ft units occupied by companies serving the local markets or with historic links to the area. Examples of occupiers include Corilla Plastics (manufacturing) at Ffaldau Industrial Estate, Coppice Alupack (manufacturing) at Isfryn Industrial Estate and Parcel Promise (logistics) and M.P. Services (vehicle repair) at South Cornelly Industrial Estate.

5.44 Also, there are a number of standalone industrial areas which have single occupiers examples include:

- Wren Tawr is a 505,000 sq ft industrial area located north of Pencoed. It was built in the 1960s and is occupied by Rockwool who manufacture insulation products.
- Bridgend Paper Mills is an industrial area located in Llangynwyd, approximately 5 miles north of junction 36 of the M4. It is currently occupied by WEPA UK as a paper mill.
- IrvinGQ in Llangeinor is a 125,000 sq ft industrial unit currently occupied by IrvinGQ (formerly Airbourne Systems) as their global headquarters. The site is approximately 4 miles north of junction 36 of the M4. It is a steel frame building currently used as a manufacturing unit for the production of safety equipment.

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[21] https://www.bbc.co.uk/news/uk-wales-south-east-wales-27049040

Demand

5.45 Demand for industrial space in Bridgend is primarily from existing occupiers located in the Borough. Agents report that these occupiers tend to be price sensitive and are not prepared to pay those rents required to enable new build development to be viable without public sector intervention.

5.46 Table 5.1 shows that between 2014 and 2018 the annual industrial take-up averaged 26 units / 263,244 sq ft.

Table 5.1 Bridgend - annual industrial take-up 2014 - 2018

Calendar year	No. of transactions	Total take-up sq ft
2014	17	233,066
2015	23	295,297
2016	33	227,271
2017	28	408,107
2018	27	152,479
Total	**128**	**1,316,220**
Annual average 2014 - 2018	**26**	**263,244**

Source: CoStar (2019)

5.47 Table 5.2 shows that the majority of take-up between 2014 – 2018 period was sub 5,000 sq ft. This shows that the majority of industrial activity is for smaller to mid-size units rather than large-scale.

Table 5.2 Industrial take-up by size, 2014-2018

Size range sq ft	No. units	% of units by size
up to 1,000	9	7%
1,001 - 2,000	27	21%
2,001 - 5,000	49	38%
5,001 - 10,000	17	13%
10,001 - 20,000	14	11%
20,001 - 50,000	7	5%
50,000 plus	5	4%
Total	**128**	**100%**

Source: CoStar (2019)

5.48 Since 2014 take-up for medium to large space has included:

- Owens (logistics) – 166,000 sqft at Waterton Industrial Estate, Bridgend
- Clarke Transport (logistics) – 37,000 sq ft at Bridgend Industrial Estate, Bridgend
- Trampires (animation) – 23,700 sq ft at Bridgend Industrial Estate, Bridgend
- Kontroltek (electronic repairs) 21,000 sq ft at Waterton Industrial Estate, Bridgend

Bridgend Town

5.49 Bridgend Town is the focus of occupier demand due to a number of large estates with good access to the eastern end of the M4 corridor in this part of the borough.

5.50 The industrial estates of Bridgend, Waterton, Brackla and Litchfield although separately defined estates form one broad employment area from an occupier perspective. All these areas are attractive to occupiers due to junction 35 of the M4 via the A473. Due to the tightening nature of the market here occupiers will follow the stock which is available at their price point and specification.

5.51 Demand for space for industrial space in Bridgend Town is wide-ranging with national, regional and local companies taking space. These estates attract a number of national trade counters such as ToolStation, Howden Joinery and Screwfix. Also, there is evidence of demand from distribution uses with the Lidl regional distribution centre and smaller occupiers such as Expert Logistics who took 17,000 sq ft unit. In addition, there is demand from manufactures such as Sofa Icon (furniture manufacturing) taking an 18,200 sq ft unit at Western Avenue and Flexitallic (gasket/sealing manufacture) taking a 3,000 sq ft unit at Kestrel Close.

5.52 Demand for industrial space in other parts of Bridgend Town is mostly for smaller industrial units sub 5,000 sq ft.

Valleys Gateway

5.53 Demand for industrial space in the Valleys Gateway is mostly at Brynmenyn Industrial Estate and Abergarw Trading Estate from local companies servicing the local markets. Examples of recent take-up include a 3,400 sq ft unit let to Gemma Loise Logistics (logistics) and Dennis Eagle (fabrication) taking 5,600 sq ft unit

Pyle

5.54 Demand for industrial space in Pyle is for units at Village Farm Industrial Estate. Demand is from companies servicing the local markets who seek good links to the M4 motorway. Recent take-up includes a 3,700 sq ft unit at 113 Village Farm Road taken by Iles Bus (vehicle modifications) and 1,500 sq ft of space at Station Road taken by One Vision Digital (vehicle repairs).

Maesteg

5.55 Maesteg’s industrial market demand is from companies servicing the local area or those companies with historic links to the area servicing the local market. Recent take up is focused around Heol Ty Gwyn Industrial Estate and include and a 1,500 sq ft unit taken by Care Direct Wales (medical) and 1,500 sq ft of space taken by Chopshoptools (wholesalers).

Rural Bridgend

5.56 Demand for industrial space in Rural Bridgend is minimal with the majority coming from small businesses servicing the local markets. Occupiers recently taking space include Crdeu (charity) taking 2,400 sq ft of space in Porthcawl and In The Shed Design (retailers/wholesalers) taking 2,300 sq ft at Gaens Quarry.

Supply and market balance

Overview

5.57 Table 5.3 shows that there are 46 units currently available in the Borough, providing a total of 599,542 sq ft against a total stock of 1,035 units / 10.518 million sq ft. Therefore, the current vacancy rate in the area is 5.7% in floorspace terms and 4.4% in unit terms. When we cross-reference the current availability against the annual average take up in Table 5.1 it equates to 1 year-9 months' supply in unit terms, and 2 years 3 months' supply in floorspace terms. Vacancy in terms of floorspace and number of units, in relation to the relative strength, of the market is reasonable.

Table 5.3 Total stock & availability of industrial floorspace

	Floorspace sq ft	No. of units
Total stock	10,518,343	1,035
Availability	599,542	46
	5.7%	4.4%

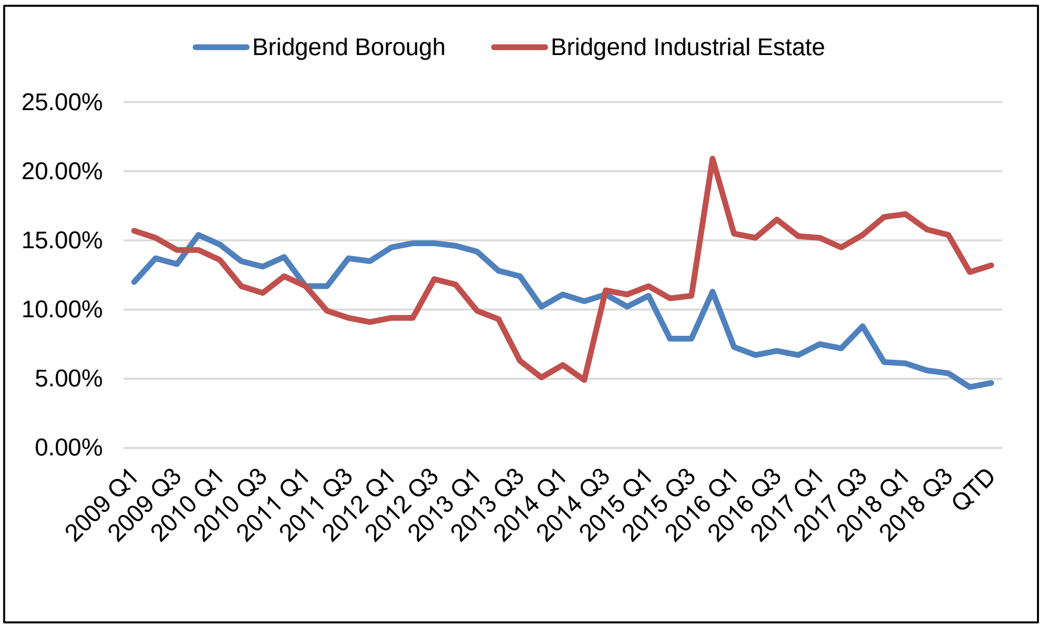
Source: CoStar, VOA, AspinallVerdi (2019)

Bridgend

Bridgend Industrial Estate

5.58 Figure 5.9 shows that the floorspace vacancy in Bridgend Industrial Estate was on a consistent downward trend from quarter 1 2009 to quarter 3 2014. However, from quarter 2 2014 to quarter 4 2015, vacancy increased from 5.00% to 21.00% and has not fallen back to quarter 2 2014 since. This is in contrast with the borough-wide vacancy rate which has consistently been on a downward trend since 2009 and currently stands at 4.70%. This compares to the current vacancy rate in Bridgend Industrial Estate of 13.20%. The vacant units advertised on CoStar range between 2,000 and 120,000 sq ft. With the majority of space is located at Kingsway Buildings at the south of the estate with 270,000 sq ft of vacant space located within 8 units.

Figure 5.9 Bridgend Industrial Estate vacancy rate

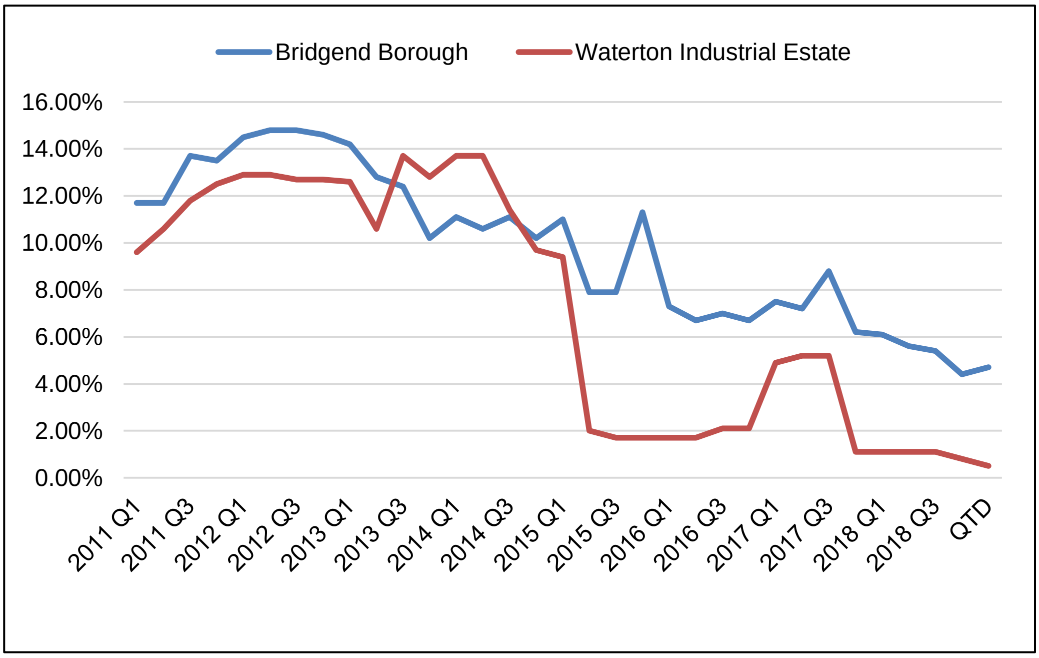


Source: CoStar, 2019

Waterton Industrial Estate

5.59 Figure 5.10 shows that the floorspace vacancy in Waterton Industrial Estate is currently at 0.50%. this is significantly lower than the borough-wide average of 4.70%. Between quarter 1 and quarter 2 2015, floorspace vacancy fell by 7.0%. This was due to Owens (logistics) taking 166,000 sq ft of space at the estate. CoStar is currently reporting 5 units available at the estate, with 4 units at Waterton Buildings ranging between 5,000 and 9,000 sq ft, and a 45,000 sq ft unit at Aviation House. Asking rents at Waterton Buildings are £3.00 psf.

Figure 5.10 Waterton Industrial Estate vacancy rate

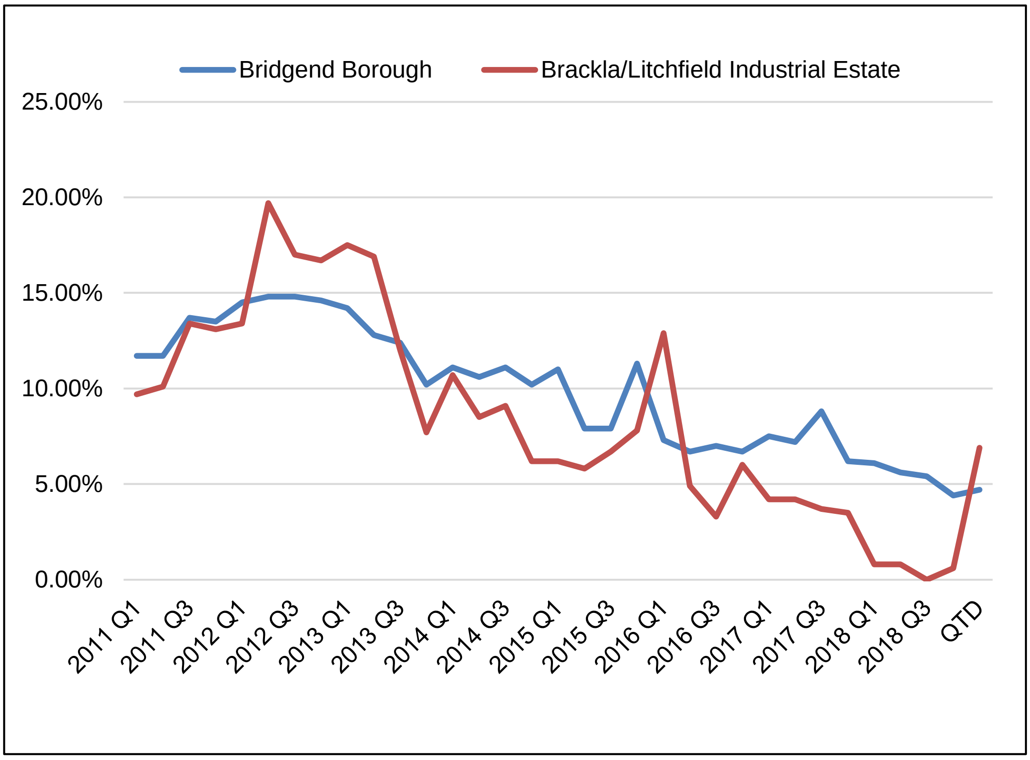


Source: CoStar, 2019

Brackla/Litchfield Industrial Estate

5.60 Figure 5.11 shows that the floorspace vacancy in Brackla and Litchfield Industrial Estates have been on an overall downward trend since 2009, with periods of fluctuations between quarter 1 2012 and quarter 4 2013. This is similar to the vacancy trend of the borough. Vacancy currently stands at 6.90% which is higher than the borough wide vacancy of 4.90%. CoStar is currently reporting 12 units available to let.

Figure 5.11 Brackla/Litchfield Industrial Estate vacancy rate

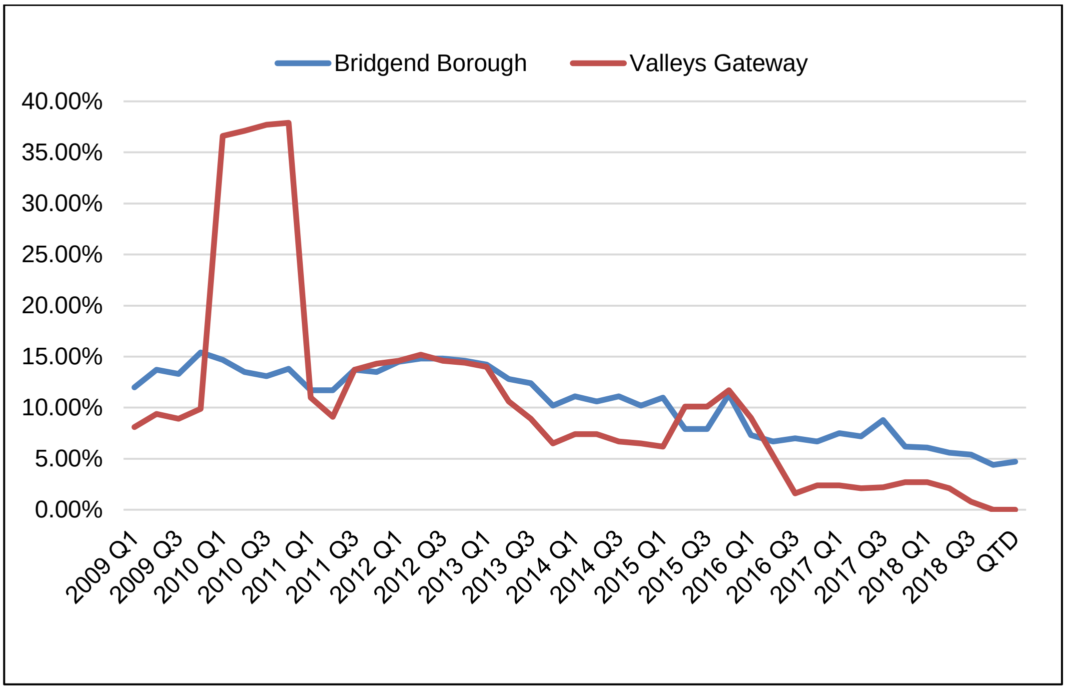


Source: CoStar, 2019

Valleys Gateway

5.61 Figure 5.12 shows that floorspace vacancy at Valleys Gateway has generally followed the trend of the borough-wide vacancy. There was a big spike and drop in vacancy between quarter 4 2009 and quarter 1 2011. This was due to a 110,000 sq ft unit at Abergawr Road becoming vacant and then subsequently being taken up by an undisclosed occupier. This is an outlier as most of the units in the area are sub 10,000 sq ft. CoStar is reporting one 10,000 sq ft light industrial unit for sale at Brynmenin Industrial Estate/ There are no other vacant units in any other parts of the area.

Figure 5.12 Valleys Gateway industrial vacancy rate

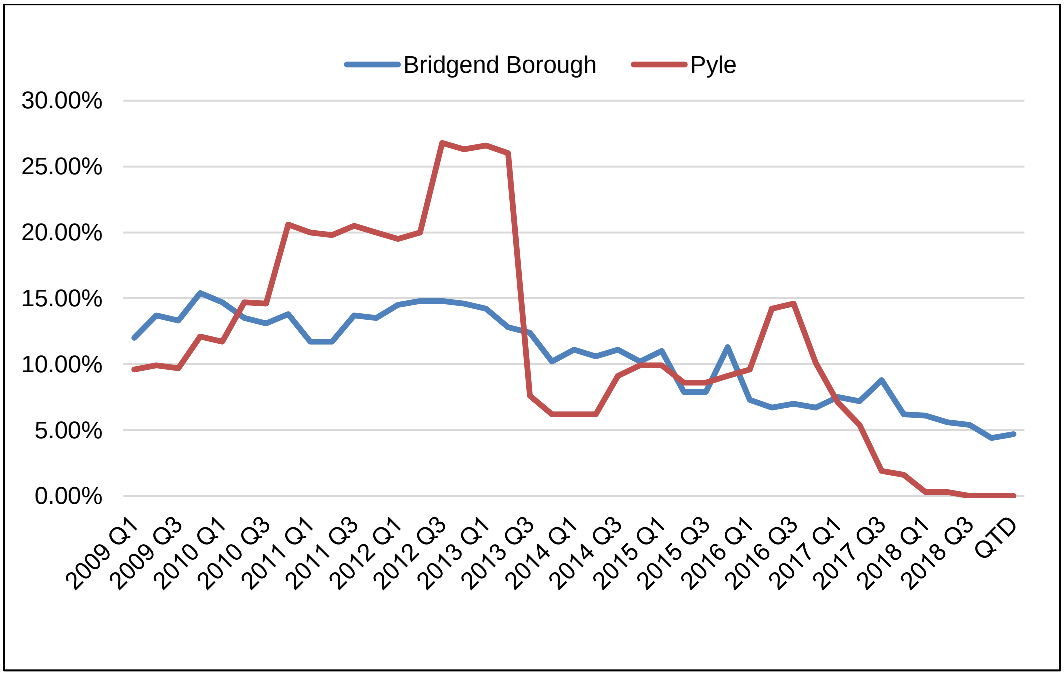


Source: CoStar (2019)

Pyle

5.62 Figure 5.13 shows that floorspace vacancy in Pyle has been wide-ranging since 2009, reaching a high of 26.00% in quarter 3 2012 with zero vacancy currently being recorded on CoStar. This is significantly lower than the borough-wide average of 4.70%. This indicates a lack of industrial supply in the area.

Figure 5.13 Pyle industrial vacancy rate

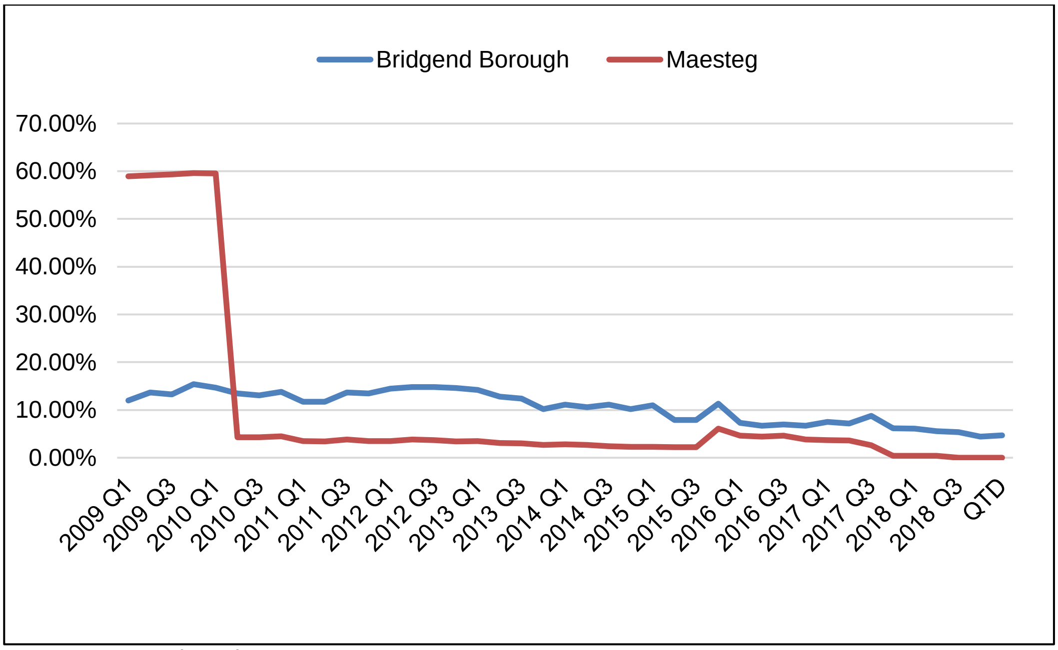


Source: CoStar (2019)

Maesteg

5.63 Figure 5.14 shows that floorspace vacancy has been consistently below the borough-wide figure since quarter 2 2012. Between quarter 1 and quarter 2, the vacancy rate dropped significantly due to Bridgend County Borough Council purchasing 163,000 sq ft of industrial space at Ewenny Industrial Estate, the former Revlon/Cosi factory which they subsequently demolished. CoStar is currently reporting no vacant or available units in the town. This is not a cause for concern given the relatively weak nature of the market.

Figure 5.14 Maesteg industrial vacancy rate

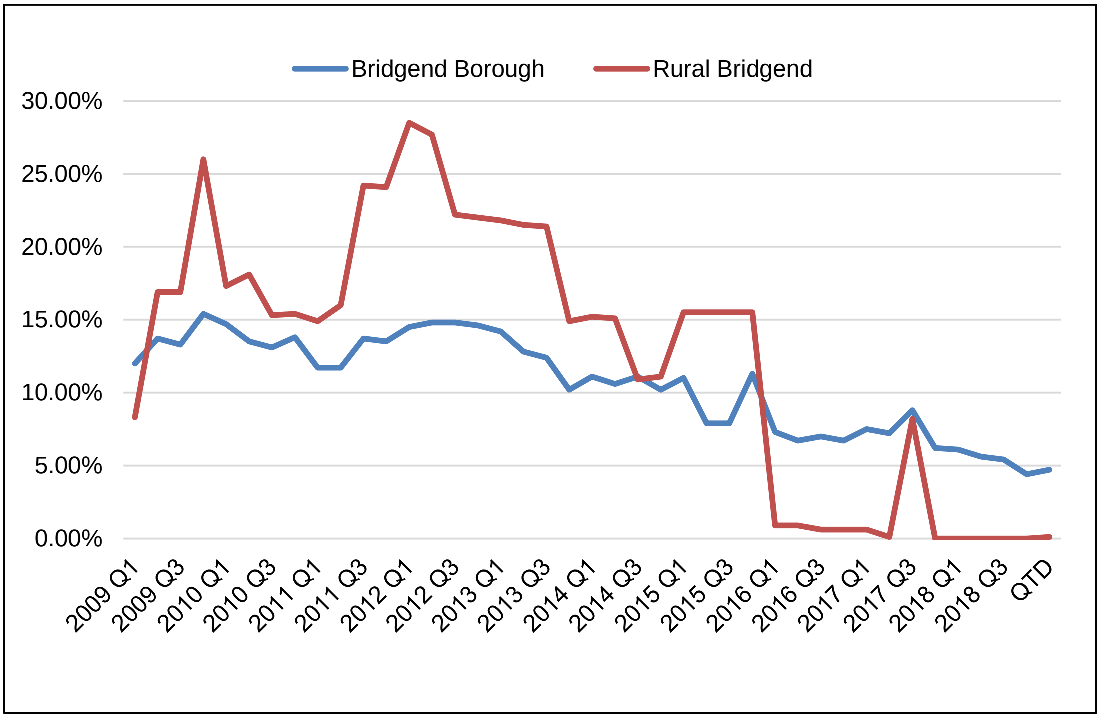


Source: CoStar (2019)

Rural Bridgend

5.64 Figure 5.15 shows that floorspace vacancy in the rest of the borough has fluctuated significantly since 2009, reaching a high of 28.50% in quarter 1 2012 and now falling to zero vacancy. This illustrates the tightness of supply across the rural parts of the area as a whole.

Figure 5.15 Rural Bridgend industrial floorspace vacancy



Source: CoStar (2019)

Development opportunities

5.65 The development opportunities are to be found both within the existing estates and on cleared brownfield sites and greenfield sites (serviced and un-serviced) across the Borough. The potential from the undeveloped land parcels to contribute employment floorspace is discussed in the supply chapter that follows. Here we set out our analysis of the premises and land that is currently being actively advertised.

Bridgend Town

5.66 There are a number of development opportunities throughout Bridgend town that include:

- Waterton Industrial Estate (Reg1(8) – the main potential development opportunity will depend on the existing Ford site becoming vacant. The current size of the Ford factory means it is unlikely to be suitable to a single occupier and would need to be subdivided into smaller units. The factory’s current layout is likely to mean that major works will be required to subdivide the unit – which could be economically unviable given rents in the area. Viability for the buildings’ re-use could be challenged further due to their age and the recent changes to MEES. Since last year changes to MEES means that non-domestic properties requiring an EPC rating of in excess of F. This could mean additional improvements are required to the buildings to enable them to be reoccupied.
- Parc Afon Ewenni (REG1(6) and PLA3(4) part of Waterton Industrial Estate) – in terms of current availability, the Dovey Group is promoting a mixed-use scheme to comprise 26,000 sq ft of light industrial space over 2 units, a terraced of 6 trade counter units of 3,500 sq ft each, drive-thru / roadside uses and undefined “pod

space." Given Waterton Industrial Estate's existing occupiers and its motorway access, the industrial opportunity is attractive to occupiers. But given the proposed unit sizes they will need to come forward on a speculative basis to attract occupiers on a leasehold basis or sold to an owner occupier.

- Bridgend Industrial Estate (REG1(2))– there are a number of plots being advertised as follows:
  - Plot G11 – Bennett Street is a 2.14 hectares site being advertised for possible office/industrial development.
  - Plot 2000, 3000 and 4000 at Central Park Bridgend are currently being marketed for potential industrial development for requirements up to 100,000 sq ft.
  - Plot G12 – Kingsway is a 1.74 hectares site also located is available for potential trade counter and industrial uses.

  Given Bridgend Industrial Estate's existing occupiers and its motorway access, the industrial opportunity is attractive to occupiers. Again, given the size of the sites development would need to come forward on a speculative basis to attract occupiers on a leasehold basis or sold to an owner-occupier.
- Brackla Industrial Estate (REG1(1) and PLA3(2)) – agent's Lambert Smith Hampton are currently advertising 5.7 hectares of development land at Brackla West for mixed employment use along with a smaller 1.24 hectares site fronting Coity Bypass. Again, given the size of the sites, development would likely to need to come forward on a speculative basis to attract occupiers on a leasehold basis or sold to an owner-occupier.

Strategic site

5.67 Brocastle (SP9(1)) – greenfield site owned by the Welsh Assembly Government is being promoted for a range of employment uses. The site is 46.2 gross hectares, but due to its typography and shape, there is 20.4 net hectares available for employment uses. The Council has indicated that there is potential interest from Heathrow to use it as a hub site for the construction of the new runway and a private individual who is looking to develop a new off-road 4x4 vehicle. Furthermore, the Welsh Assembly Government has indicated it may consider servicing the site to open it up for development.

Valley Gateway

5.68 Brynmenyn Industrial Estate (REG1(18)) – 0.38 hectare site is currently being advertised suitable for a variety of employment, retail and leisure uses. Given the site access to the motorway, it could be attractive to a small industrial occupier. The potential of this estate for employment expansion is discussed in the Supply chapter that follows.

Pencoed

5.69 Pencoed Technology Park (SP9(3)) – site is owned by the Welsh Assembly Government and is partly within the Borough and partly in neighbouring Rhondda, Cynon & Taff, and part occupied by the Sony camera manufacturing and technical support service.

5.70 Knight Frank are currently advertising nine greenfield serviced plots for sale on a freehold basis that cumulatively sum to around 17.5 ha, but just two of these plots (5 ha) are in the Borough. Given these plots' proximity to junction 35 of the M4, and that they are greenfield and fully serviced, these will be attractive to a range of occupiers.

Maesteg

5.71 Watts & Morgan are currently advertising 0.32 hectare brownfield site at Forge Industrial Estate, Maesteg (REG1(11)) for B1, B2 and B8 uses. Given viability and occupier demand this site will be challenging to bring forward for development.

Rents

5.72 Industrial rents across the borough typically range between £3.00 - £6.00 psf. With agents reporting the general tone to be around £4.50 psf. There is evidence of higher rents, such as City Electrical Factors taking a sub-let for Top Tiles at £6.50 psf for a trade counter unit but this is not the market norm.

5.73 At these levels new build development is not viable except on a pre-let basis to a blue-chip covenant on onerous lease terms. These rents are generally sufficient to maintain the existing stock. Agents report that rents would need to be around £7.00 psf to stimulate development.

Conclusion

5.74 The industrial sector is the focus of the employment market in Bridgend. There are a number of large occupiers across the Borough many of which are located here for historic reasons. The Borough industrial market covers a wide range of sectors that include manufacturer and distribution. The focus of demand for space is generally around Bridgend Town and Valleys Gateway. These areas have the greatest choice of stock and are well located to connect to the eastern part of the M4 motorway. The rest of the Borough's industrial areas are secondary in comparison. There is evidence of space being taking across a range of unit sizes, this more a reflection of what stock there is available at the time of the enquiry and its price point. Overall demand for industrial space is weak, despite supply tightening over recent years.

5.75 Current vacancy rates across the Borough are reasonable and there is space available in the keys areas to the east of the Borough in Bridgend Town and Valleys Gateway. These areas also have available greenfield and brownfield serviced land to bring forward new development.

5.76 New space has not been speculatively brought forward because rents have not risen to a sufficient level to stimulate viable development. Space in the Borough will only be brought forward if there is a pre-let in place to a blue-chip covenant, land sold to an owner-occupier or there is public sector intervention to help gap fund the development.

5.77 Due to a lack of viability for new development existing space will need to be refurbished to continue to attract occupiers, which is possible at the current achieved rents. If the Ford site does close or partially close how much stock is released into the market will depend on whether the buildings can be suitably reconfigured to meet local need and energy efficiency requirements.

5.78 The Welsh Assembly Government site at Brocastle presents a good new greenfield opportunity, albeit infrastructure investment is needed to open up the site. If a pre-let/pre-sale cannot be secured further intervention may be required to speculative build units to attract occupiers.

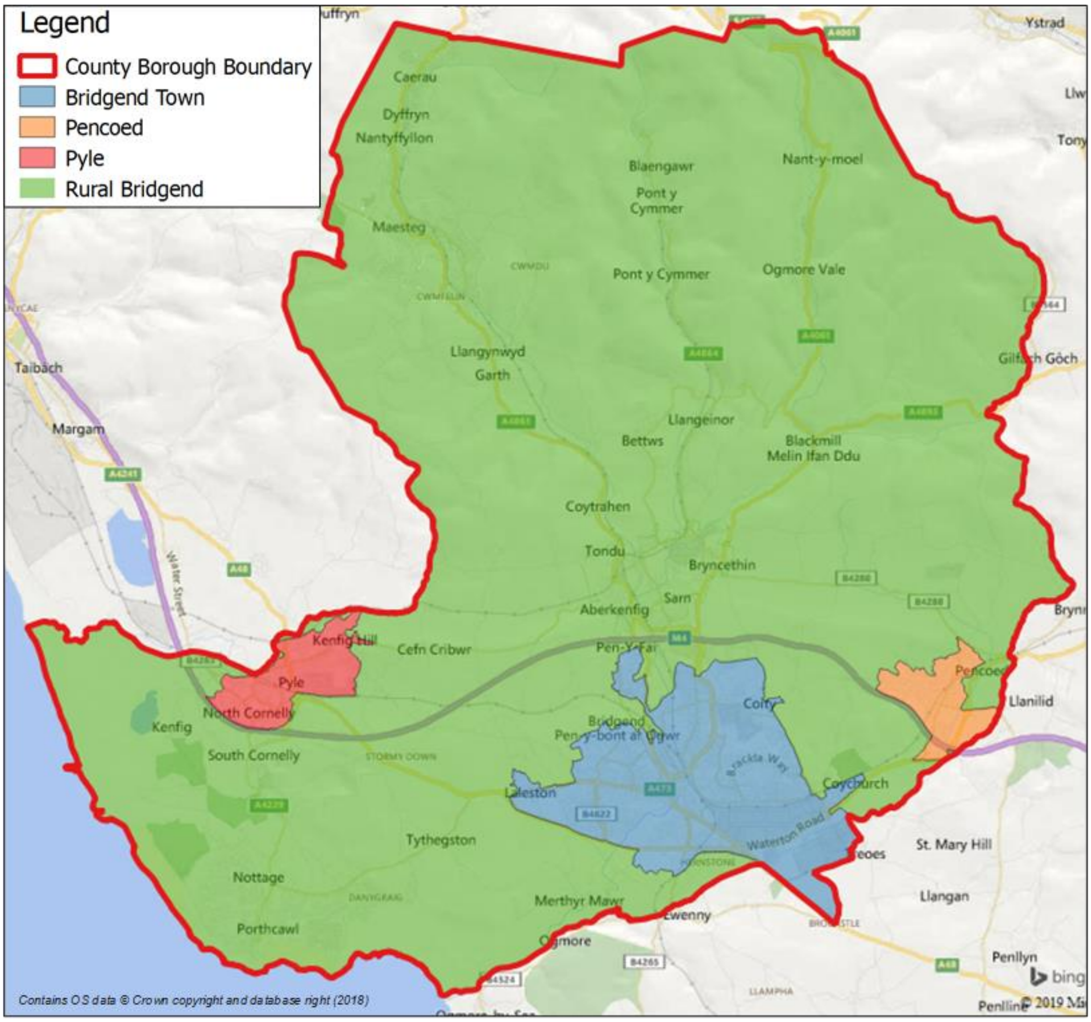
5.79 The planned sustainable urban extension in neighbouring Rhondda Cynon Taff, which could deliver 10,000 new homes is likely to bring demand for new employment space, especially those sites located further east in this Borough i.e. around Pencoed, Bridgend Town and Valleys Gateway – all of which have available serviced sites. But this is pending the progress of this through their local plan and that some of this labour may be attracted into Bridgend. At the moment, because this is only a proposal with no status we have not, when calculating 60ha of land in the next plan made any provision for additional cross boundary workers to commute into Bridgend.

Offices

National context

5.80 There is a lack of transactional and vacancy data on CoStar for office properties for the Maesteg area identified in Figure 5.1Figure 5.1 to allow for any meaningful analysis. Therefore we have combined the Maesteg area with the Rural Bridgend as shown in Figure 5.16.

Figure 5.16 Defined office locations for market analysis



Source: OS, Bridgend County Borough Council, AspinallVerdi (2019)

5.81 As with industrial space, developers are finding it more difficult to fund office development due to the strict nature of the lending markets. Speculative office development is only occurring in strong and established office markets. There is evidence of speculative office building in London, Thames Valley (e.g. around Reading) and key regional centres such as the Birmingham and Manchester. In other markets, new development requires a pre-let in place to a blue-chip covenant.

5.82 In recent years the main drivers of demand for new office space have been from finance, professional services, Technology, Media and Telecommunications (TMTs) and flexible workspace providers. Since the referendum to leave the European Union there has been a slight cooling of office demand from finance and professional services, but demand from TMTs and flexible workspace providers remains robust. Knight Frank reports that office occupiers in the regional office centres were beneficiaries of a “perfect storm”[22] of pressure from digital businesses and economic uncertainty which changed occupier attitudes towards more cost-effective

[22] Knight Frank, UK Regional Cities Office Market Review 2018

locations. This led to a higher level of activity than was seen in the months after the EU referendum.

South Wales as an office location

5.83 The focus of the South Wales office market is Cardiff, this the main area which attracts major occupiers which are prepared to commit to pre-lets which enables viable new build development.

5.84 Cardiff has seen pre-lets occurring with the BBC taking 170,000 sq ft of space and HMRC taking 266,000 sq ft of space both at Central Square, the latter being Wales' largest ever office deal.23 CoStar report that Admiral is to expand, taking 65,000 sq ft at 3 Capital Quarter (completion due 2019) and law firm Geldards is taking 30,000 sq ft at 4 Capital Quarter (completion due 2020).

5.85 As shown in Figure 5.17 prime office rents in Cardiff have increased by 25% since 2008, with current rents at £25.00 psf. Prime rents in Cardiff are lower than the other regional cities shown in Figure 5.17.

Figure 5.17 Prime Office Rents 2008-2017

	Birmingham	Bristol	Cardiff	Edinburgh	Glasgow	Leeds	Manchester
2008	£33.00	£26.00	£20.00	£29.00	£28.50	£25.00	£29.00
2009	£27.50	£27.50	£21.00	£28.00	£26.00	£25.00	£28.00
2010	£28.00	£27.50	£21.00	£27.50	£26.50	£25.00	£28.50
2011	£28.50	£27.50	£22.00	£27.00	£27.50	£25.00	£30.00
2012	£28.50	£27.50	£22.00	£27.00	£27.50	£25.00	£30.00
2013	£28.50	£27.50	£22.00	£29.50	£28.00	£25.00	£31.00
2014	£28.50	£28.00	£22.00	£30.00	£29.00	£26.00	£32.00
2015	£30.00	£28.50	£24.00	£31.00	£30.00	£26.50	£34.00
2016	£32.00	£28.50	£25.00	£31.00	£29.50	£27.50	£34.00
2017	£33.00	£32.50	£25.00	£32.00	£30.00	£28.00	£34.00

Source: JLL, South Wales Report (2018)

Bridgend as an office location

5.86 Bridgend does not have a strong office market. Large occupiers are here for historic reason, government incentives or availability of good quality space at reasonable rents. The majority of space is occupied by smaller companies across a range of

[23] CoStar (27 March 2019) Cardiff Submarket Analysis

sectors. There is no significant quantum of offices found in the areas of Valleys Gateway and Maesteg identified in Figure 5.1 therefore this is excluded from our analysis.

Bridgend Town

5.87 Offices in Bridgend Town are found around the town centre/railway station in out of town locations. The out of town stock is mixed, being on both dedicated office parks and mixed employment areas interspersed with industrial uses.

5.88 As illustrated in Figure 5.18 office space varies in terms of quality, specification and age. Although some of the space is dated, due to no new build occurring for a number of years, the stock is generally of reasonable quality.

Figure 5.18 Office space - Bridgend

Derwen House - Court Road	Derwen Road, Bridgend
	

Source: CoStar, EGi (2019)

5.89 Occupiers in the town centre include Call Centre Ox Limited (communication) who have a 3,200 sq ft unit, Remploy Limited (business services) who have a 2,900 sq ft unit, Hello Consulting (consulting) who have a 1,700 sq ft unit and Magenta Financial Planning Limited (business services) who have a 1,400 sq ft unit.

5.90 The out of town office market is predominantly found at Bridgend and Waterton Industrial Estates. Despite these areas being predominantly industrial uses, they contain the largest number of dedicated office buildings in the Borough with CoStar reporting 27 office buildings in the area. The buildings vary in age, specification and quality. Examples of space include Dragon House at Bridgend Industrial Estate which was built in 1960 and Waterton Park, which comprises office buildings that were built in 2007. Occupiers here are from a range of sectors, but they are generally local businesses and regional occupiers. Occupiers include South Wales Police (government) who occupy 6,250 sq ft of office space, The Mulligan Community (personal services) who occupy 4,300 sq ft of space, Chuck Steel (motion picture production) who occupy 23,700 sq ft of space and Mirus Wales (charity) who occupy 2,900 sq ft of space.

5.91 A smaller quantum of office space is found at Bridgend Science Park and Brackla Industrial Estate. Despite “badged” as a science park, occupiers at Bridgend Science

Park are not necessary science related such as 3M (healthcare), Severn Trent Water (utilities) and CGI (IT). The main office building at Brackla Industrial Estate is Principality House, which is a 1999 purpose-built office of 10,000 sq ft over two floors, which is sub-divided into smaller units.

Pencoed

5.92 Offices in Pencoed are primarily found at Bocam Park. As shown in Figure 5.19 Bocam Park is a dedicated office park with a mix of age of units, located adjacent to junction 35 of the M4 motorway. Bocam Park is one of the few locations in Bridgend where new office development is possible, with development land available for large requirements. Bocam Park comprises a mix of local, regional and national occupiers across a range of sectors. Occupiers here include NHS (government), Thomson Directory (communication) and Rock (IT).

5.93 Located adjacent to Bocam Park is Pencoed Business Centre, which comprises a 51,000 sq ft purpose-built office space which currently occupied by ReNeuron as a call centre.

Figure 5.19 Office space – Pencoed

Bocam Park	Pencoed Business Park
	

Source: CoStar (2019)

Pyle

5.94 The office market in Pyle is predominantly at Village Farm Industrial Estate. Village Farm Industrial Estate is a mixed industrial and office location. As shown in Figure 5.20 the estate comprises a mix of small office buildings with occupiers local and national firms. Occupiers include JHB Business Services Ltd (bookkeeping) who occupy a 1,165 sq ft unit and One Vision Digital (communications) who occupy a 3,600 sq ft unit.

Figure 5.20 Office space - Pyle

Village Farm Industrial Estate	Village Farm Industrial Estate
	

Source: CoStar (2019)

Rural Bridgend

5.95 Rural Bridgend covers the rest of the Borough not included in the other defined areas above. The majority of occupiers are small, located in various villages and towns throughout the borough e.g. Porthcawl, Maesteg, Pontycymer and Brynmenyn. Occupiers in these areas vary but are predominantly local professional services including accountants and solicitors. Most of the offices are not purpose-built units. Occupiers include Whitsole who occupy 3,000 sq ft of space in Tondu, Premier Commercial Wealth Management (management consulting) who occupy a 580 sq ft unit at Merthyr Mawr Estate and Seren Support Services (healthcare) who occupy a 1,000 sq ft unit at Tythegston.

Figure 5.21 Office space - Rural Bridgend

Ogmore Vale	Former Regal Cinema, Maesteg
	

Source: CoStar (2019)

Demand

5.96 Demand for office space in Bridgend follows a similar pattern to the wider South Wales area. But generally, there are fewer corporate requirements than compared to Cardiff with requirements tending to be for smaller units. This corresponds with the type of stock available, with a majority of office units attracting both SMEs and local businesses. Larger requirements which are satisfied in Bridgend tend to be due to there being existing premises available and/or government incentives.

5.97 Table 5.4 shows that between 2014 and 2018 the annual office take-up averaged 19 units / 59,529 sq ft. Take-up in 2014 was particularly high. This was due to an occupier taking 51,366 sq ft of purpose-built offices at Pencoed Business Park and Chuck Steel Ltd taking 23,665 sq ft at Bridgend Industrial Estate.

Table 5.4 Bridgend- annual office take-up 2014-2018

Calendar year	No. of transactions	Total take-up sq ft
2014	23	116,197
2015	12	31,080
2016	21	35,580
2017	20	54,162
2018	18	60,624
Total	**94**	**297,643**
Annual average 2014 - 2018	**19**	**59,529**

Source: CoStar (2019)

5.98 Table 5.5 shows that there have been reasonable levels of take-up of office space across the smaller sub 5,000 sq ft size bands over the 2014 – 2018 period.

Table 5.5 Bridgend - annual office take-up by size, 2014-2018

Size range sq ft	No. units	% of units by size
up to 1,000	27	29%
1,001 - 2,000	29	31%
2,001 - 5,000	28	30%
5,001 - 10,000	6	6%
10,001 - 20,000	1	1%

Size range sq ft	No. units	% of units by size
20,001 - 50,000	3	3%
Total	94	100%

Source: CoStar (2019)

Bridgend Town

5.99 Demand for office space in the town centre of Bridgend is predominantly for smaller units with larger requirements focusing on the stock at Bridgend and Waterton Industrial Estates. Occupiers are attracted to the town centre due to access to amenities and public transport. Occupiers attracted to the out of town stock require larger/ purpose-built premises, with on-site car parking and with good access to the motorway.

5.100 Occupiers in Bridgend Town recently taking space include Broadcast Traffic Systems (data processing) taking 4,200 sq ft of space at Bridgend Industrial Estate on a 10- year lease, Call Centre Ox (administration) taking 3,100 sq ft of space at Tremains Road on a 5-year lease and Our Health Kare (TMT) taking 520 sq ft of space in Bridgend town centre on a 3-year lease.

Pencoed

5.101 Demand for office space in Pencoed is mostly focused at Bocam Park, occupiers are attracted to the park due to its co-location of other office units, quality of units, and good access to the M4 motorway. Occupiers recently taking space in Bocam Park include Skanska (construction) taking 6,225 sq ft of space on a 10-year lease, Keepmoat (construction) taking 3,000 sq ft of space, and APEM (aquatic consultancy) taking 1,600 sq ft of space on a 5-year lease.

Pyle

5.102 Demand for office space in Pyle is limited, but is from businesses servicing the local area. CoStar has recorded only two transactions for office space in Pyle since 2014. One transaction was 3,600 sq ft of space taken by Little Footsteps Nursery at Village Farm Industrial Estate on a 5-year lease from December 2019.

Rural Bridgend

5.103 The majority of demand in Rural Bridgend is from small local professional services looking for space in the villages. These occupiers do not usually require a modern purpose-built space, and will occupy more dated or converted accommodation. Occupiers recently taking space include Seren Support Services (healthcare) taking 1,000 sq ft at a converted church building in Tythegston on a 3-year lease and Premier Commercial Wealth Management taking 520 sq ft of space at Merthyr Mawr Estate.

Supply and market balance

Overview

5.104 Table 5.6 shows that there are 28 office units currently available in the Borough, providing a total of 50,869 sq ft of floorspace. This is against a total stock of 729 units / 1.16 million sq ft registered on VOA. This equates to a current vacancy rate of 4.4% of floorspace and 3.8% of number of units. If we cross-reference the availability in Table 5.6 with annual average take-up in Table 5.5 of 59,529 sq ft / 19 units the availability across the local authority equates to around 1-year and 6-months supply in relation to number of units and 10 months' supply in relation to floorspace. Again, vacancy in terms of floorspace and number of units, in relation to the relatively strength, of the market is reasonable.

Table 5.6 Availability of office space

	Floorspace sq ft	No. of units
Total stock	1,163,440	729
Availability	50,869	28
	4.4%	3.8%

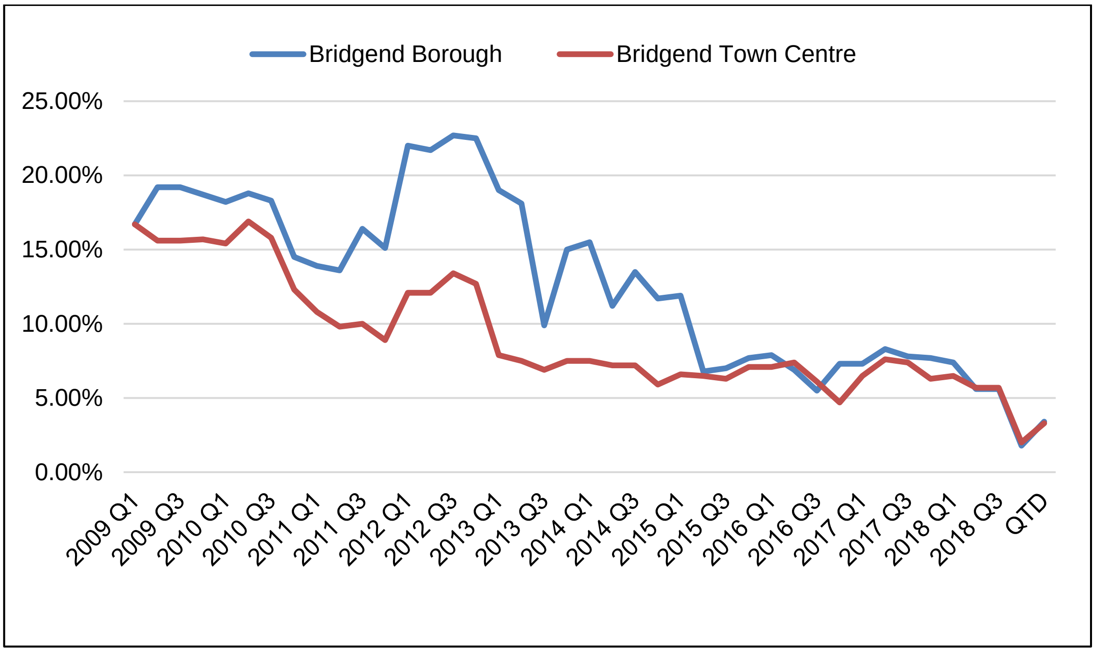
Source: CoStar, VOA, AspinallVerdi (2019)

Bridgend

Bridgend Town Centre

5.105 Figure 5.22 shows that the vacancy rate on a floorspace basis in Bridgend Town Centre has been on a downward trend since reaching a high of 16.70% in quarter 1 2009. The Town Centre trend is in line with the Borough-wide trend. The high vacancy rate was a result of the global financial crisis which led to a weakening of the occupier market. The current floorspace vacancy in the town centre is 3.30% Available units at the town centre range between 645 sq ft and 4,700 sq ft with a majority of units being sub 2,000 sq ft all of the available units are second-hand units within existing office buildings or converted residential buildings.

Figure 5.22 Bridgend Town Centre office floorspace vacancy

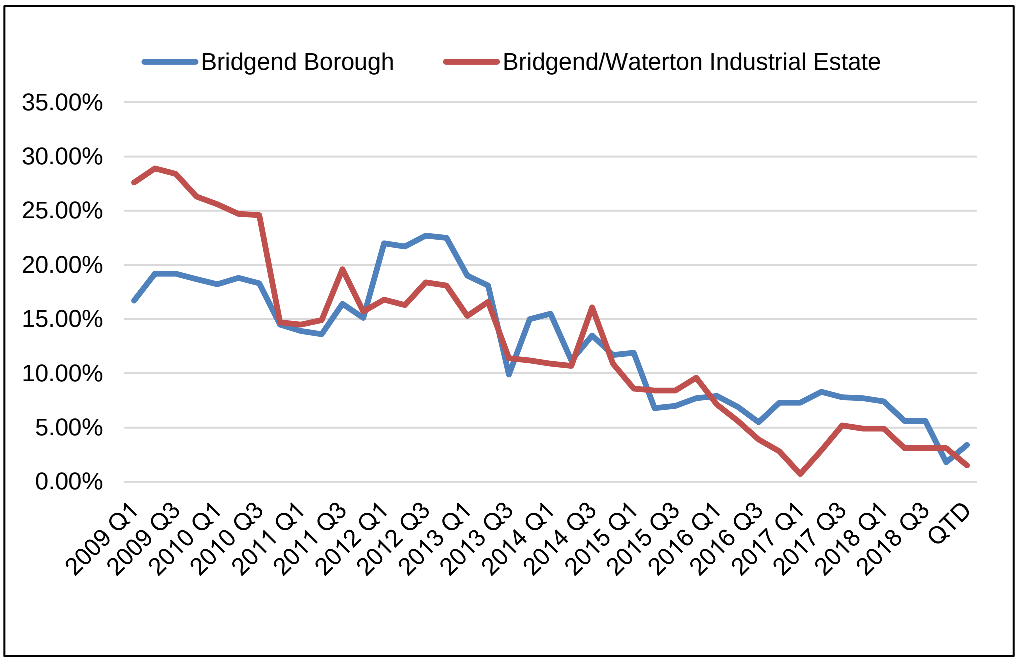


Source: CoStar (2019)

Bridgend & Waterton Industrial Estate

5.106 Figure 5.23 shows that floorspace vacancy at Bridgend and Waterton Industrial Estates currently stands at 1.50%. This is around half of the of the Borough-wide vacancy rate which is currently 3.40%. Since 2009, vacancy at Bridgend and Waterton Industrial Estates have been on a downward trend which is consistent with most areas of the borough. Despite of this trend, no new office development has occurred in this area in recent years due to issues with viability. There are also no large single occupiers with most of the units being small at less than 3,000 sq ft. CoStar is currently reporting 7 available office units in the area. Units range between 538 – 2,400 sq ft. Units are all second-hand units contained within dedicated office buildings.

Figure 5.23 Bridgend & Waterton Industrial Estate office floorspace vacancy

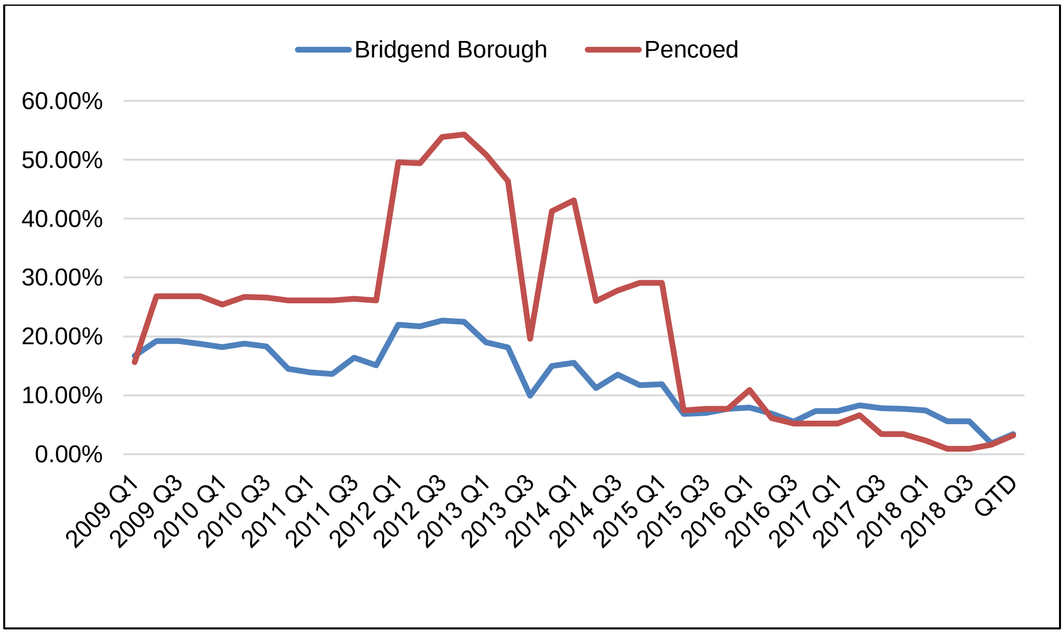


Source: CoStar (2019)

Pencoed

5.107 Figure 5.24 shows that current floorspace vacancy stands at 3.20%. this is in line with the Borough-wide vacancy of 3.40%. Bocam Park and Pencoed Technology Park contain some of the best quality office units in the borough. There are currently 5 units available on CoStar. These units' range between 592 – 3,500 sq ft. 3 of the units are in Bocam Park with the remaining 2 units at Pencoed Technology Park. The units at Pencoed Technology Park are small at 592 and 594 sq ft.

Figure 5.24 Pencoed office vacancy rate



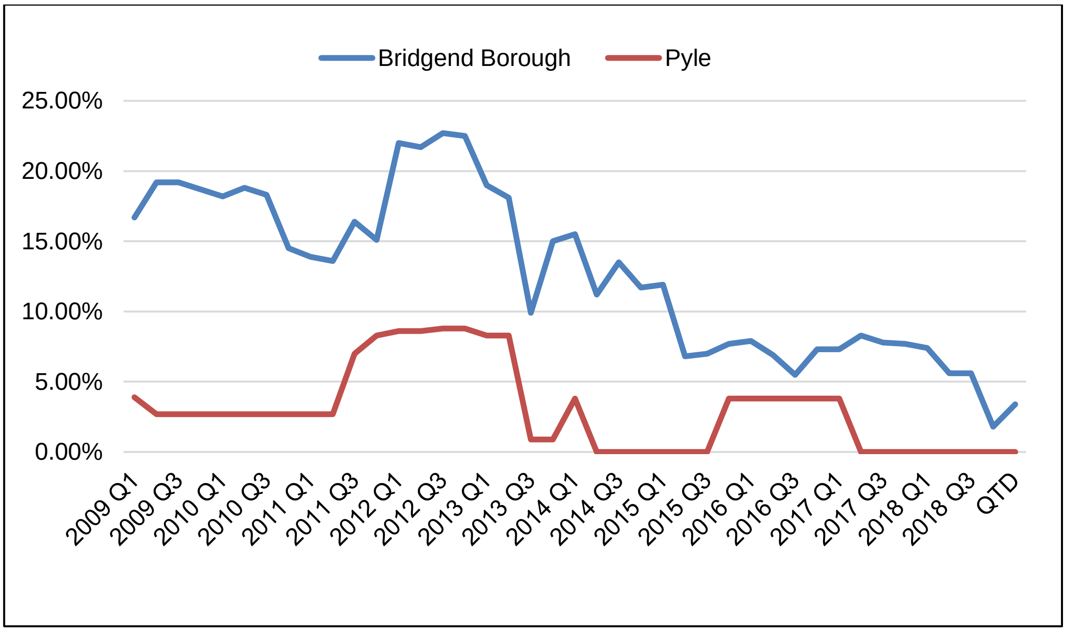
Source: CoStar (2019)

Pyle

5.108 As illustrated in

5.109 Figure 5.25 there are currently no vacant offices in Pyle. This has been the case for large periods of time since 2014. There is not a strong demand for office space in Pyle, therefore, the nil vacancy is not a concern.

Figure 5.25 Pyle office vacancy rate

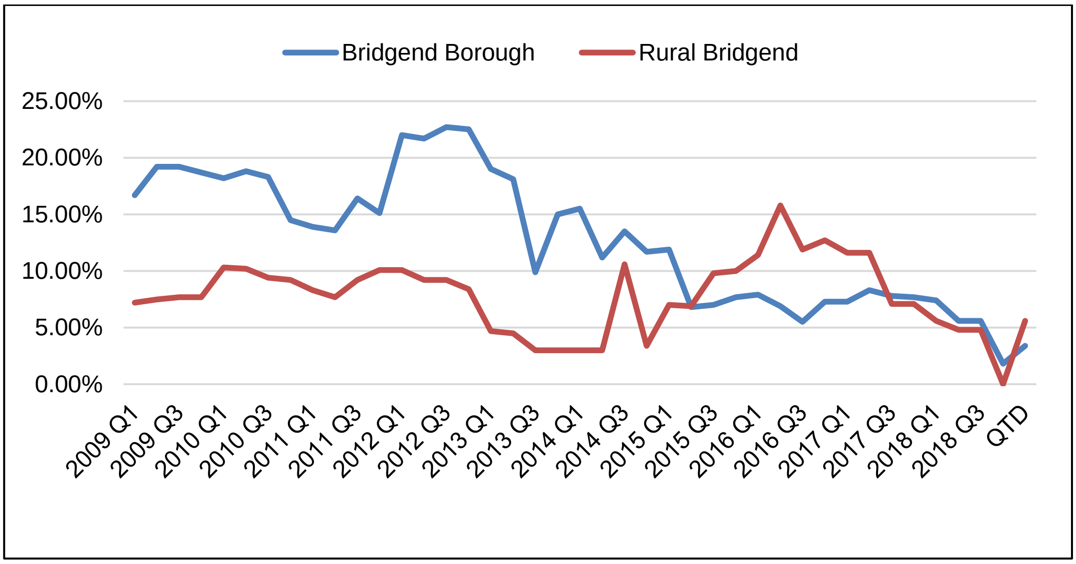


Source: CoStar (2019)

Rural Bridgend

5.110 Figure 5.26 shows that floorspace vacancy in Rural Bridgend has consistently been lower than the borough-wide vacancy since 2009 except for a period between 2015 and 2017 where vacancy was higher. Figure 5.26 shows that CoStar reports a vacancy rate of 5.60% for quarter 1 2019, which is higher than the borough-wide average. But this is not a cause for concern given the historic trend of the area and that the rural market is relatively small, meaning that one or two vacancies can easily distort the vacancy rate figure.

Figure 5.26 Rural Bridgend office vacancy rate



Source: CoStar (2019)

Development opportunities

5.111 Many of the development parcels identified in the industrial section could also be brought forward for office use, but the key development opportunities are the following at the M4 J36 - Pencoed Technology Park and Bocam Park and at Pyle.

Pencoed

5.112 Pencoed Technology Park presents a good opportunity in bringing forward new office units given the existing neighbouring uses and motorway access. As referred to above the site is in both this Borough and neighbouring Rhondda, Cynon & Taff and plots totalling some 17 ha are currently being marketed, including 5 ha in Bridgend. Together with the 1 ha left to come forward at Bocam Park, this location represents the Borough's most attractive location for out of centre office.

Pyle

5.113 Commercial property agent's Lambert Smith Hampton are currently advertising a 2.2 hectares employment site at Ty Draw Farm, North Cornelly just north of the junction 37 of the M4. The marketing details explain the envisaged quantum of space is around 65,000 sq ft of B1 space. The balance of the site has now been developed for residential. The proximity of this employment space to the residential makes offices suitable complementary use.

5.114 The office market is at its weakest in the west of the Borough, and it is not therefore unexpected that the office element will take longer to deliver. Given the allocation is for B1 uses we think there may be potential for light industrial as an alternative to a 100% office scheme on this site.

Strategic sites

5.115 As referred to above the Bridgend Science Park includes office buildings, and is almost fully built out with just 1 ha undeveloped that is dedicated to the expansion needs of existing occupier CGI. A strategic site, Island Farm is immediately adjacent to the Science Park, and its land allocation allows for a doubling of the Science Park site. However, whilst there is planning permission for a stadium plus other sports / leisure uses and 21,000 sq m office, and some of the leisure element is coming forward, there has been no known interest in expanding the Science Park through any form of B1 use. Hence as it is not being marketed we have nothing to discuss here.

Rents

5.116 Bridgend is a more affordable office location than Cardiff to the east. This is because the stock in the borough is generally more dated and there is less appetite for larger 'trophy' buildings than in more prime locations. There is no recent evidence of new build rents in the borough with second-hand rents typically ranging between £5.00 psf and £10.00 psf.

5.117 The rents across the borough make it viable to maintain and refurbish the existing stock but not sufficient to stimulate development without public sector intervention.

Conclusion: the office market

5.118 The office market in Bridgend is currently performing reasonably well, but it is a more secondary location when compared to eastern locations i.e. Cardiff. Vacancy in terms of number of units and floorspace is reasonably low. Evidence shows that the bulk of take-up comes from SMEs with a focus on locations such as Bridgend Town Centre, Bocam Park and Waterton Industrial Estate. Outside of these areas the office market has a local focus with limited modern stock.

5.119 The market signals are not sufficient to trigger new build development on a speculative basis this is because:

- Rents are only sufficient for viable development on a pre-let basis.
- The area lacks significant numbers of large-scale corporate occupiers which would de-risk the development.

5.120 The greatest opportunity for new development is at Pencoed Technology Park where there are fully serviced greenfield plots available, excellent access to the motorway and suitable neighbouring occupiers.

5.121 Again, there could be further scope to capture demand from any development of the sustainable urban extension in neighbouring Rhondda Cynon Taff.

6 LAND TO MEET IDENTIFED NEED

Introduction

6.1 The demand assessment identifies that at most 60 ha of employment land can be justified over the 15-year plan period, averaging at 4 ha per annum. This allows for 2 ha of net growth (associated with higher housing targets) and also to provide for replacement of past losses at 2 ha per year.

6.2 This is less than the 88.45 ha demand figure identified in the last Plan for the 2006-21 period that was based on an average employment land delivery of 6.33 ha per annum[24], and the 120 ha of employment land that was allocated in that plan.

6.3 We think lower past take-up in recent years means that we cannot justify the same quantum of land in this plan.

6.4 The property market assessment identified that whilst there are reasonably low levels of vacancy for both industrial and office stock, demand is generally weak. Demand is strongest in the east of the Borough – Bridgend town and Valleys Gateway, and predominantly from local SME businesses. Rents are below levels needed to stimulate speculative development, and therefore development requires a pre-let or enabling in some way.

6.5 The new community planned over the boundary in Rhondda, Cynon & Taff will improve demand, but again the focus of attraction will be on the Bridgend town and Valleys Gateway areas in the Eastern part of the Borough. However this is not yet committed. As discussed above there is merit in considering Bridgend as the employment hub for many of the potential new workers which may make a better 'joined up' planning strategy than treating this proposal as 'self contained'. Not considering such a large proposal in its functional labour market context could result in unnecessary allocation of new sites and fruitless local competition for investment.

6.6 So from the quantitative and qualitative need assessments, we know the overall scale of need and broadly where that need could best be met. In this section we look at what land should be allocated to best meet this identified need, looking at both the existing supply and possible new sites.

6.7 The detailed site data that underpins this section can be found in the Sites' assessments appended to this report.

Sites portfolio

6.8 We have reviewed the suitability of the existing employment sites portfolio.

6.9 The assessment of the suitability of Bridgend's existing employment land supply for reallocation has been informed by the ongoing Sustainability Appraisal of the emerging replacement LDP. As detailed within the Bridgend LDP Pre-Deposit (LDP

[24] See ELR 20110 table 7.1. The average for the 2000-09 period was used for the 2009-21 period and actual past take up applied to the 2006-09 plan years.

Preferred Strategy) SA Report, all existing employment land allocations have been treated as potential rollover sites and thus subject to an equal base-level assessment against sustainability and environmental criteria alongside all new candidate sites. The identification of environmental and amenity constraints through this work has informed the assessment below of the suitability of the existing employment sites portfolio, as to form an effective part of the employment land supply each site must be broadly acceptable in planning terms and deliverable.

Specialist user sites / expansion land

6.10 A small number of allocated employment sites do not form part of the normal supply as they are only available as expansion sites for single users.

6.11 This applies to the sites at:

- The Papermill at Llangynwyd where 2.3 ha is identified for business expansion, and
- 1 ha undeveloped at the Bridgend Science Park

6.12 This also applies to the 'expansion land' at the Rockwool site (Wern Tarw). This land is not developed, but in use as storage because of (current) buoyant demand. So the land forms a useful reservoir for the occupier to adjust output to meet fluctuating demand.

6.13 TAN 23 notes there is a risk that where firms are not permitted to expand on or adjacent to their existing sites there is a risk that this will harm their economic prospects. It could even force them to relocate out of the Borough should they wish to expand. In line with paragraph 2.1.7 of TAN 23 we do not consider de-allocating expansion land sites. These sites are already allocated, and so meet the basic tests of being reasonably sustainable or acceptable in planning terms. We therefore support their re-allocation and as they do not form part of the normal market, we do not count them against 'need'.

Undeveloped land on allocated employment sites

6.14 The 37 REG1 sites are mostly all currently in employment use. A number are completely built out and have no available land for additional employment. These sites could only increase the floorspace available through redevelopment that intensified the use.

6.15 Redevelopment and intensification of sites is not something we choose to rely on to meet economic needs – partly because it cannot be controlled and also because many occupiers value open storage space and yardage as much as built floorspace.

6.16 Although intensification is not credible the majority either have plots of available land for employment use such as at Village Farm, Pyle or parcels of available land that are identified to extend the existing employment area such as at Bocam Park, Pencoed.

6.17 Where there is undeveloped land available, we generally recommend the continued allocation of it. In most cases this land forms part of the 'integrity' of the larger site.

But there are a number of sites we conclude ought to be deallocated from the employment land portfolio because we cannot see that they have a reasonable prospect of coming forward in the life of the plan.

6.18 We also see merit in rationalising expectation in the north of the Borough and especially around Maesteg. The market in this part of the Borough is weak and any development challenging – most likely requiring extensive subsidy which may exceed any likely internal cross subsidy from housing on the non-employment elements of the sites. So we see some merit in consolidating the supply on the 'best' sites in the area.

Maesteg sites

6.19 Within Maesteg we consider that Ewenny Road has the best prospect of coming forward. This is a gateway site into the town, largely flat and with reasonable access that avoids routing through the town centre (for traffic southwards). It is also reasonably accessible to the rail station – although admittedly this is less important for the predominant industrial firms in the area. But may be moderately attractive for small, local office occupiers who could demand some space as part of the development.

6.20 At Heol Ty Gwyn on the western edge of Maesteg 2.9 ha of land is allocated around the depot. This land was new in the most recent plan and we think allocated in response to the Council depot which sits in the middle of the new land. However it is unclear whether the balance is actually deliverable given the topography (the depot sits at the bottom of a small valley). It is possible that access can be made to some flat land to the west but we cannot see that this would sum to 2.9 ha. Consideration should be given to releasing the site – especially as we cannot see how (unlike Ewenny Road) any enabling development could be delivered on this site.

6.21 Elsewhere in Maesteg we recommend discounting the Coegnant site, a regeneration site where the Plan considers 2 ha of employment could be delivered. We don't see any real prospect of employment uses coming forward, given there is a better option in what is an area of weak demand. However, to assist in regeneration, we suggest that the site remains a regeneration site and the Council looks to secure some small local employment should the site be developed – but we do not count this as supply with a 'reasonable prospect' of coming forward.

Other Valley Sites

6.22 The current plan allocated 4.9ha at Penllwyngwent, Ogmore Vale. But the allocated land is in an area of weak demand with poor access. Also the layout of the site is complicated by the sports pitch in its centre. This is not identified as a Regeneration site, but we recommend that the 4.9 ha has limited prospect of coming forward with any meaningful supply of new employment. So the 4.9ha cannot be considered as having a reasonable prospect of coming forwards and therefore counting as part of the 'need' figure.

6.23 Further south a small employment allocation (0.4 ha) is allocated next to the Isfryn Industrial Estate at Blackmill. This is promoted as a PLA site alongside new housing;

which following the logic of these sites should help to enable the remaining employment. We are unsure that there is demand for new units here and so whether this small allocation has a reasonable prospect of coming forward. But note that it was never the intention that this land would come forward for economic development without some housing adjacent. We note that this is the only land allocation in the small village and the intention was always that the site would only provide small local units.. So, as with the other sites discussed above we do not think the Council should rely of the land to come forward, and so counted towards the supply – but as part of a regeneration site the Council should still aspire to deliver small units to meet local needs.

Brynmenyn and Bryncethin

6.24 This part of the Borough accommodates a number of well established and sizable estates. Three of which have some additional development land including remaining land at the former Christie Tyler site (2 ha), the Brymenyn IE (6.94 ha) and Abergaw IE (1.4 ha). We think it unlikely that all three sites, over 10 ha of development land in total, will be delivered in the next plan and so some rationalisation is justified.

6.25 The Abergaw site is the final phase of a larger estate. The enabling access appears to be in place and there are no competing needs or demand for the site. This site should be retained as employment land in the next plan.

6.26 Two ha of land at Christie Tyler was intended to be delivered as a PLA site – partly alongside housing, but the small quantum of employment land expected would not appear to be integrated into the main estate to the south. We think it more reasonable that any ‘need’ is met by expanding the existing estates rather than by promoting a new, small and separated estate which is what this development would deliver. This suggests that this land is not needed for employment in the next plan – but the PLA site should contribute to the delivery of the wider economic objectives in the area.

6.27 This suggests that land should be retained on the main estate to the south (Brymeyn IE) and the land (6.94 ha) allocated as a PLA site with an expectation that this could provide a 2 ha expansion to the established industrial estate.

6.28 Combined, this cuts the land allocated in this part of the Borough to 4 ha, but with the remaining land having a better prospect of being taken up. As noted above, in return for releasing the Christie Tyler site the Council ought to seek some contribution to the Borough’s economic objectives – or else undermine the logic of the original allocation for mixed use here.

Retained sites

6.29 Thus, the 15 sites identified in the summary table below are those that have a realistic prospect of contributing to future employment land supply.

Table 6.1 Sites that contribute to future employment land supply

Site Refs	Sites	Total area (ha)	Total vacant land (ha)	Carry forward vacant (ha)
REG1(16)	Abergarw Industrial Estate, Brynmenyn	9.3	1.4	1.4
REG1(1) & PLA3(2)	Brackla Industrial Estate	42.8	7.7	7.7
REG1(2)	Bridgend Industrial Estate	128.2	9.2	9.2
REG1(18)	Brynmenyn Industrial Estate	29.3	6.9	2.0
REG1(4)	Coychurch Yard, Bridgend	2.7	0.1	0.1
REG1(25)	Crosby Yard, Bridgend	1.9	0.8	0.8
REG1(10) & PLA3(7)	Ewenny Road, Maesteg	7.7	3.5	3.5
REG1(31) & PLA3(17)	Isfryn Industrial Estate, Blackmill	2.9	0.4	0.4
REG1(22)	Land adjacent to Sarn Park Services	2.7	2.7	2.7
REG1(28) & PLA3(18)	Land at Gibbons Way, North Cornelly	1.7	0.0	0.0
REG1(21) & PLA3(10)	Land at Tondu	17.0	0.3	0.3
REG1(6) & PLA3(4)	Parc Afon Ewenni	27.0	2.0	2.0
REG1(23)	The Triangle Site, (Bocam Park), Pencoed	9.9	1.0	1.0
REG1(36)	Village Farm Industrial Estate, Pyle	44.7	2.6	2.6
REG1(8)	Waterton Industrial Estate	127.2	10.0	10.0
	Totals	**455.1**	**48.6**	**43.7**

Source: BCBC and PBA analysis

Nb Land at Gibbon Way in North Cornelly contributes only 0.03 ha of employment land.

6.30 Of the 37 sites identified in the current LDP 16 are fully built-out with no available development land contributions, and should be retained as designated and protected industrial areas.

6.31 Fifteen are capable of contributing to the supply that in total sums to 43.7 ha, some 17 ha short of the upper limit of the justifiable need.

6.32 We next turn to assess the capacity that is available in the Strategic Sites.

Strategic sites

6.33 The current Plan identifies four strategic employment sites that collectively could contribute 39 ha of new employment land. These sites and development activity since the Plan was adopted in 2013 is considered in the SP3 site reviews at in the appendix to this report.

Science Park Expansion (the Island site) – 11ha of Employment Land

6.34 One of the largest sources of potential supply in the adopted plan relates to the expansion of the Science Park. In the adopted plan land 11 ha of employment land is allocated to the west of the current estate as part of a larger 25.95 allocation for a mix of uses including leisure. As a strategic site in the plan the employment land it is protected for high profile employment uses with an expectation it would form part of an extension of the existing Science Park.

6.35 For our purposes this is somewhat of a challenge. The land in question benefits from an extant planning permission that we understand has technically commenced development. But so far very limited development has occurred and nothing a member of the public would recognise as an extension to the Science Park. As a ‘commitment’ the land currently counts against the targets in the current plan and would also count towards any reviewed plan. At worst this prevents other sites being allocated and at best inflates any oversupply position. We therefore have some reservations as to whether the site, as currently permitted for specific uses, is fully deliverable.

6.36 Viability to deliver commercial space is an ongoing issue here and the last plan relied extensively on S106 or public funding to bring forward sites. So, partly relying on internal cross-subsidy from higher value uses to help deliver the commercial space. But there is nothing obvious within the extant scheme that will deliver a financial surplus. The permitted scheme includes a tennis academy and also a large sports arena. Our view is that to deliver the scheme would require re-working of the planning permission with any new scheme looking very different to that currently with planning permission.

6.37 In normal circumstances land with planning permission would be re-allocated. But here, given the scheme is unlikely to be delivered, then this ought to be viewed as a new site and so a new rationale for (re)allocation for other suitable uses made.

6.38 Turning to a possible future for the land, to support re-allocation of new employment land here would need the case to be made that an expansion of the Science Park is realistic; that it can attract a type of occupier that would not be attracted to the Borough's other employment sites and estates. But, our property market assessment found the Science Park provided general office floorspace, and it is unclear whether the case has been made for specialist B1b floorspace, or could be made in the future. As it stands the current Science Park is very small and lacks significant market prominence. The estate does not appear to function as many other science parks do – with a shared management structure, common facilities, active links to universities and (on occasion) covenants or other tools to limit occupiers to certain 'science' sectors. Our view is that an extension, developed along similar lines to the existing estate would struggle to be defined as a science park. However, we would not wish to dash any optimism or aspiration that the Science Park can evolve into something larger.

6.39 For this reason we suggest that the Council consider de-allocating the land for employment purposes (in its current form) and, should they be willing, consider working with the landowner to scope a new proposal for a Science Park, which is viable to deliver and has a reasonable prospect of being implemented. In this scenario, where the case can be made for a new high technology cluster it would appear sensible to scope a separate policy for the land – outside the normal land identified to meet general needs. There is some logic in this given that there has been no take-up of land of the existing site for many years, and so any demand attracted to the site would be outside the projection of past trends used to derive the 'need' estimate.

Ty Draw Farm to the south of Pyle – 2.23 ha of employment land

6.40 This strategic allocation was originally part of a larger (6 ha) employment land allocation in the UDP.

6.41 As part of the plan review the owner made the case for the site to be released citing local oversupply of employment land. Looking like a compromise solution - planning permission was granted in 2014 for a mixed-use development with only 2.23 ha of new employment land. The balance of the site was released for housing with the intention that this would enable the delivery of the remaining employment land.

6.42 The residential elements have now been built out.

6.43 As a strategic site the intention is for high value uses and while the site is accessible to the motorway and may attract high value uses, we don't think it sensible to limit the sites scope to only 'high value' – the location of the site makes it attractive for more 'normal demand'; including local offices and some lighter industrial uses within the B1 use class. It is worth noting that the employment statement supporting the application also cited concerns that the 'special' policy designation of this site as a 'strategic site' in the plan was questionable – and we are minded to agree that this limitation does not appear sensible.

6.44 As a new site, whereby the residential elements and enabling infrastructure has only recently been provided we think it would be too early to conclude that the site has no prospect of coming forward over a plan cycle. When originally allocated as a PLA3 site there was no intention that it would be delivered so quickly (the land allocations made were for the whole plan period). So, while the market assessment points to general weak demand in the area, we think it reasonable to give the site more time to come forward before concluding that it should be released. In summary we see no reason to disagree with the supporting case made to the Council when the owner sought mixed use[25]:

> *"In summary, the mixed use development of Ty Draw Farm, Pyle will have a positive impact on the economic potential of the western part of the Bridgend County Borough, close to the disadvantaged community of Marlas. It will deliver serviced employment land suitable to accommodate high quality employment opportunities on a site which has lain dormant for more than two decades despite its allocation and public ownership"*

Land at Pencoed Technology Park, Pencoed – 5 ha of employment land

6.45 There remains two plots that collectively sum to 5 ha at the Technology Park. This is clearly the most attractive site in the Borough now, and stands to benefit most from the proposed new settlement across the boundary in Rhondda, Cynon & Taff. Whilst it is now 20 years since Sony built their facility at Pencoed, the Technology Park expansion immediately to the south of Sony on the junction, together with the Bocam Park development south of the motorway junction and the 'other' Pencoed Technology Park over the border in RCT are testament to the attraction of this location for tech firms. Our view is that the 5 ha site is very likely to be taken-up in the Plan period.

[25] The Economic Case for Mixed-Use Development at Ty Draw Farm, Pyle November 2012

Brocastle, Waterton – 20 ha of employment land.

6.46 This site is located immediately south of the extensive southern Bridgend industrial area that encompasses the Ford Motor works, the Waterton, Parc Afon Ewenni and Bridgend Industrial Estates. The whole site is around 46 ha, but the topography limits the developable area to around 20 ha.

6.47 Within the 20 ha the Welsh Government, as owner, is promoting a scheme for 71,000 sq m of employment space. This is currently laid out as several rows of terraces assumingly to fit the topography of this site. This appears to limit the scope for larger floorplate units – or large expanses of open yardage. This may limit the type of occupier that could take the site in the future.

6.48 We understand that several informal approaches have been made regarding an end occupier. Possibly further automotive engineering firms – drawing on synergies with the adjacent Ford plant. Or even a possible offsite construction site for Heathrow expansion. The site has a possibility to be rail linked – from the existing Ford railhead at the northern end of the site.

6.49 Given Welsh Government support, and the site's location close to the main (and generally successful) Bridgend estates this is an enabled site to reallocate in the next plan.

6.50 Thus, we recommend taking forward three of the four Strategic Sites that together will contribute 28 ha to the supply.

Existing supply summary

6.51 There is currently approximately 64 ha of remaining undeveloped REG1 land. Of this land we find 43.7 ha is suitable to re-allocate, comprising almost all undeveloped parcels within existing estates.

6.52 A further 3.3 ha of REG1 land is proposed as expansion land for two large single site occupiers – the Llangynwyd papermill and CGI within the Science Park. In these circumstances we consider this expansion land should also be re-allocated, but this should not count towards the Borough's need for land for the general employment market. These sites do not form part of the normal land supply and whether or not these are taken up depends simply on their respective owner. As existing allocated sites, we do not consider this minor over-allocation to be harmful for the development plan or wider planning strategy.

6.53 We suggest releasing/reprioritising 17 ha of allocated REG1 land as we do not consider it has a reasonable prospect of coming forward. In the Valley area we see merit in focusing the available employment land on a smaller number of sites, with the 'release' land re-allocated for mixed use regeneration. But, for these sites where we recommend release we would not expect to 'count' any possible employment land yield towards our estimate of 'need' – because the sites don't have sufficient prospect of coming forward.

6.54 Thus, we recommend allocating 43.7 ha of land to meet 'normal employment need', and a small additional to meet single user expansion opportunities (3.3 ha).

6.55 We also recommend carrying forward three of the former Strategic Sites – totalling 28 ha of land, and suggest the reconsideration of the role of the forth – the Island Farm site. As noted above this is a complex site and undeliverable in its current form. If it were re-allocated in the next plan (in whole or part) the case needs to be made that there is demand for specialist Science Park activity to warrant a new allocation and, we would suggest, a specialist policy to guide this.

6.56 In addition, we suggest re-designating the small quantum of land at Ty Draw Farm, Pyle as a 'normal' site as opposed to a 'Strategic Site'. This is because we largely agree with the case made when moving the site from a 100% employment allocation to a mixed PLA site, as part of the last Local Plan process. As part of this process the site owner (in their material supporting their application) questioned the site's status as a 'special' site within the strategic site grouping. We also have some reservations given the very modest scale of the opportunity.

6.57 Overall this means we support the re-allocation of 71.7 ha of land. This is a little less than 20% in excess of our 60 ha 'need' estimate.

6.58 Our view is that this possible over-supply should provide the Council flexibility to choose to release further sites where the planning balance may suggest that sites are better used for alternative uses. So, for example, where a site may be viewed as equally good for housing, retail or community uses, and where releasing the site for these other uses does not threaten the integrity of the remaining employment sites.

6.59 Care is needed where site owners seek to make the case to release PLA3 sites where the housing elements have been delivered, but not the employment – because part of the logic of these sites was that the delivery of housing should enable employment over the life of the last plan. Before concluding that such sites can be released for more housing it will be important to understand why the mix was not delivered, and to ensure that the employment land has been offered to the market at a fair value since the housing was delivered.

Possible New Sites

6.60 As referred to above we recommend slightly more land for re-allocation than the need. This provides some scope for the Council, on balance, to decide that an alternative non-employment use is policy preferable on around 10 ha of the land we suggest is retained.

6.61 However; there remains ongoing viability concerns with the existing sites. Developing them will continue to be a challenge. Therefore; despite the quantitative over-supply there is merit in seeking new space to be provided where it can be delivered alongside new housing or other enabling development. This is mainly because preference ought to be given to any site which can reasonably be expected to <u>deliver new space for occupation</u> over alternative allocations simply for land. In the past the Council policies sought to provide serviced land which is a different end product to new space available to let. As noted in our market review the vacancy rates for floorspace are reasonably low, and in some areas too low. So, the main barrier is getting the space viability built, to offer to the market for rent, rather than offering development land.

6.62 To support the desired population and labour market growth over the replacement LDP period it is clear that Council will need to make a number of new large housing allocations. These sites or schemes do not yet exist, but we would recommend that where new large housing land allocations are made, hand-in-hand with this active consideration still needs to be given to securing new land and floorspace for economic uses. This is to ensure that new communities have access to jobs in close proximity but also because in the current market there is a disconnect between the demand for floorspace vs land. Vacancy rates are low and there is demand for floorspace but ‘stand alone’ employment sites struggle to be delivered.

6.63 Given the probable lead in times to deliver such sites and property any provision sourced via this route will be unlikely to add to any short-term oversupply of land. If secured the space would be ‘counted’ at the next plan review and, if needed, the land balance adjusted accordingly.

6.64 We therefore suggest that where new large allocations are made for housing, then developers should be asked to make provision for new employment floorspace. This should be developed in whatever format the developer considers best fits the area – although our demand evidence would suggest offices and warehouses are the two main growing types of floorspace. The economic forecasts and market assessment both point to growth in the office sector – but this is only appropriate in parts of the Borough – particularly in the east and where access to the Motorway network is good. Elsewhere there is merit in new office space being promoted to upgrade the existing stock of property in the Borough, and especially for small firms. We find that there is demand for new small, light units that can be used flexibly for B1c, B2 or B8 that the commercial market struggles to deliver. In this scenario, where new space can be secured then there may be merit in deallocating some of the remining unbuilt allocations in the area to maintain the overall stock of land.

6.65 This approach can only apply to very large allocations, at least 500 units, as in this market even houses sometimes struggle to be viable, and employment space is only one of a long string of policy ‘asks’. The Council should look for employment sites of 2 ha or (preferably) more, so that any commercial development would have some critical mass.

Summary and Conclusions

6.66 We find that the Borough already has sufficient land allocated to meet identified need (60ha) and that some sites can be deallocated from the supply entirely, or re-designated as regeneration sites where the land supply is not relied on to meet needs.

6.67 We are cautious about continued reallocation of the Island Site as we find no evidence that expansion of the Science Park is reasonably feasible given the current mix of development permitted. But before simply de-allocating the land we suggest the Council works with the owner to see if an alternative scheme can be found, and a strategy to attract the desired uses, whereby the Science Park is able to expand. In this case the land will need a new policy designation and a mechanism to ensure the employment space is delivered alongside any other development – as opposed to offers to simply service the land because we do not think this land can be viability developed.

6.68 Despite the Borough having enough land supply we remain concerned that there is an ongoing challenge to deliver floorspace on this land. The best route to deliver new floorspace in the short term is to secure delivery via new large housing developments. So, this should actively be encouraged going forward. We would expect only a very modest additional provision via this route and it is impossible to quantify. We suggest asking for 2ha or so in larger schemes – but this will depend on the portfolio of housing sites taken forward and the viability of the scheme. The request for additional space via this route should be viewed as a positive feature, weighing in favour of sites offering this space, over those who do not. This is as opposed to a policy requirement. This is unlikely to lead to a gross over provision / oversupply but will need to be reassessed at a plan review.

6.69 It is also important in general that when negotiating any element of the employment land supply in the future, for example when approaches are made to promote mixed use schemes, then the Council should not be satisfied with simply taking serviced land – the preference should be for less land in return for actual floorspace available for occupation.

7 POLICY RECCOMENDATIONS

7.1 The previous section has recommended a new portfolio of employment sites to meet identified needs, including by releasing or repurposing some sites from the existing employment land supply. Building on this, in this section we outline some further policy recommendations to underpin a sound employment land strategy in the emerging replacement LDP. These revolve around a suggested restructuring of the policies to make them clearer, a refinement to the 'release policy' and criteria-based policies for rural sites.

General Policy Structure

7.2 The interaction between the Borough's various employment policies is complex – especially where some employment sites are promoted within wider mixed-use PLA policies, others not and some land promoted as 'strategic' for 'special uses'. The overlap between PLA policies and REG1 policies in not always clear.

Mixed use polices

7.3 We suggest that the policies are structured so that the mixed-use sites are more clearly separated from 'standalone' employment sites. Also, that more specific guidance is given about how the employment elements of the mixed-use sites are managed and marketed going forwards.

7.4 Mixed-use development is a pragmatic approach to delivering space where viability is challenging – but the logic of such allocations is that by allowing the housing (or other enabling development) the employment elements are delivered alongside.

7.5 It is unclear whether this is being achieved at the moment - over time there is a risk that the employment elements are 'decoupled' from the enabling development.

7.6 In this regard we note that PPW (2018) suggests that SPG may be helpful in guiding mixed use developments (5.4.14). We do not advocate this for every site in Bridgend as many of the mixed-use PLA sites are small, and site specific SPG would not be proportionate. It is also the case that this is not a 'catch all' solution, as housing is not always the magic solution – some parts of the Borough do not generate high enough residential development values to enable other development to come forward.

7.7 But where an allocation is made with the principle that housing (or other uses) will facilitate employment development, then it right that there should be firm and clear guidance provided (SPG or otherwise) to secure the intended mix.

7.8 To this end we suggest mixed use permissions should be coupled with a 'action plan' outlining how the employment elements will be marketed and delivered. In many cases the focus should be on delivering lettable floorspace in preference to a possible larger quantity of land.

7.9 This should first start with an applicant outlining how the proposal will enable the delivery of the employment space promoted, and showing that development is viable as part of the 'package' being offered. It should outline what steps will be taken to market the site and what minimum values have been assumed.

7.10 The strategy should extend at least five years from the date of the permission so that 'failure' can be judged as part of a plan review and not via speculative applications.

7.11 Towards the end of the period, if the site has not been delivered in line with expectations, and the owner seeks an alternative use, then they should be invited to give their reasons as to why their original strategy failed to succeed and what actions would be needed in the future to successfully deliver their mixed-use scheme. As part of this it should be remembered that, following PPW, the plan should make allocations for the 'plan period', and there is no expectation that sites allocated today will be taken up within five years (or even over one plan round). The plan review is the best place to consider the merits of 'rolling forward' allocations from one plan into another.

7.12 If the Council then agrees there is no reasonable prospect, as part of the plan review, they should take the opportunity to de-allocate the land as part of the plan review and identify (if needed) replacement land to meet identified needs.

Strategic Sites

7.13 We are recommending that only two of the four 'strategic sites' are carried forward. This is because we suggest one should be re-allocated and one treated as a 'normal' site and so not guided by the Strategic Sites criteria seeking only high value type employment. The Island Farm site, if re-allocated, needs to be viewed as an extension to the adjacent Science Park and a bespoke policy drafted to secure this. The other Ty Draw Farm, Pyle should be treated as part of the normal supply.

7.14 For the two remaining Strategic Sites, and in accordance with the national policy advice to focus investment on key settlements such as Bridgend, we would suggest site specific policies outing that Brocastle, is expected to be the Borough's main inward investment site, supported by the Welsh Government and the remaining land for further expansion of the successful wider area, and identifying the range of tech uses desired at the modest remaining land within the Pencoed Technology Park.

Loss of protected sites

7.15 The current plan permitted the loss of allocated employment land or premises in only very limited circumstances (REG2 and 3). This is mainly to D2 uses or sui generis uses.

7.16 As drafted the policies firmly prevent the loss of land to D2 – which has been a common issue here and elsewhere and can indiscriminately result in 'leisure' uses in the middle of employment sites – whereas there may be policy preferable locations for these.

7.17 But in addition, the policies should more clearly outline where applicants can demonstrate that their site does not have a reasonable prospect of being used or reused for its intended purpose, and what evidence is needed to demonstrate this.

7.18 For allocated development sites, either promoted for employment or accepted by the Inspector as reasonable sites for allocation the 'evidence bar' should rightly be set high. This it to ensure the primacy of the plan-led approach. They should not be released via speculative applications.

7.19 But for existing property, in many cases existing occupiers vacate property and the current unit layout or condition makes it difficult to re-let. Some industrial units are bespoke and so difficult to let on the open market. We note a number of such examples in our site assessments. While we suggest these sites should be protected; because they are in demand and in use today, it is right that this view is tested should they become vacant.

7.20 In our market review we find that vacancy rates are low, and so the release of existing buildings should generally be resisted. This is especially important given viability concerns about the delivery of new space, which reflects the overall weak demand – so protecting the existing stock is even more important.

7.21 The Welsh Government ELR Guidance note suggests the use of criteria-based policies to manage applications outside of protected estates. But we also see logic in applying the same criteria to manage change where buildings fall vacant within protected employment areas.

7.22 So, we suggest a new policy which manages the release of the existing stock. This should:

A) First protect property and land where it is integral to the integrity of a protected area and where introducing a non-employment use could undermine the functioning of the protected site.

B) For property which could be released without harming the integrity of a protected area – or for an isolated site (not protected via a specific employment policy) the Council should:

- Seek evidence that the property has been marketed for a period of at least 12 months at a fair market value for the area and the condition of the property.
- Where re-letting the property is not feasible by way of its layout, then require consideration of splitting, dividing or combining units to better meet local demand.
- Where the property cannot be re-let then require consideration of marketing the land for redevelopment for a new employment unit.
- Finally, where the above is not feasible, require consideration of the provision of replacement space as part of a mixed use redevelopment proposals. In the first instance developments should replace a similar type of space as lost (i.e. where industrial is lost; industrial should be replaced), but on occasion it may be appropriate to seek to retain the similar job capacity via a different form of development (e.g. small office units as part of mixed-use offer).

7.23 This provides added flexibility to respond to changing market signals and prevent sites or buildings that cannot viability be re-used from not making a contribution to housing or other needs.

Rural Policies

7.24 Planning Policy Wales encourages councils to provide criteria-based policies to guide unexpected (by the Plan Making process) requests for additional employment land, outside of allocations, especially in rural areas.

7.25 This reflects the reality that many local firms do not engage with the plan-making process because they do not need additional land at the time the plan is reviewed. For many firms this is not a problem because the plan, via its employment allocations, provides a portfolio of new sites they can move onto within the same broad areas. But in rural areas this is not a feasible policy response – not all villages or small settlements can be provided with new land allocations. Even where they are, they may be in single ownership and not made available (by the landowner) to the local firm concerned.

7.26 To address this PPW (2018) encourages the use of a rural criteria-based policy whereby the advantages of a new application, outside of an allocation, can be considered. Further details are provided in TAN 24 – section 3.1.

7.27 This policy needs to be scoped to reflect the Borough's general constraints and plan priorities. But we would suggest that here the criteria are set to afford positive weight to new applications for 'expansion' or very local re-location of firms who have operated within the settlement for a number of years (3), and where:

A) It is demonstrated that there are no suitable buildings or sites within the settlement or nearby;

B) The site is previously developed land. Or it can be demonstrated that there are no suitable previously developed sites available;

C) The proposal is justified by a business case, demonstrating that the business is viable;

D) There is a named user for the development, who shall be the first occupant secured by a planning condition; and

E) The proposal is well related to the built form of the settlement and of an appropriate scale to the settlement.

APPENDIX A SECTOR SPACE MAPPING

APPENDIX B SITE ASSESSMENTS

Pages 1-16 Employment sites

Followed by pages 1-2 Strategic Employment sites

SECTOR TO LAND USE MAPPING

1. Economic statistics and forecasts tell us nothing directly about employment space, because they do not classify jobs according to the type of space they occupy. Rather, the statistics split jobs into economic sectors (industries and services), according to the Standard Industrial Classification (SIC). To estimate how many jobs will be based in offices and industrial space, and how many in ‘non-B’ spaces such as retail premises, schools and hospitals, we need to translate sectors into land uses.

2. As the starting point for this translation we recommend a method developed by Roger Tym & Partners (now PBA) over a series of employment land reviews and tested in a large-scale study of the Yorkshire and Humber region in 2010[1]. To our knowledge there is no other published empirical research on the relationship between activity sectors and land uses.

3. The tables below show the sectors that are classified to industrial space and offices respectively. The names and numbers that identify each activity sector are from the UK Standard Classification of Economic Activities 2007 (SIC 2007)[2].

[1] Roger Tym & Partners with King Sturge for Yorkshire Forward, Planning for Employment Land: Translating Jobs into Land, March 2010

[2] http://www.businessballs.com/freespecialresources/SIC-2007-explanation.pdf

Table A1 Industrial sectors

Manufacturing		
Manufacturing and repairs	10-33	All manufacturing
	95.00	Repair of computers and personal and household goods
Other industrial		
Construction	43.2	Electrical, plumbing and other construction installation activities
	43.3	Building completion and finishing
	43.9	Other specialised construction activities not elsewhere specified (nec)
Motor vehicle activities	45.2	Maintenance and repair of motor vehicles
	45.4	Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and refuse disposal	37	Sewage
	38	Waste collection, treatment and disposal activities
Employment activities (part)	78	
Warehousing		
Wholesale trade except of motor vehicles and motorcycles	46	
Freight transport by road	49.41	
Removal services	49.42	
Storage and warehousing	52.10	
Other supporting land transport activities	52.21	
Cargo handling	52.24	
Post and courier activities	53.00	
Packaging activities	82.92	
Employment activities (part)	78	

Note

SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment.

Table A2 Office sectors

Office sectors		
Publishing	58	Motion picture production activities
Motion picture, video and TV programme activities	59.11	Motion picture, video and TV programme production activities
	59.12	Motion picture, video and TV programme post-production activities
	59.13	Motion picture, video and TV programme distribution activities
	59.20	Sound recording and music publishing activities
Programming and broadcasting activities	60	
Computer programming, consultancy and related activities	62	
Information service activities	63	
Financial service activities except insurance and pension funding	64	
Insurance, reinsurance and pension funding except compulsory social security	65	
Activities auxiliary to financial services and insurance activities	66	
Real estate activities	68	
Legal and accounting activities	69	
Activities of head offices, management consultancy activities	70.	
Architectural and engineering activities, technical testing and analysis	71	
Scientific research and development	72	
Advertising and market research	73	
Other professional, scientific and technical activities	74	
Renting and leasing activities	77.40	Leasing of intellectual property and similar products
Employment activities (part)	78	
Security and investigation activities	80	
Office admin, office support and other business support activities	82	
Public administration and defence; compulsory social security	84.1	Administration of the State and the economic and social policy of the community
	84.3	Compulsory social security activities

Note
SIC 78, Employment Activities, covers workers employed through agencies in all activity sectors. They should be redistributed across the whole economy, both to B-class sectors and other sectors, in proportion to each sector's share of total employment

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4. On a technical note, most economic forecasts show around 20-30 broad activity sectors, a much coarser-grained classification than the SIC sectors in the table above. For example, the table counts as a B-space activity only part of the Construction industry (SIC 43.2, 43.3 and 43.9), whereas forecasts typically show only Construction as a whole (SIC 43). To estimate future employment in sub-sectors such as SIC 43.2, we assume that the share of each sub-sector's employment in its 'parent' sector stays constant.

5. There are two further technical difficulties with the relationship of sectors to land uses. The first is that the line between production space (factories and workshops) and warehousing is blurred. This is not surprising, because manufacturing and warehousing largely occupy the same kinds of buildings, many units combine both functions in proportions that vary over time, and smaller buildings are allowed to shift between the two without planning permission.

6. In setting total land provision targets, therefore, factories, workshops and warehouses, should be merged into a single 'industrial' category. This should not cause any problems, because these uses operate in similar buildings and at similar employment densities, except for very large units including strategic warehousing. In areas where they form a significant part of the stock, these large units should be allowed for separately.

7. The other problem with the tables is that some of the jobs which the table allocates to industrial space are in fact in offices. These jobs are probably in administration, sales and marketing functions of industrial and related businesses. A construction or plumbing business, for example, will often have an office that deals with orders, appointments, record-keeping and the like. In some cases this will be ancillary to an industrial unit and therefore not count as office space, but in other cases it will be free-standing. If the business is small, the office may be its only premises.

8. In total, the Yorkshire and Humber survey found that around one tenth of the jobs which our method allocates to industrial space (factories, workshops and warehouses) are in fact in offices. For a large area such as the region, this is too small a proportion to distort land provision targets. But in some local authority areas, especially the more highly urbanised, it is likely that the distortion is significant. Employment land reviews should aim to correct these distortions, using local knowledge to adjust the relationships shown in the tables above.

9. There are many other, place-specific factors why the sector-to-land-use relationships in the tables above may be invalid. For example, in some places large business units are assigned to the wrong sector or the wrong side of the local authority boundary. In other places, particular sectors are untypical and do not occupy the kinds of space that one would normally expect. In one local authority area in England, for example, there are many jobs classified to Other Supporting Land Transport Activities, SIC 52.21, which normally would occupy warehousing in the local authority area. But in

this case most of the SIC 52.21 jobs relate to railway maintenance and the people concerned work all over the country, mostly outdoors.

10. Where such anomalies arise, close inspection of the numbers, combined with local knowledge, should help correct the statistics and customise the sector-to-land-use assumptions.

11. However, it is inevitable that sector-to-land-use relationships are less reliable for small than larger areas. As the Yorkshire and Humber survey illustrated, the relationships shown in our tables work very well for whole regions. But they are not reliable for individual buildings or employment areas, and may not be reliable at local authority level. This is one of the reasons why demand forecasts are more robust for regions that individual local authority areas.

12. The Yorkshire and Humber report provides further information and advice on sector-to-land-use relationships.

Annex – Sector to land use *[see over]*

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Food, Drink & Tobacco	10110 : Processing and preserving of meat
Manufacturing	Food, Drink & Tobacco	10120 : Processing and preserving of poultry meat
Manufacturing	Food, Drink & Tobacco	10130 : Production of meat and poultry meat products
Manufacturing	Food, Drink & Tobacco	10200 : Processing and preserving of fish, crustaceans and molluscs
Manufacturing	Food, Drink & Tobacco	10310 : Processing and preserving of potatoes
Manufacturing	Food, Drink & Tobacco	10320 : Manufacture of fruit and vegetable juice
Manufacturing	Food, Drink & Tobacco	10390 : Other processing and preserving of fruit and vegetables
Manufacturing	Food, Drink & Tobacco	10410 : Manufacture of oils and fats
Manufacturing	Food, Drink & Tobacco	10420 : Manufacture of margarine and similar edible fats
Manufacturing	Food, Drink & Tobacco	10511 : Liquid milk and cream production
Manufacturing	Food, Drink & Tobacco	10512 : Butter and cheese production
Manufacturing	Food, Drink & Tobacco	10519 : Manufacture of milk products (other than liquid milk and cream,butter, cheese) nec
Manufacturing	Food, Drink & Tobacco	10520 : Manufacture of ice cream
Manufacturing	Food, Drink & Tobacco	10611 : Grain milling
Manufacturing	Food, Drink & Tobacco	10612 : Manufacture of breakfast cereals and cereals-based foods
Manufacturing	Food, Drink & Tobacco	10620 : Manufacture of starches and starch products
Manufacturing	Food, Drink & Tobacco	10710 : Manufacture of bread; manufacture of fresh pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10720 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
Manufacturing	Food, Drink & Tobacco	10730 : Manufacture of macaroni, noodles, couscous and similar farinaceous products
Manufacturing	Food, Drink & Tobacco	10810 : Manufacture of sugar
Manufacturing	Food, Drink & Tobacco	10821 : Manufacture of cocoa, and chocolate confectionery
Manufacturing	Food, Drink & Tobacco	10822 : Manufacture of sugar confectionery
Manufacturing	Food, Drink & Tobacco	10831 : Tea processing
Manufacturing	Food, Drink & Tobacco	10832 : Production of coffee and coffee substitutes
Manufacturing	Food, Drink & Tobacco	10840 : Manufacture of condiments and seasonings
Manufacturing	Food, Drink & Tobacco	10850 : Manufacture of prepared meals and dishes
Manufacturing	Food, Drink & Tobacco	10860 : Manufacture of homogenised food preparations and dietetic food
Manufacturing	Food, Drink & Tobacco	10890 : Manufacture of other food products nec
Manufacturing	Food, Drink & Tobacco	10910 : Manufacture of prepared feeds for farm animals
Manufacturing	Food, Drink & Tobacco	10920 : Manufacture of prepared pet foods
Manufacturing	Food, Drink & Tobacco	11010 : Distilling, rectifying and blending of spirits
Manufacturing	Food, Drink & Tobacco	11020 : Manufacture of wine from grape
Manufacturing	Food, Drink & Tobacco	11030 : Manufacture of cider and other fruit wines
Manufacturing	Food, Drink & Tobacco	11040 : Manufacture of other non-distilled fermented beverages
Manufacturing	Food, Drink & Tobacco	11050 : Manufacture of beer
Manufacturing	Food, Drink & Tobacco	11060 : Manufacture of malt
Manufacturing	Food, Drink & Tobacco	11070 : Manufacture of soft drinks; production of mineral waters and other bottled waters
Manufacturing	Food, Drink & Tobacco	12000 : Manufacture of tobacco products
Manufacturing	Textiles & Clothing	13100 : Preparation and spinning of textile fibres
Manufacturing	Textiles & Clothing	13200 : Weaving of textiles
Manufacturing	Textiles & Clothing	13300 : Finishing of textiles
Manufacturing	Textiles & Clothing	13910 : Manufacture of knitted and crocheted fabrics
Manufacturing	Textiles & Clothing	13921 : Manufacture of soft furnishings
Manufacturing	Textiles & Clothing	13922 : Manufacture of canvas goods, sacks etc
Manufacturing	Textiles & Clothing	13923 : Manufacture of household textiles (other than soft furnishings of 13921)
Manufacturing	Textiles & Clothing	13931 : Manufacture of woven or tufted carpets and rugs
Manufacturing	Textiles & Clothing	13939 : Manufacture of carpets and rugs (other than woven or tufted) nec
Manufacturing	Textiles & Clothing	13940 : Manufacture of cordage, rope, twine and netting
Manufacturing	Textiles & Clothing	13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel
Manufacturing	Textiles & Clothing	13960 : Manufacture of other technical and industrial textiles
Manufacturing	Textiles & Clothing	13990 : Manufacture of other textiles nec
Manufacturing	Textiles & Clothing	14110 : Manufacture of leather clothes
Manufacturing	Textiles & Clothing	14120 : Manufacture of workwear
Manufacturing	Textiles & Clothing	14131 : Manufacture of men's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14132 : Manufacture of women's outerwear, other than leather clothes and workwear
Manufacturing	Textiles & Clothing	14141 : Manufacture of men's underwear
Manufacturing	Textiles & Clothing	14142 : Manufacture of women's underwear
Manufacturing	Textiles & Clothing	14190 : Manufacture of other wearing apparel and accessories
Manufacturing	Textiles & Clothing	14200 : Manufacture of articles of fur
Manufacturing	Textiles & Clothing	14310 : Manufacture of knitted and crocheted hosiery
Manufacturing	Textiles & Clothing	14390 : Manufacture of other knitted and crocheted apparel
Manufacturing	Textiles & Clothing	15110 : Tanning and dressing of leather; dressing and dyeing of fur
Manufacturing	Textiles & Clothing	15120 : Manufacture of luggage, handbags and the like, saddlery and harness
Manufacturing	Textiles & Clothing	15200 : Manufacture of footwear
Manufacturing	Wood & Paper	16100 : Sawmilling and planing of wood
Manufacturing	Wood & Paper	16210 : Manufacture of veneer sheets and wood-based panels
Manufacturing	Wood & Paper	16220 : Manufacture of assembled parquet floors
Manufacturing	Wood & Paper	16230 : Manufacture of other builders' carpentry and joinery
Manufacturing	Wood & Paper	16240 : Manufacture of wooden containers
Manufacturing	Wood & Paper	16290 : Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
Manufacturing	Wood & Paper	17110 : Manufacture of pulp
Manufacturing	Wood & Paper	17120 : Manufacture of paper and paperboard
Manufacturing	Wood & Paper	17211 : Manufacture of corrugated paper and paperboard; manufacture of sacks and bags of paper
Manufacturing	Wood & Paper	17219 : Manufacture of paper and paperboard containers other than sacks and bags
Manufacturing	Wood & Paper	17220 : Manufacture of household and sanitary goods and of toilet requisites
Manufacturing	Wood & Paper	17230 : Manufacture of paper stationery
Manufacturing	Wood & Paper	17240 : Manufacture of wallpaper
Manufacturing	Wood & Paper	17290 : Manufacture of other articles of paper and paperboard
Manufacturing	Printing and Reproduction of Recorded Media	18110 : Printing of newspapers
Manufacturing	Printing and Reproduction of Recorded Media	18121 : Manufacture of printed labels
Manufacturing	Printing and Reproduction of Recorded Media	18129 : Printing (other than printing of newspaper s and printing on labels and tags) nec
Manufacturing	Printing and Reproduction of Recorded Media	18130 : Pre-press and pre-media services
Manufacturing	Printing and Reproduction of Recorded Media	18140 : Binding and related services
Manufacturing	Printing and Reproduction of Recorded Media	18201 : Reproduction of sound recording
Manufacturing	Printing and Reproduction of Recorded Media	18202 : Reproduction of video recording
Manufacturing	Printing and Reproduction of Recorded Media	18203 : Reproduction of computer media
Manufacturing	Fuel Refining	19100 : Manufacture of coke oven products
Manufacturing	Fuel Refining	19201 : Mineral oil refining
Manufacturing	Fuel Refining	19209 : Other treatment of petroleum products (excluding mineral oil refining petrochemicals manufacture)
Manufacturing	Chemicals	20110 : Manufacture of industrial gases
Manufacturing	Chemicals	20120 : Manufacture of dyes and pigments
Manufacturing	Chemicals	20130 : Manufacture of other inorganic basic chemicals
Manufacturing	Chemicals	20140 : Manufacture of other organic basic chemicals
Manufacturing	Chemicals	20150 : Manufacture of fertilisers and nitrogen compounds
Manufacturing	Chemicals	20160 : Manufacture of plastics in primary forms
Manufacturing	Chemicals	20170 : Manufacture of synthetic rubber in primary forms
Manufacturing	Chemicals	20200 : Manufacture of pesticides and other agrochemical products
Manufacturing	Chemicals	20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants
Manufacturing	Chemicals	20302 : Manufacture of printing ink
Manufacturing	Chemicals	20411 : Manufacture of soap and detergents
Manufacturing	Chemicals	20412 : Manufacture of cleaning and polishing preparations
Manufacturing	Chemicals	20420 : Manufacture of perfumes and toilet preparations
Manufacturing	Chemicals	20510 : Manufacture of explosives
Manufacturing	Chemicals	20520 : Manufacture of glues
Manufacturing	Chemicals	20530 : Manufacture of essential oils

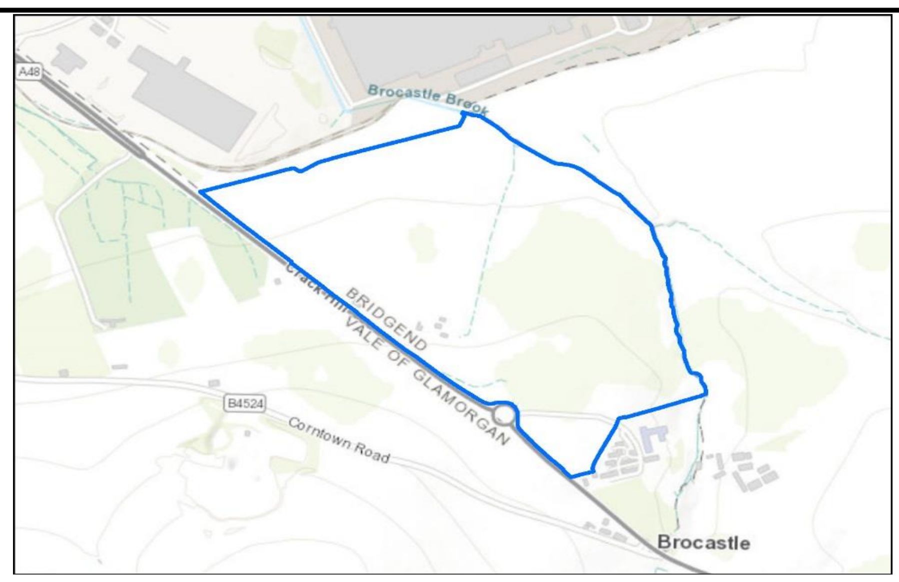
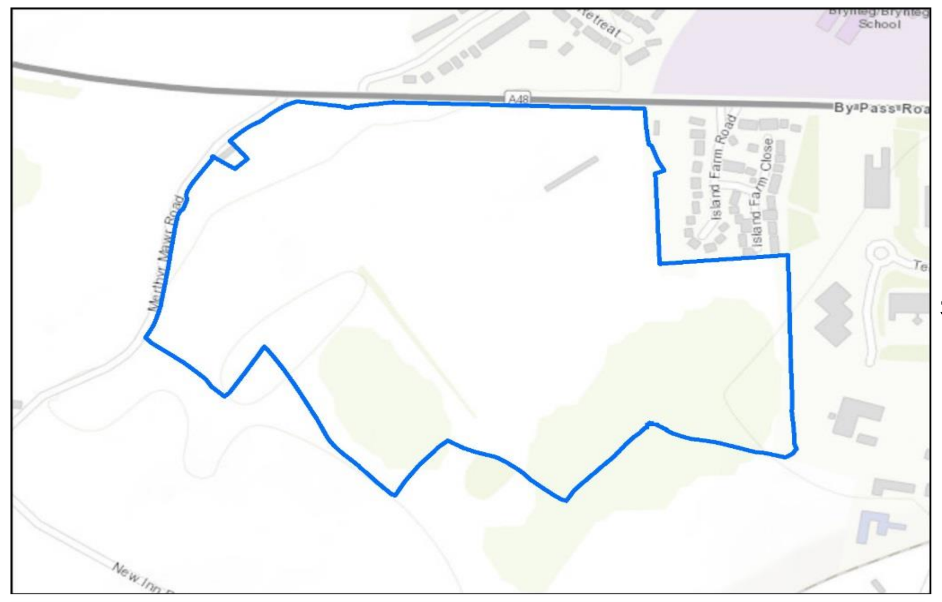
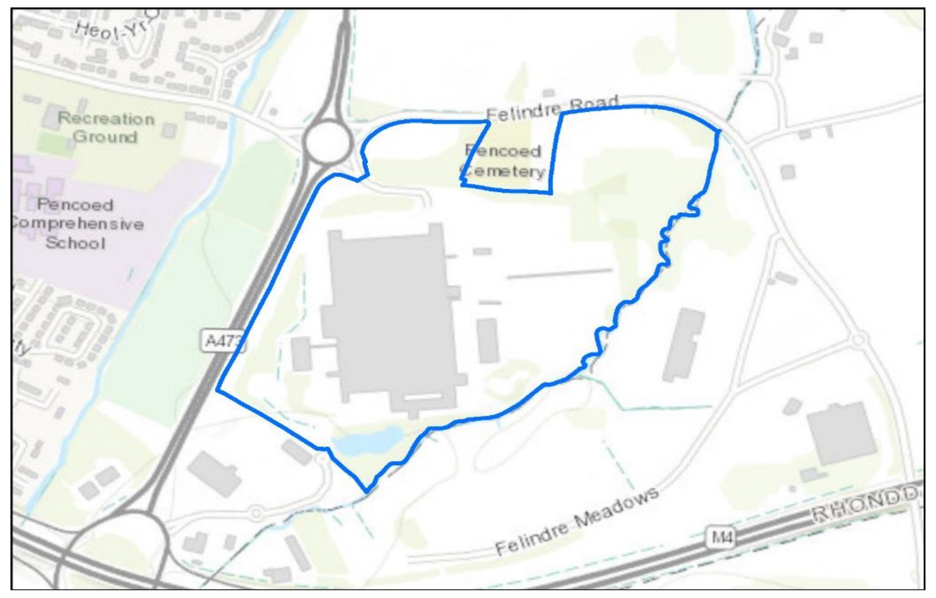
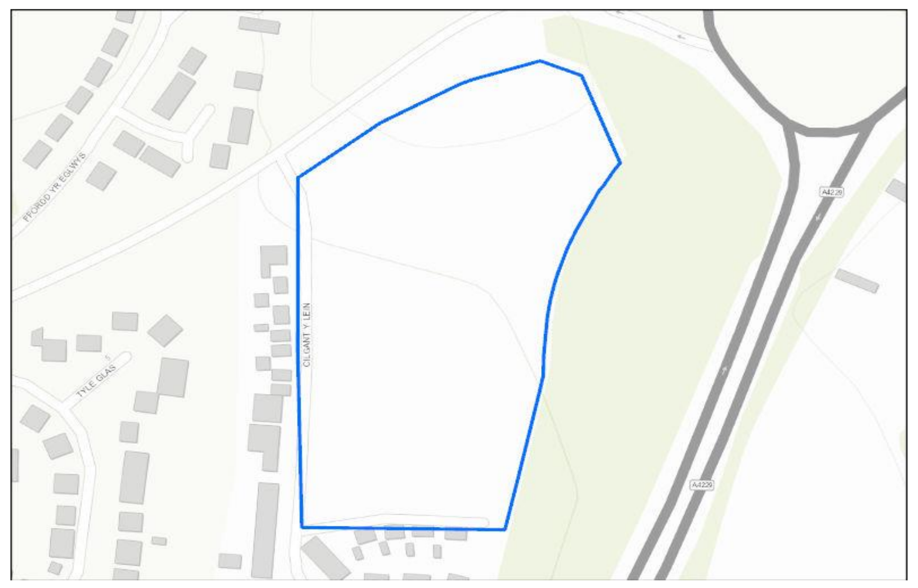
Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Chemicals	20590 : Manufacture of other chemical products nec
Manufacturing	Chemicals	20600 : Manufacture of man-made fibres
Manufacturing	Pharmaceuticals	21100 : Manufacture of basic pharmaceutical products
Manufacturing	Pharmaceuticals	21200 : Manufacture of pharmaceutical preparations
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22110 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22190 : Manufacture of other rubber products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22210 : Manufacture of plastic plates, sheets, tubes and profiles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22220 : Manufacture of plastic packing goods
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22230 : Manufacture of builders� ware of plastic
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	22290 : Manufacture of other plastic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23110 : Manufacture of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23120 : Shaping and processing of flat glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23130 : Manufacture of hollow glass
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23140 : Manufacture of glass fibres
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23190 : Manufacture and processing of other glass, including technical glassware
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23200 : Manufacture of refractory products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23310 : Manufacture of ceramic tiles a nd flags
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23320 : Manufacture of bricks, tiles a nd construction products, in baked clay
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23410 : Manufacture of ceramic household and ornamental articles
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23420 : Manufacture of ceramic sanitary fixtures
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23430 : Manufacture of ceramic insulating fittings
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23440 : Manufacture of other technical ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23490 : Manufacture of other ceramic products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23510 : Manufacture of cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23520 : Manufacture of lime and plaster
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23610 : Manufacture of concrete products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23620 : Manufacture of plaster products for construction purposes
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23630 : Manufacture of ready-mixed concrete
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23640 : Manufacture of mortars
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23650 : Manufacture of fibre cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23690 : Manufacture of other articles of concrete plaster and cement
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23700 : Cutting, shaping and finishing of stone
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23910 : Production of abrasive products
Manufacturing	Rubber, Plastic and Other Non-Metallic Mineral Products	23990 : Manufacture of other non-metallic mineral products
Manufacturing	Metal products	24100 : Manufacture of basic iron and steel and of ferro-alloys
Manufacturing	Metal products	24200 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
Manufacturing	Metal products	24310 : Cold drawing of bars
Manufacturing	Metal products	24320 : Cold rolling of narrow strip
Manufacturing	Metal products	24330 : Cold forming or folding
Manufacturing	Metal products	24340 : Cold drawing of wire
Manufacturing	Metal products	24410 : Precious metals production
Manufacturing	Metal products	24420 : Aluminium production
Manufacturing	Metal products	24430 : Lead, zinc and tin production
Manufacturing	Metal products	24440 : Copper production
Manufacturing	Metal products	24450 : Other non-ferrous metal production
Manufacturing	Metal products	24460 : Processing of nuclear fuel
Manufacturing	Metal products	24510 : Casting of iron
Manufacturing	Metal products	24520 : Casting of steel
Manufacturing	Metal products	24530 : Casting of light metals
Manufacturing	Metal products	24540 : Casting of other non-ferrous metals
Manufacturing	Metal products	25110 : Manufacture of metal structures and parts of structures
Manufacturing	Metal products	25120 : Manufacture of doors and windows of metals
Manufacturing	Metal products	25210 : Manufacture of central heating radiators and boilers
Manufacturing	Metal products	25290 : Manufacture of other tanks, reservoirs and containers of metal
Manufacturing	Metal products	25300 : Manufacture of steam generators, except central heating hot water boilers
Manufacturing	Metal products	25400 : Manufacture of weapons and ammunition
Manufacturing	Metal products	25500 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
Manufacturing	Metal products	25610 : Treatment and coating of metals
Manufacturing	Metal products	25620 : Machining
Manufacturing	Metal products	25710 : Manufacture of cutlery
Manufacturing	Metal products	25720 : Manufacture of locks and hinges
Manufacturing	Metal products	25730 : Manufacture of tools
Manufacturing	Metal products	25910 : Manufacture of steel drums and similar containers
Manufacturing	Metal products	25920 : Manufacture of light metal packaging
Manufacturing	Metal products	25930 : Manufacture of wire products, chain and springs
Manufacturing	Metal products	25940 : Manufacture of fasteners and screw machine products
Manufacturing	Metal products	25990 : Manufacture of other fabricated metal products nec
Manufacturing	Computer & Electronic Products	26110 : Manufacture of electronic components
Manufacturing	Computer & Electronic Products	26120 : Manufacture of loaded electronic boards
Manufacturing	Computer & Electronic Products	26200 : Manufacture of computers and peripheral equipment
Manufacturing	Computer & Electronic Products	26301 : Manufacture of telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic Products	26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment
Manufacturing	Computer & Electronic	26400 : Manufacture of consumer electronics
Manufacturing	Computer & Electronic	26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment navigation, except industrial process control equipment
Manufacturing	Computer & Electronic	26512 : Manufacture of electronic industrial process control equipment
Manufacturing	Computer & Electronic	26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment
Manufacturing	Computer & Electronic Products	26514 : Manufacture of non-electronic industrial process control equipment
Manufacturing	Computer & Electronic Products	26520 : Manufacture of watches and clocks
Manufacturing	Computer & Electronic Products	26600 : Manufacture of irradiation, electromedical and electrottherapeutic equipment
Manufacturing	Computer & Electronic Products	26701 : Manufacture of optical precision instruments
Manufacturing	Computer & Electronic Products	26702 : Manufacture of photographic and cinematographic equipment
Manufacturing	Computer & Electronic Products	26800 : Manufacture of magnetic and optical media
Manufacturing	Computer & Electronic Products	27110 : Manufacture of electric motors, generators and transformers
Manufacturing	Computer & Electronic Products	27120 : Manufacture of electricity distribution and control apparatus
Manufacturing	Computer & Electronic Products	27200 : Manufacture of batteries and accumulators
Manufacturing	Computer & Electronic Products	27310 : Manufacture of fibre optic cables
Manufacturing	Computer & Electronic Products	27320 : Manufacture of other electronic and electric wires and cables
Manufacturing	Computer & Electronic Products	27330 : Manufacture of wiring devices
Manufacturing	Computer & Electronic Products	27400 : Manufacture of electric lighting equipment
Manufacturing	Computer & Electronic Products	27510 : Manufacture of electric domestic appliances
Manufacturing	Computer & Electronic Products	27520 : Manufacture of non-electric domestic appliances
Manufacturing	Computer & Electronic Products	27900 : Manufacture of other electrical equipment
Manufacturing	Machinery & Equipment	28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
Manufacturing	Machinery & Equipment	28120 : Manufacture of fluid power equipment
Manufacturing	Machinery & Equipment	28131 : Manufacture of pumps
Manufacturing	Machinery & Equipment	28132 : Manufacture of compressors
Manufacturing	Machinery & Equipment	28140 : Manufacture of other taps and valves
Manufacturing	Machinery & Equipment	28150 : Manufacture of bearings, gears, gearing and driving elements
Manufacturing	Machinery & Equipment	28210 : Manufacture of ovens, furnaces and furnace burners
Manufacturing	Machinery & Equipment	28220 : Manufacture of lifting and handling equipment
Manufacturing	Machinery & Equipment	28230 : Manufacture of office machinery and equipment (except computers and peripheral equipment)
Manufacturing	Machinery & Equipment	28240 : Manufacture of power-driven hand tools
Manufacturing	Machinery & Equipment	28250 : Manufacture of non-domestic cooling and ventilation equipment

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Manufacturing	Machinery & Equipment	28290 : Manufacture of other general-purpose machinery nec
Manufacturing	Machinery & Equipment	28301 : Manufacture of agricultural tractors
Manufacturing	Machinery & Equipment	28302 : Manufacture of agricultural and forestry machinery (other than a gricultural tractors)
Manufacturing	Machinery & Equipment	28410 : Manufacture of metal forming machinery
Manufacturing	Machinery & Equipment	28490 : Manufacture of other machine tools
Manufacturing	Machinery & Equipment	28910 : Manufacture of machinery for metallurgy
Manufacturing	Machinery & Equipment	28921 : Manufacture of machinery for mining
Manufacturing	Machinery & Equipment	28922 : Manufacture of earthmoving equipment
Manufacturing	Machinery & Equipment	28923 : Manufacture of equipment for concrete crushing and screening roadworks
Manufacturing	Machinery & Equipment	28930 : Manufacture of machinery for food, beverage and tobacco processing
Manufacturing	Machinery & Equipment	28940 : Manufacture of machinery for textile, apparel and leather production
Manufacturing	Machinery & Equipment	28950 : Manufacture of machinery for paper and paperboard production
Manufacturing	Machinery & Equipment	28960 : Manufacture of plastics and rubber machinery
Manufacturing	Machinery & Equipment	28990 : Manufacture of other special-purpose machinery nec
Manufacturing	Machinery & Equipment	29100 : Manufacture of motor vehicles
Manufacturing	Machinery & Equipment	29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
Manufacturing	Machinery & Equipment	29202 : Manufacture of trailers and semi-trailers
Manufacturing	Machinery & Equipment	29203 : Manufacture of caravans
Manufacturing	Machinery & Equipment	29310 : Manufacture of electrical and electronic equipment for motor vehicles
Manufacturing	Machinery & Equipment	29320 : Manufacture of other parts and accessories for motor vehicles
Manufacturing	Machinery & Equipment	30110 : Building of ships and floating structures
Manufacturing	Machinery & Equipment	30120 : Building of pleasure and sporting boats
Manufacturing	Machinery & Equipment	30200 : Manufacture of railway locomotives and rolling stock
Manufacturing	Machinery & Equipment	30300 : Manufacture of air and spacecraft and related machinery
Manufacturing	Machinery & Equipment	30400 : Manufacture of military fighting vehicles
Manufacturing	Machinery & Equipment	30910 : Manufacture of motorcycles
Manufacturing	Machinery & Equipment	30920 : Manufacture of bicycles and invalid carriages
Manufacturing	Machinery & Equipment	30990 : Manufacture of other transport equipment nec
Manufacturing	Other Manufacturing	31010 : Manufacture of office and shop furniture
Manufacturing	Other Manufacturing	31020 : Manufacture of kitchen furniture
Manufacturing	Other Manufacturing	31030 : Manufacture of mattresses
Manufacturing	Other Manufacturing	31090 : Manufacture of other furniture
Manufacturing	Other Manufacturing	32110 : Striking of coins
Manufacturing	Other Manufacturing	32120 : Manufacture of jewellery and related articles
Manufacturing	Other Manufacturing	32130 : Manufacture of imitation jewellery and related articles
Manufacturing	Other Manufacturing	32200 : Manufacture of musical instruments
Manufacturing	Other Manufacturing	32300 : Manufacture of sports goods
Manufacturing	Other Manufacturing	32401 : Manufacture of professional and arcade games and toys
Manufacturing	Other Manufacturing	32409 : Manufacture of games and toys (other than professional and arcade games and toys)
Manufacturing	Other Manufacturing	32500 : Manufacture of medical and dental instruments and supplies
Manufacturing	Other Manufacturing	32910 : Manufacture of brooms and brushes
Manufacturing	Other Manufacturing	32990 : Other manufacturing nec
Manufacturing	Other Manufacturing	33110 : Repair of fabricated metal products
Manufacturing	Other Manufacturing	33120 : Repair of machinery
Manufacturing	Other Manufacturing	33130 : Repair of electronic and optical equipment
Manufacturing	Other Manufacturing	33140 : Repair of electrical equipment
Manufacturing	Other Manufacturing	33150 : Repair and maintenance of ships and boats
Manufacturing	Other Manufacturing	33160 : Repair and maintenance of aircraft and spacecraft
Manufacturing	Other Manufacturing	33170 : Repair and maintenance of other transport equipment
Manufacturing	Other Manufacturing	33190 : Repair of other equipment
Manufacturing	Other Manufacturing	33200 : Installation of industrial machinery and equipment
Other industrial	Utilities	37000 : Sewerage
Other industrial	Utilities	38110 : Collection of non-hazardous waste
Other industrial	Utilities	38120 : Collection of hazardous waste
Other industrial	Utilities	38210 : Treatment and disposal of non-hazardous waste
Other industrial	Utilities	38220 : Treatment and disposal of hazardous waste
Other industrial	Utilities	38310 : Dismantling of wrecks
Other industrial	Utilities	38320 : Recovery of sorted materials
Other industrial	Specialised Construction Activities	43210 : Electrical installation
Other industrial	Specialised Construction Activities	43220 : Plumbing, heat and air-conditioning installation
Other industrial	Specialised Construction Activities	43290 : Other construction installation
Other industrial	Specialised Construction Activities	43310 : Plastering
Other industrial	Specialised Construction Activities	43320 : Joinery installation
Other industrial	Specialised Construction Activities	43330 : Floor and wall covering
Other industrial	Specialised Construction Activities	43341 : Painting
Other industrial	Specialised Construction Activities	43342 : Glazing
Other industrial	Specialised Construction Activities	43390 : Other building completion and finishing
Other industrial	Specialised Construction Activities	43910 : Roofing activities
Other industrial	Specialised Construction Activities	43991 : Scaffold erection
Other industrial	Specialised Construction Activities	43999 : Specialised construction activities (other than scaffold erection)
Other industrial	Wholesale	45200 : Maintenance and repair of motor vehicles
Other industrial	Wholesale	45400 : Sale, maintenance and repair of motorcycles and related parts and accessories
Warehousing	Wholesale	46110 : Agents involved in the sale of agricultural raw materials, live animals, texti and semi-finished goods
Warehousing	Wholesale	46120 : Agentsinvolved in the sale of fuels, ores, metals and industrial chemicals
Warehousing	Wholesale	46130 : Agentsinvolved in the sale of timber and building materials
Warehousing	Wholesale	46140 : Agentsinvolved in the sale of machinery, industrial equipment, ships and aircraft
Warehousing	Wholesale	46150 : Agentsinvolved in the sale of furniture, household goods, hardware and ironmongery
Warehousing	Wholesale	46160 : Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
Warehousing	Wholesale	46170 : Agents involved in the sale of food, beverages and tobacco
Warehousing	Wholesale	46180 : Agents specialised in the sale of other particular products
Warehousing	Wholesale	46190 : Agents involved in the sale of a variety of goods
Warehousing	Wholesale	46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
Warehousing	Wholesale	46220 : Wholesale of flowers and plants
Warehousing	Wholesale	46230 : Wholesale of live animals
Warehousing	Wholesale	46240 : Wholesale of hides, skins and leather
Warehousing	Wholesale	46310 : Wholesale of fruit and vegetables
Warehousing	Wholesale	46320 : Wholesale of meat and meat products
Warehousing	Wholesale	46330 : Wholesale of dairy products, eggs and edible oils and fats
Warehousing	Wholesale	46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks
Warehousing	Wholesale	46342 : Wholesale of wine, beer, spirits and other alcoholic beverages
Warehousing	Wholesale	46350 : Wholesale of tobacco products
Warehousing	Wholesale	46360 : Wholesale of sugar and chocolate and sugar confectionery
Warehousing	Wholesale	46370 : Wholesale of coffee, tea, cocoa and spices
Warehousing	Wholesale	46380 : Wholesale of other food, including fish, crustaceans and molluscs
Warehousing	Wholesale	46390 : Non-specialised wholesale of food, beverages and tobacco
Warehousing	Wholesale	46410 : Wholesale of textiles
Warehousing	Wholesale	46420 : Wholesale of clothing and footwear
Warehousing	Wholesale	46431 : Wholesale of gramophone records, audio tapes, compact discs and video tapes and of the equipment on which these are played)
Warehousing	Wholesale	46439 : Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes,compact discs and video tapes and the equipment on which these are played)
Warehousing	Wholesale	46440 : Wholesale of china and glassware and cleaning materials
Warehousing	Wholesale	46450 : Wholesale of perfume and cosmetics
Warehousing	Wholesale	46460 : Wholesale of pharmaceutical goods
Warehousing	Wholesale	46470 : Wholesale of furniture, carpets and lighting equipment
Warehousing	Wholesale	46480 : Wholesale of watches and jewellery
Warehousing	Wholesale	46491 : Wholesale of musical instruments

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Warehousing	Wholesale	46499 : Wholesale of household goods (other than musical instruments) nec
Warehousing	Wholesale	46510 : Wholesale of computers, computer peripheral equipment and software
Warehousing	Wholesale	46520 : Wholesale of electronic and telecommunications equipment and parts
Warehousing	Wholesale	46610 : Wholesale of agricultural machinery, equipment and supplies
Warehousing	Wholesale	46620 : Wholesale of machine tools
Warehousing	Wholesale	46630 : Wholesale of mining, construction and civil engineering machinery
Warehousing	Wholesale	46640 : Wholesale of machinery for the textile industry and of sewing and knitting machines
Warehousing	Wholesale	46650 : Wholesale of office furniture
Warehousing	Wholesale	46660 : Wholesale of other office machinery and equipment
Warehousing	Wholesale	46690 : Wholesale of other machinery and equipment
Warehousing	Wholesale	46711 : Wholes ale of petroleum and petroleum products
Warehousing	Wholesale	46719 : Wholes ale of fuels and related products (other than petroleum and petroleum products)
Warehousing	Wholesale	46720 : Wholesale of metals and metal ores
Warehousing	Wholesale	46730 : Wholesale of wood, construction materials and sanitary equipment
Warehousing	Wholesale	46740 : Wholesale of hardware, plumbing and heating equipment and supplies
Warehousing	Wholesale	46750 : Wholesale of chemical products
Warehousing	Wholesale	46760 : Wholesale of other intermediate products
Warehousing	Wholesale	46770 : Wholesale of waste and scrap
Warehousing	Wholesale	46900 : Non-specialised wholesale trade
Warehousing	Land Transport, Storage & Post	49410 : Freight transport by road
Warehousing	Land Transport, Storage & Post	49420 : Removal services
Warehousing	Land Transport, Storage & Post	52101 : Operation of warehousing and storage facilities for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52102 : Operation of warehousing and storage facilities for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52103 : Operation of warehousing and storage facilities for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	52211 : Operation of rail freight terminals
Warehousing	Land Transport, Storage & Post	52212 : Operation of rail passenger facilities at railway stations
Warehousing	Land Transport, Storage & Post	52213 : Operation of bus and coach passenger facilities at bus and coach stations
Warehousing	Land Transport, Storage & Post	52219 : Other service activities incidental to land transportation, nec (not including operation of rail freight terminals, passenger facilities at railway ies at railway stations or passenger facilities at bus and coachstations or passenger facilities at railway stations or passenger facilities at bus and coach stations)
Warehousing	Land Transport, Storage & Post	52241 : Cargo handling for water transport activities of division 50
Warehousing	Land Transport, Storage & Post	52242 : Cargo handling for air transport activities of division 51
Warehousing	Land Transport, Storage & Post	52243 : Cargo handling for land transport activities of division 49
Warehousing	Land Transport, Storage & Post	53100 : Postal activities under universal service obligation
Warehousing	Land Transport, Storage & Post	53201 : Licensed Carriers
Warehousing	Land Transport, Storage & Post	53202 : Unlicensed Carriers
Office	Media Activities	58110 : Book publishing
Office	Media Activities	58120 : Publishing of directories and mailing lists
Office	Media Activities	58130 : Publishing of newspapers
Office	Media Activities	58141 : Publishing of learned journals
Office	Media Activities	58142 : Publishing of consumer, business and professional journals and periodicals
Office	Media Activities	58190 : Other publishing activities
Office	Media Activities	59111 : Motion picture production activities
Office	Media Activities	59112 : Video production activities
Office	Media Activities	59113 : Television programme production activities
Office	Media Activities	59120 : Motion picture, video and television programme post-production activities
Office	Media Activities	59131 : Motion picture distribution activities
Office	Media Activities	59132 : Video distribution activities
Office	Media Activities	59133 : Television programme distribution activities
Office	Media Activities	59200 : Sound recording and music publishing activities
Office	Media Activities	60100 : Radio broadcasting
Office	Media Activities	60200 : Television programming and broadcasting activities
Office	Computing & Information Services	62011 : Ready-made interactive leisure and entertainment software development
Office	Computing & Information Services	62012 : Business and domestic software development
Office	Computing & Information Services	62020 : Computer consultancy activities
Office	Computing & Information Services	62030 : Computer facilities management activities
Office	Computing & Information Services	62090 : Other information technology and computer service activities
Office	Computing & Information Services	63110 : Data processing, hosting and related activities
Office	Computing & Information Services	63120 : Web portals
Office	Computing & Information Services	63910 : News agency activities
Office	Computing & Information Services	63990 : Other information service activities nec
Office	Finance	64110 : Central banking
Office	Finance	64191 : Banks
Office	Finance	64192 : Building societies
Office	Finance	64201 : Activities of agricultural holding companies
Office	Finance	64202 : Activities of production holding companies
Office	Finance	64203 : Activities of construction holding companies
Office	Finance	64204 : Activities of distribution holding companies
Office	Finance	64205 : Activities of financial services holding companies
Office	Finance	64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c
Office	Finance	64301 : Activities of investment trusts
Office	Finance	64302 : Activities of unit trusts
Office	Finance	64303 : Activities of venture and development capital companies
Office	Finance	64304 : Activities of open-ended investment companies
Office	Finance	64305 : Activities of property unit trusts
Office	Finance	64306 : Activities of real estate investment trusts
Office	Finance	64910 : Financial leasing
Office	Finance	64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
Office	Finance	64922 : Activities of mortgage finance companies
Office	Finance	64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.
Office	Finance	64991 : Security dealing on own account
Office	Finance	64992 : Factoring
Office	Finance	64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
Office	Insurance & Pensions	65110 : Life insurance
Office	Insurance & Pensions	65120 : Non-life insurance
Office	Insurance & Pensions	65201 : Life reinsurance
Office	Insurance & Pensions	65202 : Non-life reinsurance
Office	Insurance & Pensions	65300 : Pension funding
Office	Finance	66110 : Administration of financial markets
Office	Finance	66120 : Security and commodity contracts brokerage
Office	Finance	66190 : Other activities auxiliary to financial services, except insurance and pension funding
Office	Finance	66210 : Risk and damage evaluation
Office	Finance	66220 : Activities ofinsurance agents and brokers
Office	Finance	66290 : Other activities auxiliary to insurance and pension funding
Office	Finance	66300 : Fund management activities
Office	Real Estate	68100 : Buying and selling of own real estate
Office	Real Estate	68201 : Renting and operating of Housing Association real estate
Office	Real Estate	68202 : Letting and operating of conference and exhibition centres
Office	Real Estate	68209 : Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.
Office	Real Estate	68310 : Real estate agencies

Employment land use	Sector (Experian)	Industry (5 digit SIC)
Office	Real Estate	68320 : Management of real estate on a fee or contract basis
Office	Professional services	69101 : Barristers at law
Office	Professional services	69102 : Solicitors
Office	Professional services	69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec
Office	Professional services	69201 : Accounting, and auditing activities
Office	Professional services	69202 : Bookkeeping activities
Office	Professional services	69203 : Tax consultancy
Office	Professional services	70100 : Activities of head offices
Office	Professional services	70210 : Public relations and communication activities
Office	Professional services	70221 : Financial management
Office	Professional services	70229 : Management consultancy activities (other than financial management)
Office	Professional services	71111 : Architectural activities
Office	Professional services	71112 : Urban planning and landscape architectural activities
Office	Professional services	71121 : Engineering design activities for industrial process and production
Office	Professional services	71122 : Engineering related scientific and technical consulting activities
Office	Professional services	71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
Office	Professional services	71200 : Technical testing and analysis
Office	Professional services	72110 : Research and experimental development on biotechnology
Office	Professional services	72190 : Other research and experimental development on natural sciences and engineering
Office	Professional services	72200 : Research and experimental development on social sciences and humanities
Office	Professional services	73110 : Advertising agencies
Office	Professional services	73120 : Media representation
Office	Professional services	73200 : Market research and public opinion polling
Office	Professional services	74300 : Translation and interpretation activities
Office	Professional services	74901 : Environmental consulting activities
Office	Professional services	74902 : Quantity surveying activities
Office	Professional services	74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)
Office	Administrative & Supportive Service Activities	77400 : Leasing of intellectual property and similar products, except copyrighted works
Office	Administrative & Supportive Service Activities	78101 : Motion picture, television and other theatrical casting
Office	Administrative & Supportive Service Activities	78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec
Office	Administrative & Supportive Service Activities	78200 : Temporary employment agency activities
Office	Administrative & Supportive Service Activities	78300 : Other human resources provision
Office	Administrative & Supportive Service Activities	80100 : Private security activities
Office	Administrative & Supportive Service Activities	80200 : Security systems service activities
Office	Administrative & Supportive Service Activities	80300 : Investigation activities
Office	Administrative & Supportive Service Activities	82110 : Combined office administrative service activities
Office	Administrative & Supportive Service Activities	82190 : Photocopying, document preparation and other specialised office support activities
Office	Administrative & Supportive Service Activities	82200 : Activities of call centres
Office	Administrative & Supportive Service Activities	82301 : Activities of exhibition and fair organizers
Office	Administrative & Supportive Service Activities	82302 : Activities of conference organizers
Office	Administrative & Supportive Service Activities	82911 : Activities of collection agencies
Office	Administrative & Supportive Service Activities	82912 : Activities of credit bureaus
Warehousing	Administrative & Supportive Service Activities	82920 : Packaging activities
Office	Administrative & Supportive Service Activities	82990 : Other business support service activities nec
Office	Public Administration & Defence	84110 : General public administration activities
Office	Public Administration & Defence	84120 : Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
Office	Public Administration & Defence	84130 : Regulation of and contribution to more efficient operation of businesses
Office	Public Administration & Defence	84210 : Foreign affairs
Office	Public Administration & Defence	84300 : Compulsory social security activities
Office	Other Private Services	94110 : Activities of business and employers membership organisations
Office	Other Private Services	94120 : Activities of professional membership organisations
Office	Other Private Services	94200 : Activities of trade unions
Office	Other Private Services	94910 : Activities of religious organisations
Office	Other Private Services	94920 : Activities of political organisations
Office	Other Private Services	94990 : Activities of other membership organisations nec
Other industrial	Other Private Services	95110 : Repair of computers and peripheral equipment
Other industrial	Other Private Services	95120 : Repair of communication equipment
Other industrial	Other Private Services	95210 : Repair of consumer electronics
Other industrial	Other Private Services	95220 : Repair of household appliances and home and garden equipment
Other industrial	Other Private Services	95230 : Repair of footwear and leather goods
Other industrial	Other Private Services	95240 : Repair of furniture and home furnishings
Other industrial	Other Private Services	95250 : Repair of watches, clocks and jewellery
Other industrial	Other Private Services	95290 : Repair of other personal and household goods

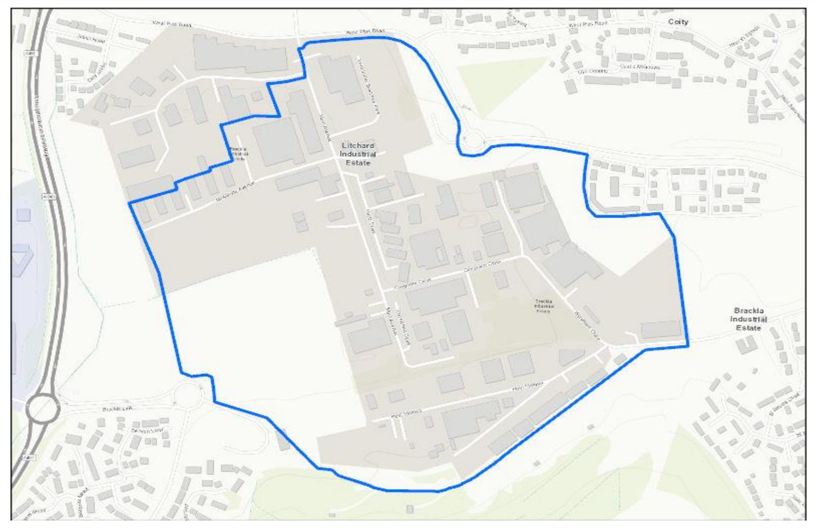
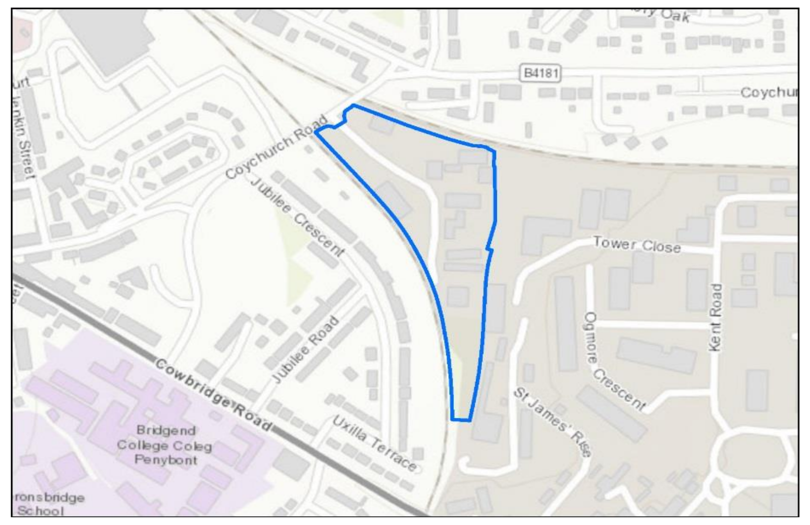
Bridgend County Borough - Strategic employment sites

			AREA			1. Market Attractiveness Factors						2. Sustainable Development Factors		
						1.1	1.2	1.3	1.4	1.5	1.6	2.1	2.2	2.3
Site name	**Location map**	**LDP Policy Number**	**Total land (ha)**	**Potential employment land (ha)**	**Carry forward vacant emplt land (ha)**	**Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications /building regulations applications.**	**Is the site being actively marketed as an employment site?**	**Has there been any recent market activity? (This could include enquiries, sales or lettings)**	**Is the site owned by a developer or another agency known to undertake employment development?**	**Is development for employment viable, with any public funding if it is committed?**	**Is the site immediately available?**	**Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?**	**Sustainability Appraisal Commentary**	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**
Brocastle Waterton		SP9(1)	46.2	20.4	20.4	N	Y		Y	N	Y	Y	The site is located outwith 2km of the Strategic Road Network and bounded by Brocastle Brook. No other major environmental or amenity constraints.	
Island Farm, Bridgend		SP9(2)	26.0	11.0		N	N		Y	N	Y	Y - with mitigation	The site includes a listed building, resulting in potential setting impacts from development. Additionally, the site is located outwith 2km of the Strategic Road Network but within 500m of an identified traffic congestion point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts.	Transport Assessment, Air Quality Assessment, Heritage Assessment
Pencoed Technology Park		SP9(3)	30.6	5.36	5.36	N	N		Y	N	Y	Y - with mitigation	The site is bounded to the south east by Ewenni Fach, giving rise to potential water quality impacts from development. No other major environmental or amenity constraints.	Transport Assessment, Air Quality Assessment, Heritage Assessment
Ty Draw Farm, Pyle		SP9(4) & PLA3(20)	6.1	2.23	2.23	N	Y		Y	N	Y	Y - with mitigation	The site is located within 500m of a traffic congestion point (as identified by BCBC Highways) and within 500m of a Main River. No other major environmental or amenity constraints.	Transport Assessment, Air Quality Assessment

Bridgend County Borough - Strategic employment sites

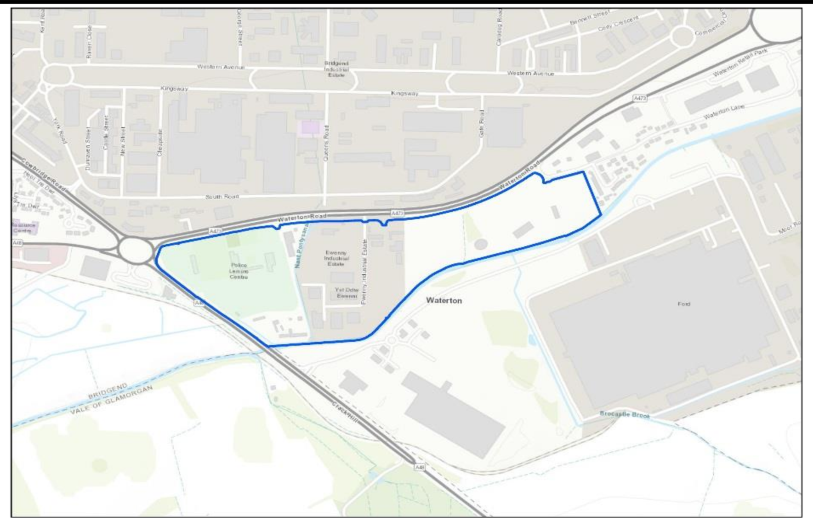
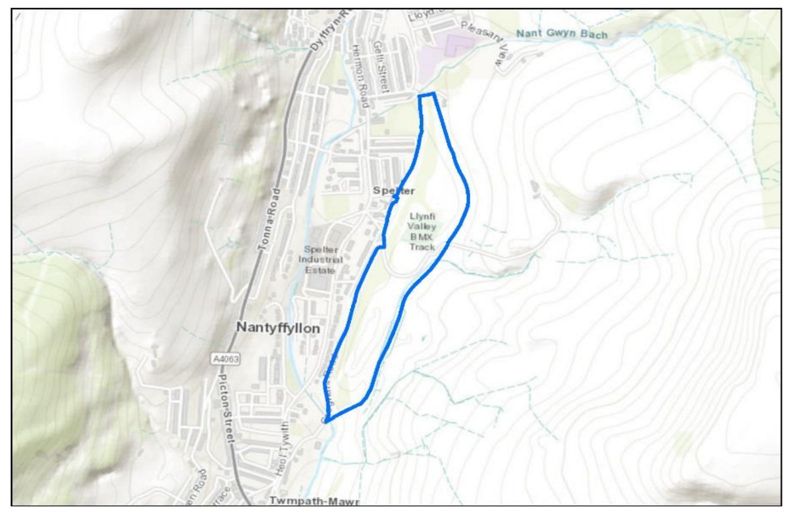
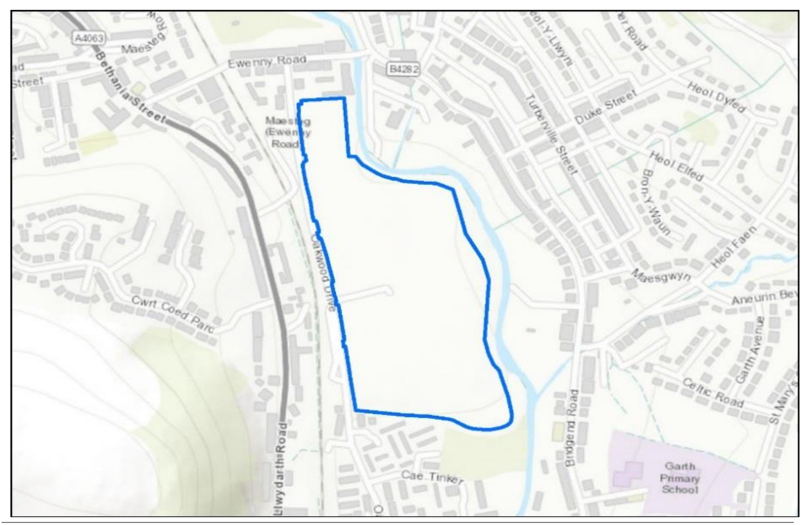
3. Strategic Planning Factors 3.1 **Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	3.2 **Is the site identified or likely to be required for a specific user or specialist use?**	3.3 **Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	3.4 **Is the site important in delivering other economic development objectives or the spatial strategy?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation:**
Y	N	Y	Y	This site, owned by the Welsh Assembly Government, is located on the A48, approximately 4 kms from M4 J35. Immediately to the north is the Cowbridge Ford Motors works. (which is served by a rail head) and the extensive south Bridgend industrial area. The site is almost entirely undeveloped greenfield. To the south abutting the site is a recent care home development. The options for future development are limited by topographical constraints, and substantial re-profiling is required to create a development plateaux. The potential for development was set out in the 2011 Brocastle masterplan. Planning permission was forthcoming in 2016 for a business park in accordance with the masterplan that will provide 71,441 sq m of open B class use. RM for the discharge of conditions are currently being progressed. The available site area (20.4 ha) is calculated on the basis of the floorspace in the planning permission, and applying a floorspace density of 35%.	This site will be attractive to industrial occupiers, due to its proximity to established industrial areas and road access to the motorway. However, viability remains a challenge and will require public sector intervention to bring forward.	This site has topographical issues, but around 20 ha is suitable and available for employment use.	Retain
N	N	N	Y	A large greenfield site immediately west of the Bridgend Science Park immediately south of the A48 (but with no direct access on to the A48), and 8 kms from both M4 J35 and J37. Part of the site comprises the former P.O.W Camp, and Hut 9 is listed. Planning permission was granted in 2012 for a new national sports stadium, training facilities together with other leisure, commercial and a 21,000 sq m office extension to the Science Park. Enabling infrastructure works have commenced to delive the first element of the scheme, a tennis academy. Commercial elements may follow.	The existing Science Park satisfies demand for the area, land unlikely to be developed due to generally weak occupier demand and lack of viability.	Employment uses are not viable in this location over the longer term, and there is no real prospect of the office element of the permission coming forward, or employment uses in a future different development mix.	Release
N	N	Y	Y	TheTechnology Park is owned by the Welsh Assembly Government and occupied by the Sony camera manufacturing and technical support service. The site lies just to the north of the newest aditions to the Pencoed Technology Park and M4 J36. 5 ha in two parcels to the north of the Sony site remain available for development. Further land potentially suitable for expansion of the technology park lies to the south and east within the neighbouring Rhondda Cynon Taff.	Site will be attractive to industrial occupiers, due to its proximity to junction 35 M4. However, viability remains a challenge. The existing building (Pencoed Technology Park) requires subdivision to attract occupiers as configuration is not attractive to single occupier.	This motorway junction location is popular with R&D and office occupiers, with the technology park immediately south and Bocam immediately to the south of the motorway junction. It is attractive location to occupiers and developers.	Retain
N	N	N	Y	Located west of the A4229 within the north west quadrant of M4 J 37, and approximately 1 km to the north is Pyle across the junction with the A48. The site is bounded to the west by residential development and is well screened by a dense tree belt from the A4229. The large Village Farm IE is nearby on the northern side of the A48 junction, but this site is remote and not interconnected with other industrial areas. The PLA3(20) allocated the site for employment plus residential, with the latter acknowledged to be needed to enable the former with no need for public fuinding other than possibly S106. PLA3(20) draws attention to this site being the only opportunity in the locality to provide B1 employment, and that the site could potentially deliver 600 jobs. Planning permission for employment in the north and residential in the south was granted in 2014, and the housing elelment has now been delivered . Other than some marketing activity there has been no progress on the employment element.	Site location close to junction 37 M4, makes it attractive to industrial occupiers, but proximity to residential will deter some occupiers. Furthermore, viability is a challenge to bring the site forward.	Whilst there is a large employment area close by, which has scope for regeneration and intensification of activity, this site will be attractive for employment occupiers and developers because of its motorway access.	Retain

Bridgend County Borough - Employment sites assessment

			AREA			1. Market Attractiveness Factors							2. Sustainable Development Factors	
						1.1	1.2	1.3	1.4	1.5	1.6	1.7	2.1	2.2
Site name	**Location map**	**LDP Policy Number**	**Total area (ha)**	**Vacant land (ha)**	**Carry forward vacant emplt land (ha)**	**Has the site been formally identified for employment for at least 10 years?**	**Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.**	**Is the site being actively marketed as an employment site?**	**Is the site owned by a developer or another agency known to undertake employment development?**	**Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?**	**Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?**	**Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?**	**Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?**	**Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?**
Brackla Industrial Estate		REG1(1) & PLA3(2)	42.80	7.70	7.70	Y	N	Y	N	Y	Y	N	Y	N
Bridgend Industrial Estate		REG1(2)	128.19	9.16	9.16	Y	N	Y	N	Y	Y	N	Y	Y - subject to mitigation
Coity Sidings, Bridgend		REG1(3)	0.60	-	-		N	N	N	N	N	N	Y	N
Coychurch Yard, Bridgend		REG1(4)	2.74	0.13	0.13	Y	N	N				N	Y	Y
Litchard Industrial Estate		REG1(5) & PLA3(2)	5.97	-	-	Y	N	Y	N	Y	Y	N	Y - subject to mitigation	Y

2.3	2.4	3. Strategic Planning Factors 3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
The site includes Ancient Woodland and TPO, Important Trees or Hedgerows. Also within 500m of a Main River.	Arboricultural / Ecological Assessment.	Y	N	Y	Y	Y	Large established industrial estate, accommodating a number of moderate to large sized industrial units just 1 km south of J36 M4. The key operator is Talis Group who manufacture equiptment or the water industry. The Estate is home to a number of metal manufactring firms. Many buildings are of low specification and there is little landscaping. Adjoins Litchards IE. The PLA3(2) regeneration area included land to the east and west that have been / are being developed for housing. The remaining land allocated for employment use is the rectangular area west of the Estate and south of Litchards. The policy acknowledged that the employment element could need JESSICA and/or S106 funding to enable implementation.	Brackla Industrial Estate is a well established industrial location. Some of the industrial units have been lost to alternative uses such as leisure (e.g. gyms). In addition some of the estates has been lost to residential. The combination of alternative occupiers and redevelopment has ebbed away some of the integrity of the estate. The estate provides a range of size, size and quality of units therefore they remain in demand.	This estate has excellent access to the M4, and the land which is available for employment is of regular shape, unconstrained and in public ownership. A good location to accommodate employment floorspace need.	Retain	Retain
The site includes the Royal Ordnance Factory Bridgend Dual-storey Pillbox Scheduled Monument. Also within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. No other major environmental or amenity constraints.	Heritage Assessment, Transport Assessment, Air Quality Assessment	Y	N	N	N	Y	One of Bridgend's largest and longest established industrial estates, accessed via the A473 just 3 miles from J35 M4. The site has been extensively and successfully developed for a variety of businesses, ranging from small local firms to large multi-nationals. Key occupiers include Astra who manufacture computer games, Day's Medical Aids who manufacture medical aids, JW Morris electrical and mechanical contractors, Spectrum Technologies that manufacture aerospace equiptment and Steinhoff furniture manufacturers. The available land is distributed on a number of plots acri=oss the estate.	Bridgend Industrial Estate is the borough's largest industrial area, long established with a range of size and type of units. Despite some of the units being dated, given that no significant new build has occurred in the borough, the estate remains popular. There is evidence of occupiers taking multiple units on the estate.	The estate has a number of relatively small parcels of available land, that are likely to be taken up over the Plan period.	Retain	Retain
Site is within 550m of a Main River. No other major environmental or amneity constraints.		Y	N	Y	N	N	The site is close to Bridgend town centre and occupied by a builders merchants. Land immediately to the north (the Sidings) that was within the designated employment area has been redeveloped for housing. There is no available developable employment land.	Site remains attractive to existing builder merchant. We are not aware that they wish to vacate their site. The site should remain for employment use but should the existing occupier vacate then the site should be reassessed for its suitability at that point in the property cycle.	The employment site has been reduced by redevelopment for residential , and the employment area has been shrunk to include only the builders merchants.	Retain	
Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. No other major environmental or amenity constraints.	Transport Assessment, Air Quality Assessment	Y	N	N	N	N	Employment area adjoining Bridgend IE., and close to Bridgend town centre. Only very minor area possibly available for future employment use.	Small industrial estate that provides a mix and range of small units. The estate is well occupied and attracts a range of occupiers. The units are of good quality and are likely to be attractive to occupiers over the plan period.	A popular industrial estate providingr a range of accommodation sizes. But only very minor floorspace expansion opportunity.	Retain	Retain
The site includes Ancient Woodland and TPO, Important Trees or Hedgerows. Also within 500m of a Main River.	Arboricultural / Ecological Assessment.	Y					Highly accessible industrial estate, just 1 km south of J36 M4 adjoining the Brackla IE. The PLA3(2) area to the west of the Estate has been redeveloped for housing. No land for floorspace expansion within the IE, but available employment land to the south, within Brackla IE.	Litchard Industrial Estate is part of the wider Brackla Industrial Estate. There is evidence of refurbishment occurring on the estate and units are generally well occupied. The units are likely to remain in demand given its proximity to other uses and range and size of units provided.	A popular estate where some stock has been recycled. Benefits from proximity to M4 and adjoining Brackla IE. No land for floorspace expansion.	Retain	

Bridgend County Borough - Employment sites assessment

Site name	Location map	LDP Policy Number	AREA Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Parc Afon Ewenni		REG1(6) & PLA3(4)	27.00	2.00	2.00	Y	N	N				N	Y	N
Penybont Industrial Estate, Bridgend		REG1(7)	0.65	-	-	Y	N	N				N	Y	Y
Waterton Industrial Estate		REG1(8)	127.24	9.98	9.98	Y	Y	Y	N	Y	Y	N	Y - with mitigation	N
Coegnant, Maesteg		REG1(9) & PLA3(6)	15.31	2.00		Y	N	N	N	N	N	N	Y	Y
Ewenny Road, Maesteg		REG1(10) & PLA3(7)	7.71	3.50	3.50	Y	N	N	Y	N	N	N	Y - with justification (flood risk) and mitigation	N

2.3	2.4	3. Strategic Planning Factors 3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
No major environmental or amneity constraints, although the site is within 500m of a Main River.							This IE is part of the extensive south Bridgend industrial area, with the Brisdgend IE immediately north and Waterton IE immediately south. The PLA3(4) policy acknowledges that there is under-utilised industrial land and the site is isolated, and proposes residential and community facilities to deliver a more sustainable location, plus a modest amount of additional employment land. The delivery mechanisms identified in the policy are private sector involvement (including S106 monies) and the Council in a partnership arrangement. Land identified for employment use.	Parc Afon Ewenni is part of the wider Waterton Industrial Estate. The estate provides a range and size and has good access to junction 35 of the M4 via the A473. The units are likely to remain in demand given its location and range of units available.	THe employment element has not been delivered, but remains a reasonable prospect especially given it would attract public / private funding.	Retain	Retain
No major environmental or amneity constraints, although the site is within 500m of a Main River.							A small industrial estate accessed off Coity Road, backing onto residentaial with a storage facility immediately adjacent to the east. No new land identified for new employment.	Small industrial estate of dated units that are generally well occupied. Given its proximity to residential the estate could come under pressure for redevelopment should vacancy start to increase.	Although the site is small and is adjacent to residential it remains well occupied.	Retain	
Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. Additionally, Ewenny River flows through the site, giving rise to potential water quality impacts from development.	Transport Assessment, Air Quality Assessment, Assessment of impacts on water quality	Y	N	N	N	N	A site of regional importance, part of the wider southern Bridgend industrial area, situated alongside the A473 dual carriageway and the A48. The principal occupier is Ford, and other occupiers include Biomet, manufacturers of medical equiptment, John Raymond warehousing and logistics and SAS International who manufacture suspended ceilings. The quality of the environment together with its strategic position and good access have made this estate very attractive to developers and occupiers. The Ford plant is central to the site, and immediately north of the Brocastle strategic site. The avaialble employment land is situatied immediately to the west of Ford.	The area is an attractive location which has a number of large occupiers such as Ford with their engine plan, Lidl with their relatively new regional distribution centre and Owens with the large distribution unit. Although the units at Waterton are dated, given the site's access to junction 35 of the M4 the site will remain attractive to occupiers. The main potential development opportunity will depend on the existing Ford site becoming vacant. The current size of the Ford factory means it is unlikely to be suitable to a single occupier and will need to be subdivided into smaller units. The factory's current layout is likely to mean that major works will be required to subdivide the unit – which could be economically unviable	This site isa key component of the southern Bridgend industrial area, links with the strategic site immediately to the south. The available land is suitabl;e for employment use. However, the current uncertainties over Ford mean there could be some vacancy in the future. However, the location is attractive for employment uses, and if some floorspace does become vacant it may be reoccupied in whole or through sub-division, or could need the introduction of smaller business units.	Retain	Retain
Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. No other major environmental or amenity constraints.	Transport Assessment, Air Quality Assessment	Y	N	Y	N	N	Located on the eastern side of the Llynfi Valley approximately 1.5 miles north of Maesteg town centre. The site comprises reclaimed land encompassing the former Coegnant colliery, spoil tip and railway sidings. PLA3(6) anticipated that the regeneration of the area - housing and a playing field plus some employment - would be delivered through the WVRF and the private sector (including S106) . There is a resolution to grant permission for a sports centre on the adjacent site.	Occupier demand in the area is relatively weak and development is unviable in this area, as such it is unlikely this site will come forward in isolation without cross-subsidy either as part of a mixed-used development or with public sector intervention.	This site is a long standing employment allocation, which even with the benefit of cross subsidy funding has little prospect of attracting employment use in this Plan period and beyond…There is limited scope for development for additional employment floorspace in Maesteg, and the Ewenny Road site that has land available is a more attractive site for employment use.	Regeneration	Regeneration
Site situated immediately west of llynfi River and within Flood Risk Zone C2, giving rise to potential impacts on water quality and flooding from construciton and operational activities. Additionally, the site is outwith 2km from the Strategic Road Network. No other major environmental or amenity constraints.	Flood Consequences Assessment. For proposals discharging into llynfi River - assessment of water quality impacts	N	N	Y	Y	N	A long established industrial area, but currently a cleared site that is close to Maesteg town centre and 11 kms north of J36 M4. It is served by Ewenny railway station., but of critical importance in this area, its key advantag is that it is flat. Like the other regeneration areas in Maesteg PLA3(7) anticipated that the regeneration of the area - housing , retailing plus some employment - would be delivered through the WVRF and the private sector (including S106) .	Cleared flat site located in close proximity to Ewenny Road Station, part of the site is in Council ownership. Site could come forward as part of a mixed use development, with small units likely to be popular in this location. But given issues with viability the site is likely to need public subsidy to bring forward.	This site remains suitable and available for significant mixed use development, and should be the focus for all available cross-subsidy opportunities for Maesteg.	Retain	Retain

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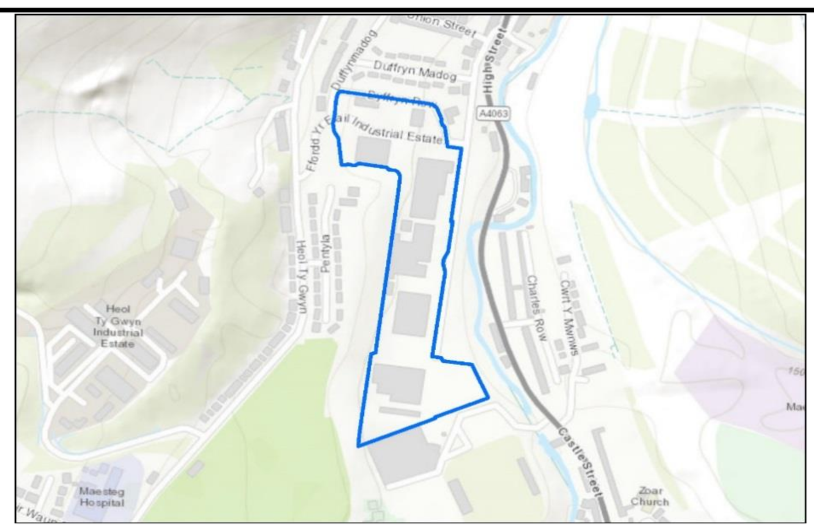
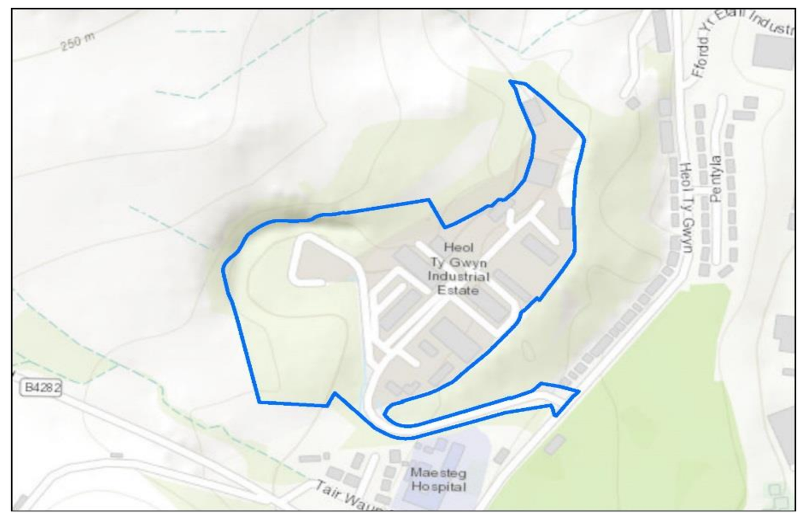
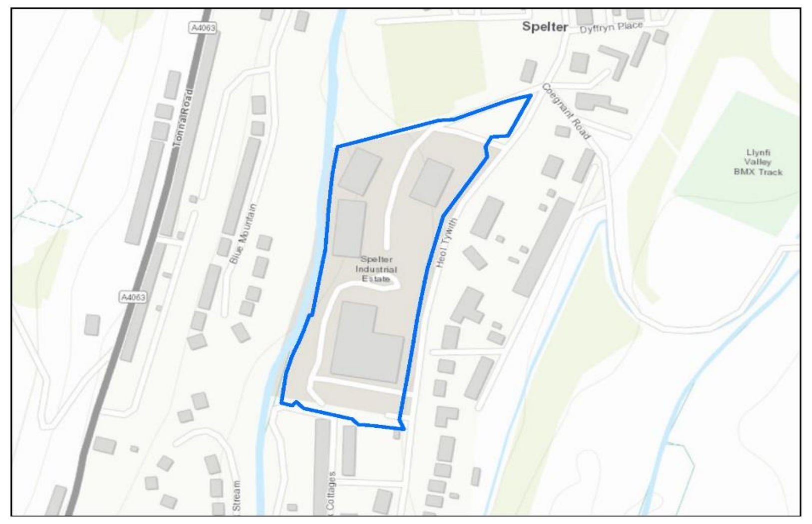
Site name	Location map	LDP Policy Number	AREA: Total area (ha)	AREA: Vacant land (ha)	AREA: Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors: 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors: 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Forge Industrial Estate, Maesteg		REG1(11)	4.98	-	-	Y	N	N			Y	N	Y - with mitigation	N
Heol Ty Gwyn, Maesteg		REG1(12)	7.84	2.91	-	Y	N	Y	Y	N	Y	N	Y	Y
Spelter Industrial Estate, Maesteg		REG1(13)	2.51	-	-	Y	N	N				N	Y - with mitigation	N
Glan Road, Porthcawl		REG1(14)	0.26	-	-	Y	N	N				N	Y - with mitigation	
Pwll y Waun, Porthcawl		REG1(15) & PLA3(9)	4.61	-	-		N	N				N	Y	Y

2.3	2.4	3. Strategic Planning Factors									
		3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
Site situated west of llynfi River, giving rise to potential impacts on water quality and flooding from construciton and operational activities. Outwith 2km from Strategic Road Network.	For proposals discharging into llynfi River - assessment of water quality impacts						A fully build-out site accommodating a small number of moderately large units, of a mix of ages benefiting from site being flat.	Dated industrial units that are currently well occupied. The units are relatively large for the local market, their configuration means they will be difficult to subdivide should they become vacant. Although they are relatively large for the local market but given the typography of the area there are no competing sites in close proximity which can satisfy the need for larger unit. Therefore the site should be protected.	A well occupied estate that because it is flat, could attract redevelopment opportunities in the future.	Retain	
Site is outwith 2km of the Strategic Road Network and within 500m of a Main River.		Y	N	N	N	N	Estate is situated in an elevated location to the west of Maesteg town centre, accessed off Heol Ty Gwyn, approximately 15 kms from J36 M4. The estate is largely developed for small-scale local businesses, but also includes the recycling depot and undeveloped land immediately to the south of the depot. The undeveloped land slopes considerably slope.	Established industrial estate which serves a local need. Although the units are dated, they provide a range of sizes and are generally well occupied and are likely to remain in demand through the plan period especially given the lack of credible alternative accommodation in the local area.	Providing for local business needs in a range of unit sizes, this estate is generally well occupied. The recycling depot should be retained within the boundary as there may be opportunity in the future to relocate and redevelop the land. The land identified for employment has fundamentasl topographical constraints, and is not suitable to carry forward.	Retain	Regeneration
The site is located on the eastern bank of Ilynfi River, giving rise to potential impacts on water quality from construciton and operational activities. Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts.	Transport Assessment, Air Quality Assessment. For proposals discharging into llynfi River - assessment of water quality impacts						A small industrial estate that is fully built-out. No avalable employment land.	Small industrial estate comprising 13 units, with some companies occupying more than a single unit. The main occupier on the site is Talgarth Bakery. The units are of reasonable quality. Should Talgarth Bakery vacate than this will leave a relatively large amount of space on the market, which may take time to re-let.	Providing for local needs, but not in an area with high demand.	Retain	
The site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts.	Transport Assessment, Air Quality						A micro-employment site, and the only designated site in Porhcawl. The site caters for local service needs. The buildings are dated, and the surroundings are dominated by residential.	Although the site is not ideal for employment use, being constrained in nature, the site is the only designated employment site in the town.	The site provides for local services needs and is importnat for that reason. Furture redevelopment for light industrial uses should be encouraged.	Retain	
The site includes Ger-Y-LLyn Pond and is located east of Porthcawl Primary School. Additionaly, the site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. The site is also within 1km of Kenfig / Cynffig SAC and MertherMawr SSSI.	Transport Assessment, Air Quality	Y	N	N	N	N	A regeneration site (PLA3(9)) in Porthcawl that was identified for a small amount of employment (0.7 ha) that has now been redevelopmed for residential .	-	The site redevelopment did not include any employment uses.	Release	

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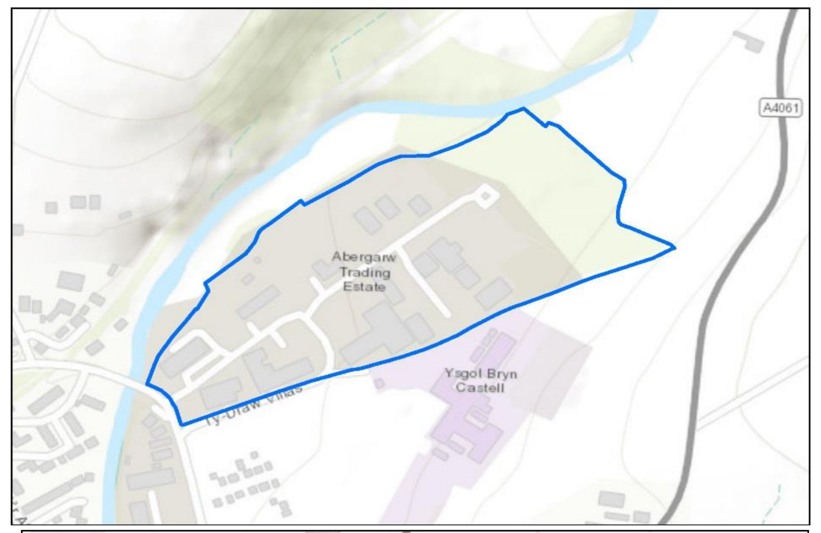
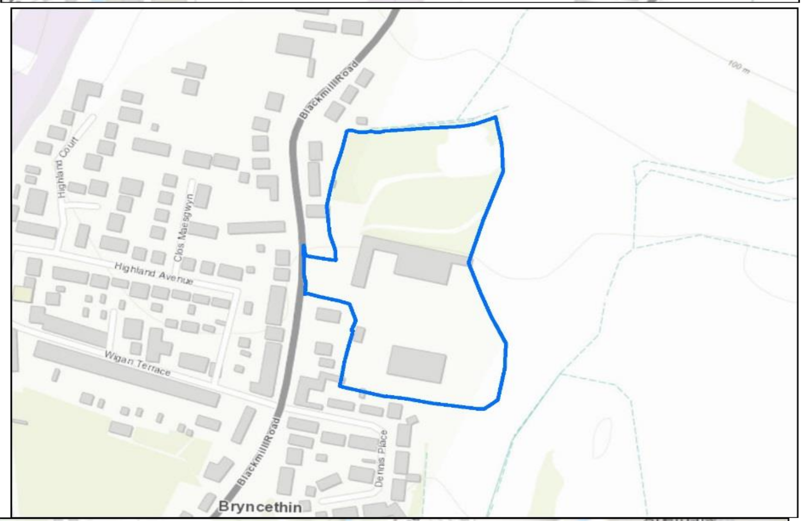
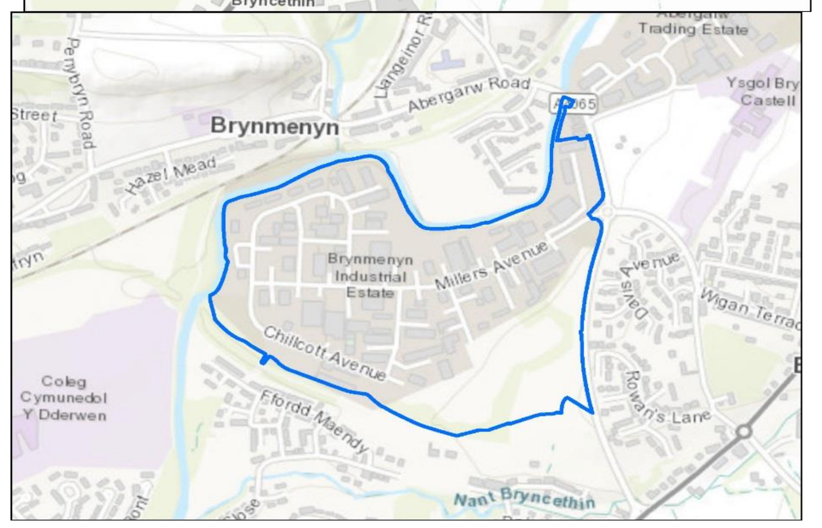
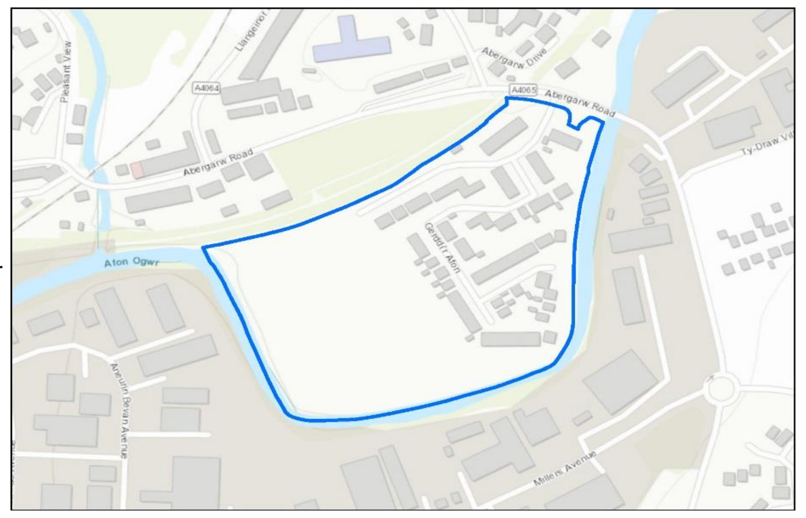
			AREA			1. Market Attractiveness Factors 1.1	1.2	1.3	1.4	1.5	1.6	1.7	2. Sustainable Development Factors 2.1	2.2
Site name	Location map	LDP Policy Number	Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	Has the site been formally identified for employment for at least 10 years?	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	Is the site being actively marketed as an employment site?	Is the site owned by a developer or another agency known to undertake employment development?	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Abergarw Industrial Estate, Brynmenyn		REG1(16)	9.28	1.43	1.43	Y	N	N			Y	N	Y - subject to mitigation	Y
Bryncethin Depot		REG1(17) & PLA3(14)	2.97	-	-	Y	N	N				N	Y	Y
Brynmenyn Industrial Estate		REG1(18)	29.32	6.94	2.00	Y	N	N			Y	N	Y - with mitigation	N
Former Christie Tyler Site		REG1(19) & PLA3(11)	5.51	2.00			N	N				N	Y - with mitigation	N
Enterprise Centre, Tondu		REG1(20)	1.96	-	-	Y	N	N				N	Y	Y

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2.3 Sustainability Appraisal Commentary	2.4 Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)	3. Strategic Planning Factors 3.1 Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?	3.2 Is the site identified or likely to be required for a specific user or specialist use?	3.3 Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	3.4 Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	3.5 Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	Site Information:	Market Commentary:	Conclusion:	Recommendation (existing built land):	Recommendation (vacant land):
Whilst not within Flood Risk Zone C, the site is situated immediately south east of Orgmore River, giving rise to potential impacts on the water environment from construction and operational activities. Additionally, the site is located within 1km of Blackmill Woodlands SAC and SSSI.	For proposals discharging into Ogmore River - assessment of water quality impacts	Y	N	N	Y	Y	Located east of the A4064 at Abergarw and within 1.5 kms of J36 M4, the site is predominantly flat. Access is from Abergarw Road that also serves Ogmore School (a special needs school) ,which could give rise to conflict. The parcel of available land is at the eastern end of the estate.	Established industrial area with a mix of age and size of units. The estate is well occupied and is likely to remain popular given its access to the motorway.	The estate's close proximity to the M4 J36 makes it popular with industrial occupiers. The available land is likely to attract occupiers and be taken up within the mnext Plan period.	Retain	Retain
The site is within 1km of Blackmill Woodlands SAC & SSSI and within 500m of a Main River. No other major environmental or amneity constraints.		Y	N	N	N	N	Due to its relationship with the urban area of Bryncethin, this site is identified as having opportuniy fto provide retail and residential uses to support the regeneration of the area (PLA3(14)). The relocatiion of the depot has been secured to REG1(6) Parc Afon Ewenni.	-	This site is no longer identified as an employment site.	Release	
Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. No other major environmental or amenity constraints.	Transport Assessment, Air Quality Assessment	Y	N	Y	N	N	A modern well maintained industrial estate, located south of the Ogmore and Garw valleys, only 1.5 kms north of the M4, adjoining the former Christie's site immediately to he north and close to the Abergawr IE . The available employment expansion land is greenfield to the southeast. The available land has recently been promoted as a candidate site for mixed use. There is also pre-application advice being sought for a residential scheme on the employment land.	Established industrial estate which provides range of size and quality of units. The estate is well occupied and given its links to the motorway it is likely to remain attractive to occupiers.	The market interest in the Brynmenyn area is reasonable, but unlikely to deliver all the available land here, the 2 ha at Christies and the 1.4 ha at Abergawr to the north. It is sensible to offer choice to the market by retaining employment land allocations at two of these three sites, but accepting that here an extension to the existing estate is most likely to be delivered through provision of cross-subsidising residential development on the majority of the site.	Retain	Retain
The site is bounded to the west, south and east by Ogmoe River, giving rise to potential impacts on water quality from development. No other major environmental or amenity impacts.	Assessment of impacts on water quality						The site is promoted as a regeneation site (PLA3(11) for residential and employment. The policy recognises that the site does not link into the Brynmenyn IE immediately to the south, and does not therefore offer the opprotunity for integration between the two areas. The northern half of this site has been developed for the housing element, lwith the 2 ha employment land still undeveloped. The lack of interconnectivity betweeen the existing estate and the available employment land is a deliverability issue. Connectivity between the estate and the other site idntified for employment development - REG1(18) is much better with estate roads providing ready access into Brynmenyn IE.	Despite this site sharing similar locational factors to Brynmenyn Industrial Estate and Abergarw Industrial Estate the development of the residential on part of the site has the ebbed its suitability for employment use. Furthermore, the availability of land on the neighbouring estates means that it is not critical retain this land for future employment needs.	The greater intergration opportunities for land south of Brynmenyn IE compared with this site suggest REG1(18) should be the site to take forward in what is a limited market for additional employment land in this area.	Release	Release
The site is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. Also within 500m of a Main River. No other major environmental or amenity constraints.							A small industrial estate predominantly serving local needs. No available land.	Small industrial estate providing a range of small units which serve an important local need.	This site is fully built out and largely providing for local needs.	Retain	

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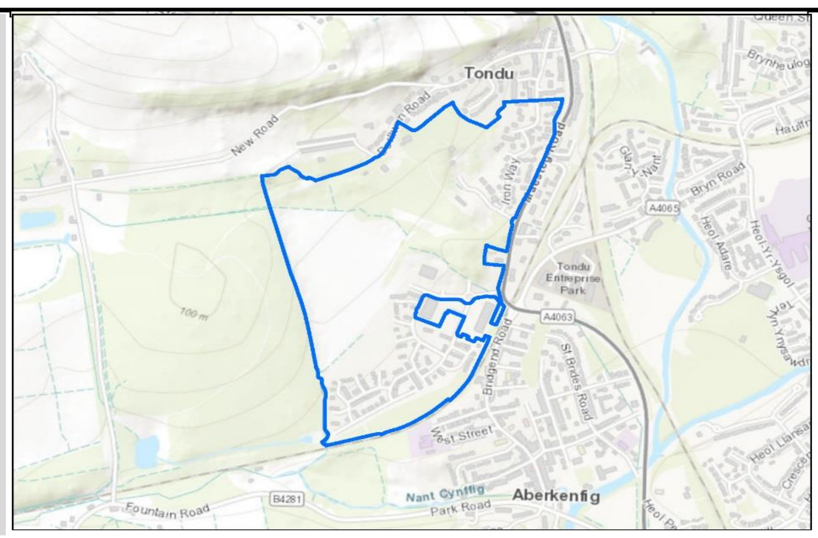
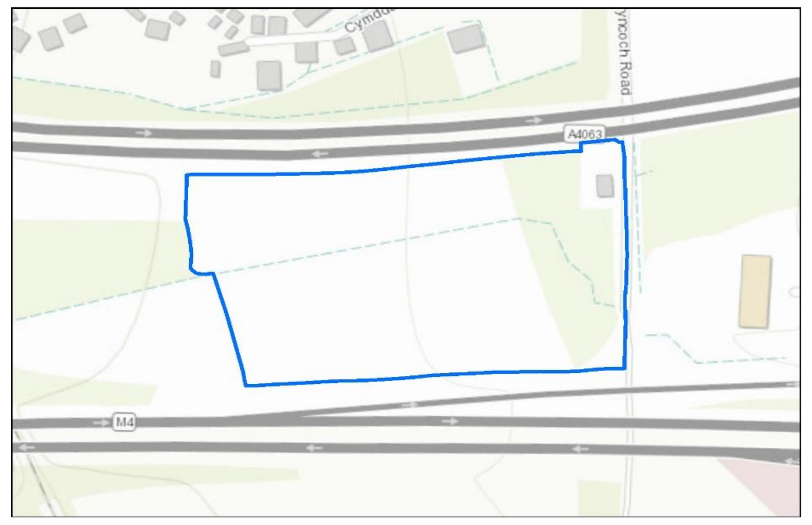
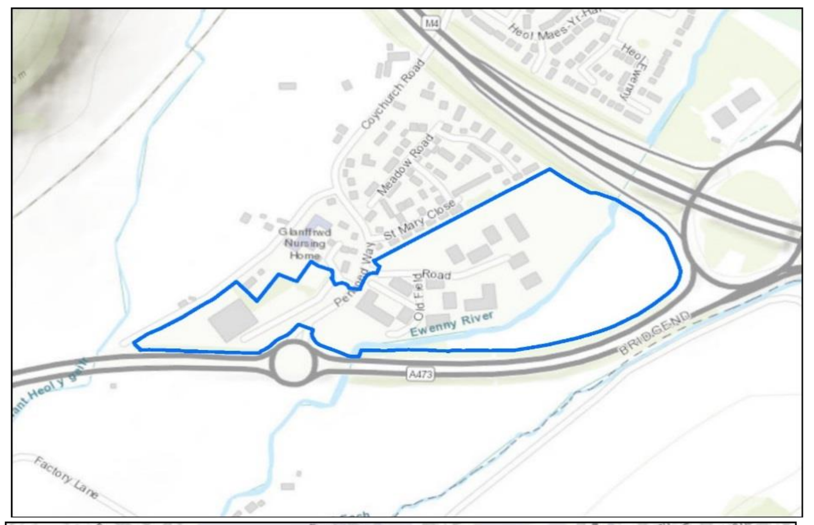
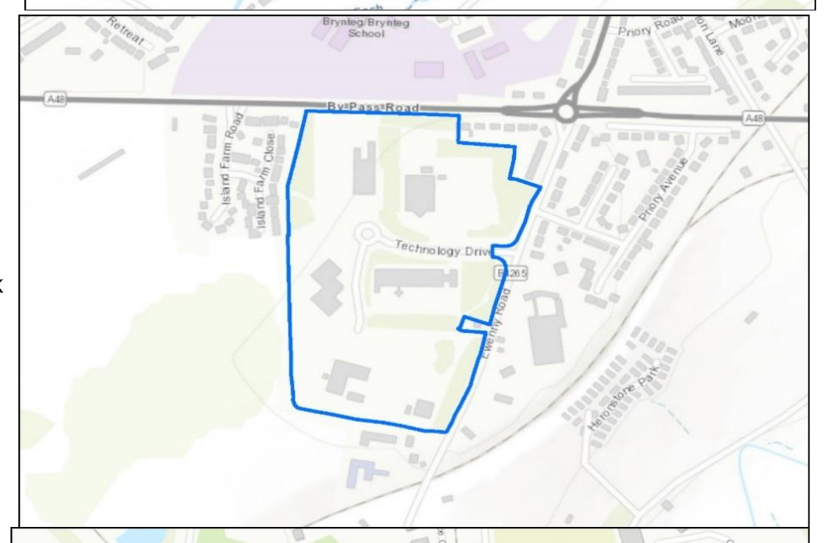
Site name	Location map	LDP Policy Number	AREA Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Land at Tondu		REG1(21) & PLA3(10)	17.00	0.25	0.25		N	N				N	Y - with mitigation	N
Land adjacent to Sarn Park Services		REG1(22)	2.74	2.73	2.73		N	N				N	Y	N
The Triangle Site, (Bocam Park), Pencoed		REG1(23)	9.90	1.02	1.02	Y	N	Y				N	Y - with mitigation	Y
Bridgend Science Park		REG1(24)	11.86	1.00		Y	N	N	Y	N	Y	N	Y	Y
Crosby Yard, Bridgend		REG1(25)	1.89	0.82	0.82	Y	N	N				N	Y - with mitigation	Y

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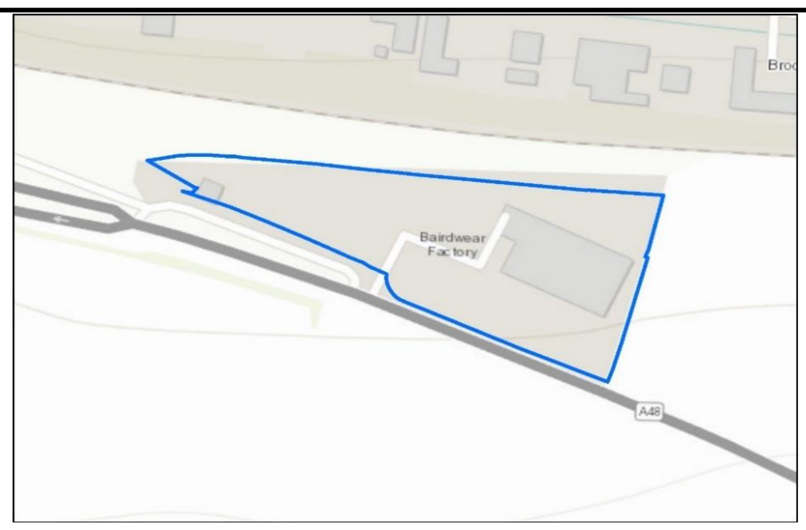
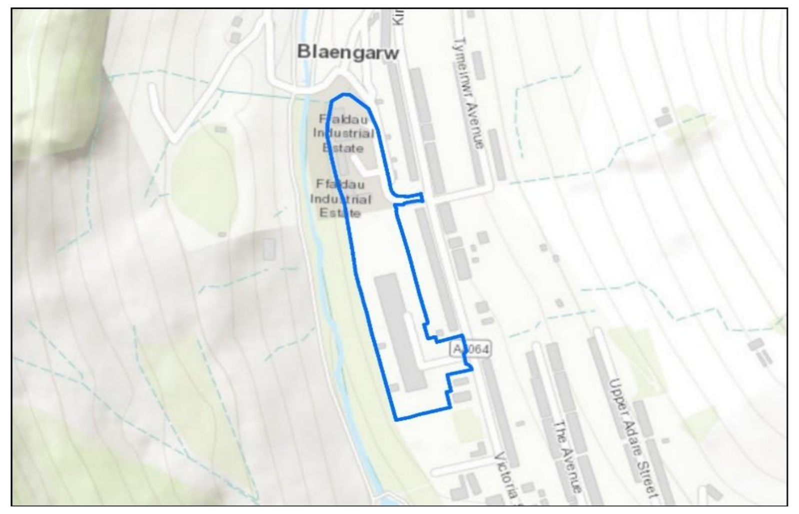
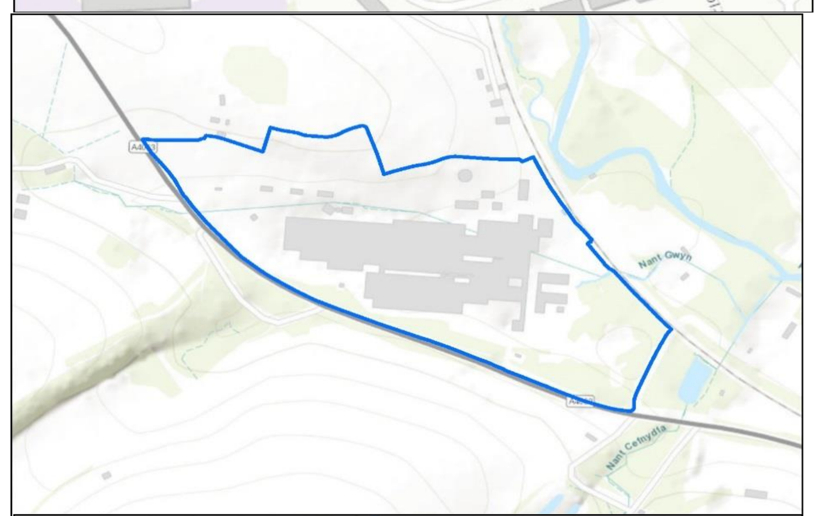
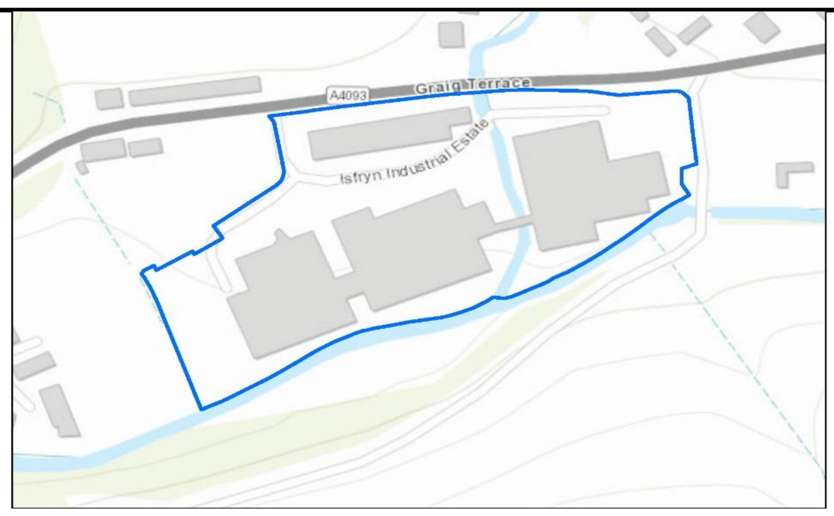
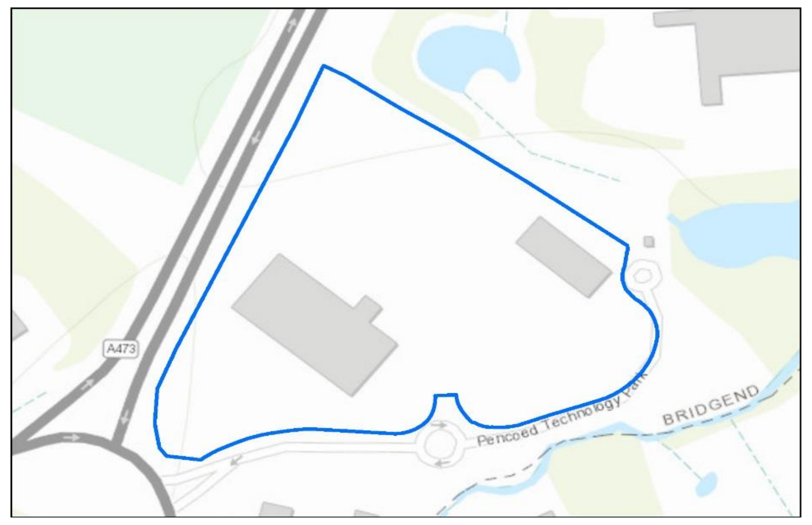
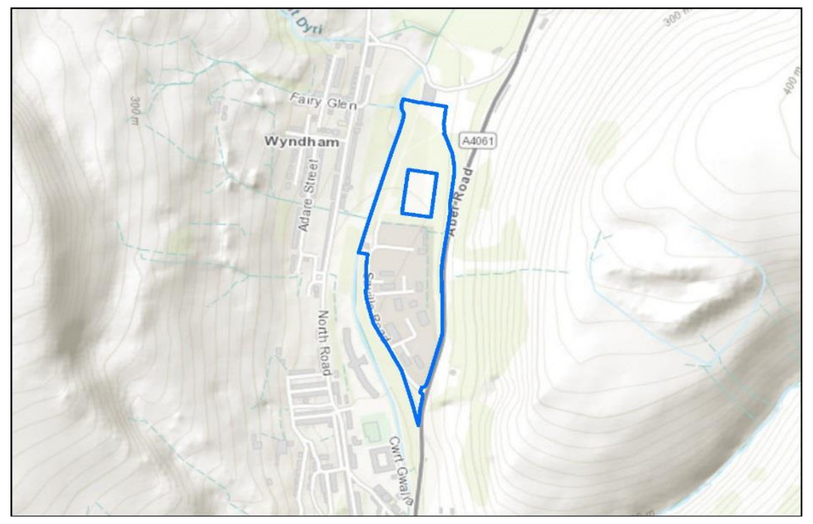
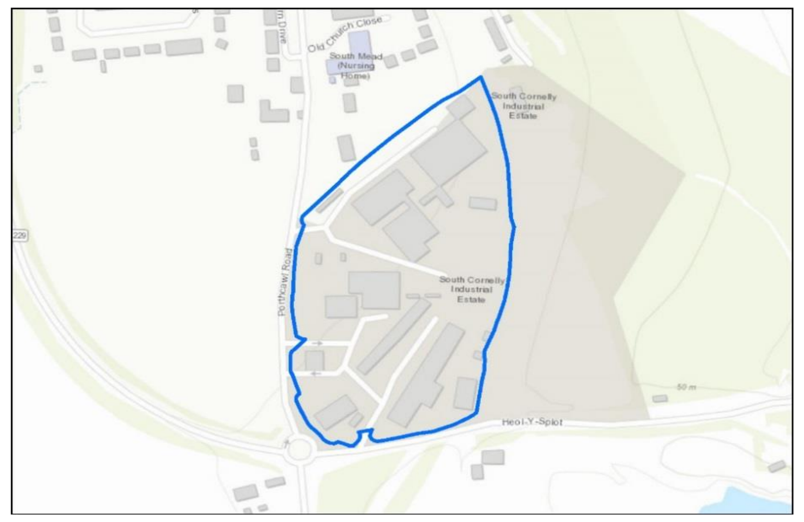
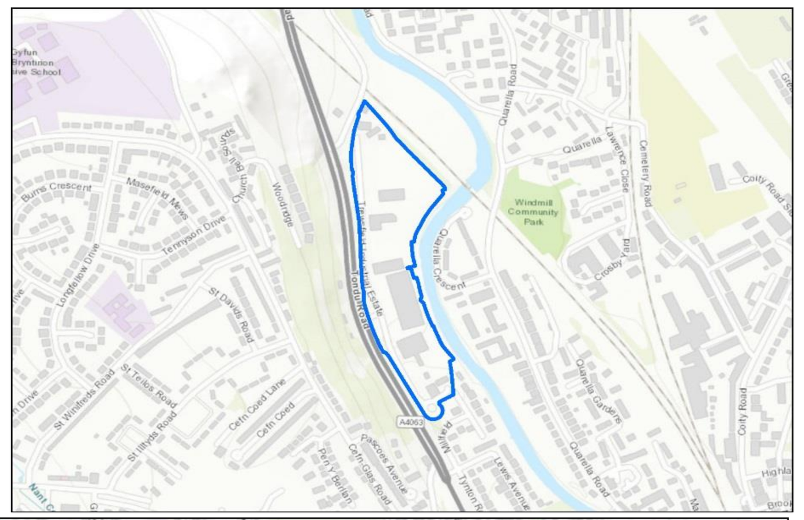
2.3	2.4	3. Strategic Planning Factors 3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
Site is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. Additionally, the site includes Ancient Woodland and Important Trees, Hedgerows or TPOs. The site is also withn 500m of a Main River.	Transport Assessment, Air Quality Assessment, Arboricultural / Ecological Assessment	Y	N	N	N	N	The site is located om the western edge of Tondu village 2.5 kms north of M4 J36. The core of site was previously developed land (NCB offices). Access is via the A4063 , which to facilitate the full development of the whole site requires upgrade. The site is identified as a Strategic Regeneration Growth Area within the Valleys Gateway (PLA3(10)), and has seen considerable redevelopment in recent years. Development here is expected to come forward through private development, albeit utilising S106 funds. Outline planning consent was granted in Nov 2018 for the remaining land for up to 450 houses and 1,000 sq m of employment land (site area estimated at 0.25 ha). The location of the employment land within the sirte is not fixed.	Site would be suitable for small flexible work space units, but will require the residential element to cross-fund the development as not viable as standalone.	The scheme curently in planning proposes only a very minor element of employment as part of mixed use proposa (0.25 Ha).	Retain	Retain
Within 500m of a Main River. No other major environmental or amenity constraints.							Greenfield site wedged between the M4 and A4063 immediately south of Sarn village and adjoining Sarn Park services at M4 J36.	Site's location and configuration makes it attractive to B8 occupier, but viability will be a challlenge without a pre-let in place.	An attractive site for logistics/ warehouse occupiers, one of very few in the Borough that should be retained to allow for market choice.	Retain	Retain
Ewenny River flows through the site, giving rise to potential water quality impacts from development. No other major environmental or amenity constraints.	Assessment of impacts on water quality	N	N	N	N	N	A largely developed office park in a prominent gateway location at Pencoed, adjacent to M4 J35. The Park has excellent access to the Mway via the A473 dual carriageway, It is located in the south-west quadrant of M4 J35, with the Pencoed Technology Park on the diagonally opposote quadrant to the north. The proximity to the Technology Park provides supply chain opportunities.	Good quality office park with excellent link to M4 J35. There is some vacancy on the park, but it is offered on flexible size ranges and competitive rents therefore vacancy is not a concern. Given the lack of modern purpose build space in the borough this is likely to remain popular for occupiers. Viabilty for new space is challenging but given the sites location and suitable surrounding uses the site should be protected for emplyment.	This is one of only two office park deveopments in the Borough. There is only a one ha parcel remaining.	Retain	Retain
Site is outwith 2km of the Strategic Road Network but is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. Additionally, the site is within 500m of a Main River. No other major environmental or environmental constraints.	Transport Assessment, Air Quality Assessment	N	Y	N	N	N	Largely built out and occupied by high technology businesses such as CGI, and information services firm who also operate from other premises in the Borough. Only 1 ha remains undeveloped, and this is reserved for the future expansion of CGI. Because the remaining land is owned by and reserved for a specialist R&D use and therefore not available for the general office or light industrial market, it does not contribute to land availability.	The Council actively manage the Science Park, and their flexible letting strategy (in terms of type of occupier and lease terms) means it is attractive to occupiers in an area where there is no competing supply.	The vacant land is identified for the future expansion of an existing business, and is therefore not available to the general market.	Retain	Existing business expansion
The site includes important Trees, Hedgerows or TPOs, and is within 500m of Orgmore River.	Arboricultural / Ecological Assessment	N	N	N	N	N	A small industrial area containing small industrial units, but with access constraints common for industrial units located within the built-up urban area. The 0.8 ha of available land is a narrow triangular 'wedge' bounded by railway on two sides with dense tree cover.	Industrial estate provides a number of smaller units which are attractive to the local market. Units are likely to remain in demand for tenant given it meets a local need.	Whilst there continues to be demand for smaller units in this area, and little alternative choices, the poor access arrangements will not lead to long term vacncy. The vacant land may be taken up, but would diliver a small amount of floorspace, and may be better utilised for open storage.	Retain	Retain

Bridgend County Borough - Employment sites assessment

Site name	Location map	LDP Policy Number	AREA Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Dunraven House, near Pyle		REG1(26)	1.70	-	-	Y	N	N				N	Y - with mitigation	Y
Ffaldau Industrial Estate, Blaengarw		REG1(27)	2.35	-	-	Y	N	N	N		Y	N	Y	Y
Land at Gibbons Way, North Cornelly		REG1(28) & PLA3(18)	1.71	0.03	0.03		N	N				N	Y	N
Papermill, Llangynwyd		REG1(29)	21.05	2.32		Y	N	N	N	N	Y	N	N	Y
Green Meadow, Llangeinor		REG1(30)	3.85	-	-	Y	N	N	N	N	Y	N	Y - with mitigation	Y

		3. Strategic Planning Factors									
2.3	2.4	3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
The site is within 500m of an identified traffic congestion point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts.							Single occupier site 'wedged' between the A48 and the railway 1 km south of Pyle district centre. Site is occupied by Suntrade manufacturing for the construction sector. Fairly low density building coverage due to comparatively large outdoor storage and narrowness of site configuration. No available land for employment development. Would need compprehensive site redevelopment to deliver floorspace expansion.	Site remains attractive to existing single occupier; Dunraven. We are not aware that they wish to vacate their site and the site should remain for employment use. Should the existing occupier vacate then the site should be reassessed for its suitability at that point in the property cycle.	Should the occupier vacant and the premises prove difficult to re-occupy, this would be a difficult site to find alternative uses because it's remoteness from Pyle, servered by the railway makes residential less attractive, and the modest size and awkward configuration mean it is too small to be identified as a regeneration site.	Retain	
The site is outwith 2km of the Strategic Road Network and within 500m of a Main River. No other major environmental or amenity impacts.		N	N	N	N	N	Fully developed industrial site providing starter units, in the Garw Valley. The A4064 links the site toM4 J36, six miles to the south. No available land for employment development.	The estate comprises the Corilla Plastics site and a mix of smaller units. The smaller industrial estate meets a local need. The Corilla Plastics site is a relatively large (for the local context) and dated unit that is unlikely to split into smaller units, which will make it a challenge to be re-occupied should Corilla Plastics vacate. We are not aware Corilla Plastics wish to vacate their site, so the site should remain for employment use. Should they vacate then the site should be reassessed for its suitability at that point in the property cycle.	It may be difficult to subdivide some of the large units should the main occupier vacate. But the site is occupied, and should be retained as a designated employment site.	Retain	
The site is within 500m of a Main River. No other major environmental or amenity constraints.							Land within a residential housing estate. The employment element will deliver local opportunities, and therefore has significant social value. The regeneration policy (PLA3(18) identifies this site predominantly for housing, with community facilities and only a tiny amount of employment. The site is cleared, and the policy anticipates delivery will be through public / private sector funding, including S106 contributions.	Due to rents achievable, site viability will be a challenge without public sector intervention. New space will help provide new stock in an area where current availability is low.	Employment elelment should be retained and delivered through cross-funding from the housing element.	Retain	Retain
The site is outwith 2km of the Strategic Road Network. No other major environmental or amenity constraints.		N	Y	N	N	N	A remote site on the A4063 midway between Maesteg and Bridgend, surrounded by farmland and countryside. The whole site is occupied by the Northwood and WEPA papermill. There is land (2.3 ha) potentially available for development, but this is safeguarded for the mill's future expansion needs, and as such is not available for the general market,. The site therefore does not contribute any land to the general supply.	Site remains attractive to existing single occupier; WEPA as a papermill. We are not aware that they wish to vacate their site. The site should remain for employment use but given the site's location and specialise nature, should the existing occupier vacate then the site should be reassessed for its suitability at that point in the property cycle.	Safeguarded for the future expansion needs of the occupier. No available land for general market employment development.	Retain	Existing business expansion
The site is bounded to the west by a tributary of Ogmore River and is located outwith 2km of the Strategic Road Network. No other major environmental or amenity constraints.	Assessment of impacts on water quality						Site in single occupation - IrvinGQ - a manufacturer, and fully built-out. Four miles north of M4 J36. No available development land.	Single occupied site which is a relatively large (for the local context) and dated unit. Should the existing occupier vacate the unit may not be re-occupied due to it size. The current configuration means it is unlikely to split into smaller units, which would be more attractive to the local market.	It may be difficult to re-occupy or subdivide this large unit should the main occupier vacate. But the site is occupied, and should be retained as a designated employment site.	Retain	

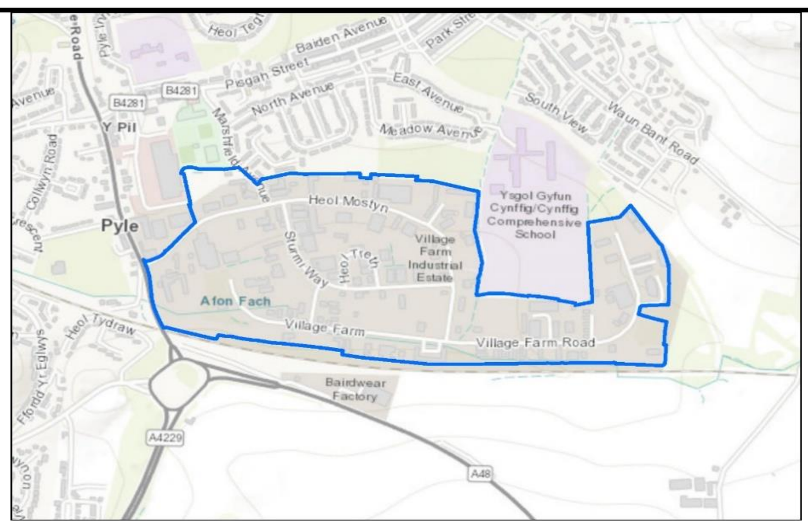
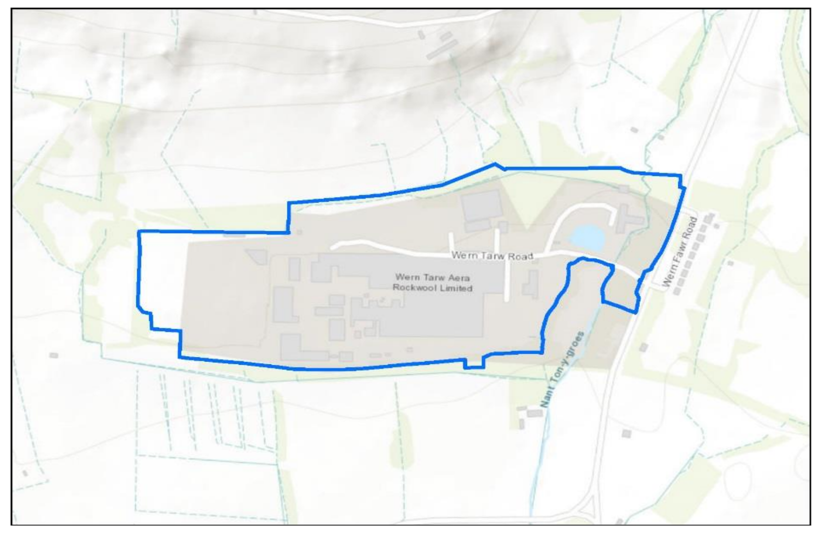
Bridgend County Borough - Employment sites assessment

Site name	Location map	LDP Policy Number	AREA Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Isfryn Industrial Estate, Blackmill		REG1(31) & PLA3(17)	2.92	0.40	0.40	Y	N	N				N	Y - with mitigation	N
Land SW Pencoed Technology Park (Pencoed Business Park)		REG1(32)	3.65	-	-	Y	N	N				N	Y - with mitigation	Y
Penllwyngwent, Ogmore Vale		REG1(33)	10.56	4.92		Y	N	N				N	Y	Y
South Cornelly Industrial		REG1(34)	4.19	-	-	Y	N	N				N	Y	Y
Trews Field, Bridgend		REG1(35)	4.86	-	-	Y	N	N				N	Y - subject to further justification (flood risk) and mitigation	Y - with justification (flood risk) and mitigation

Bridgend County Borough - Employment sites assessment

		3. Strategic Planning Factors									
2.3	2.4	3.1	3.2	3.3	3.4	3.5					
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
Ogwr Fach bounds the site to the south east and flows through the site, giving rise to potential impacts on water quality from development. Additionally, the site is located outwith 2km from the Strategic Road Network but within 500m of an identified traffic congestion point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts.	Transport Assessment, Air Quality Assessment, Assessment of water quality impacts	N	N	Y	N	Y	The site is four miles north of M4 J36, and comprises an office building and three large industrial buildings all occupied by Coppice Alupack, a metals manufacturing firm. The existing employment site is fully built-out, with a relatively high floorspace density. Landimmediately to the west of the existing employment area is identified for regenerative mixed use development (PLA3(17) - mostly residential, but with community uses and a small element of employment that will be delivered through public private funding including S106.	Site remains attractive to existing single occupier; Coppice. We are not aware that they wish to vacate their site and the site should remain for employment use. Give the remote nature of the site and the relative large units for the local market should the existing occupier vacate then the site should be reassessed for its suitability at that point in the property cycle.	The relative remoteness means it may be difficult to re-occupy or subdivide the larger units should the occupier vacate. But the site is occupied, and should be retained as a designated employment site. Demand in this area is weak, and the allocation of even a small area for employment is very unlikely to attact occupier(s) or a developer. Hence small allocation should not be carried forward.	Retain	Retain
Ewenni Fach flows through the site, giving rise to potential water quality impacts from development. No other major environmental or amenity constraints.	Assessment of impacts on water quality						The site is fully built out with two large buildings and large areas for parking. A highly accessible location with immediate access to M4 J36 with the Sony site immediately to the north and the Bocam Park office park to the south of the motorway junction. The main site occupier is Reneuron, a biomedical research business, and The National Imaging Academy Wales who recently took the former Sanken Power Systems unit. The site has been acquired by NHS Wales and permission granted in 2017 for a medical research facility.	Site located adjacent to junction 35 of the M4, as such is likely to remain attractive occupiers.	A site with excellent motorway access and supply chain/service opportunities from its proximity to other adjoining employment areas. Site fully built out.	Retain	
The site includes Ancient Woodland and TPO, Important Trees or Hedgerows. Additionally, the site is within 500m of a tributary of Ogmore River.	Assessment of impacts on water quality	N	N	N	N	N	Reclaimed colliery site within the Ogmore Valley. Approximately half the site has been redeveloped (the southern half) and includes local authority starter and intermediate employment units. The sports pitch in the middle of the remaining available land is a constraint on the attractiveness for employment development on the remainder of the site. A further constraint is the poor site access.	Existing industrial buildings are appropriate to meet local need. Vacant land is unlikely to be developed for future employment space to lack of viability.	The weak demand and lack of viability in this area make it very unlikely that the site will attract development for employment. The need for an upgrade to access arrangements and the centrally located sports pitch, compound the lack of attraction/demand, and strongly suggest the site would be better put to non-employment uses.	Retain	Regeneration
No major environmental or amneity constraints, although the site is within 500m of a Main River.							Industrial estate within 2 kms of M4 J37 with village immediately to the north, with large scale waste recycling and quarry employment uses nearby.	Well occupied industrial unit located in close proximity to jct 37 M7 via A4229 - therefore likely to remain popular to occupiers.	Existing designated employment area is likely to remain in demand. No available development land.	Retain	
The site is located in Flood Risk Zone C1 and lies on the southern bank of Ogmore River, giving rise to potential impacts on water quality from construciton and operational activities, but is not subejct to any other major environmental or amneity constraints.	Flood Consequences Assessment. For proposals discharging into Ogmore River - assessment of water quality impacts						Employment area 1 km to the north of Bridgend town centre located between Tondu Road and the Ogmore River. The generally medium sized units are occupied by a combination of car showrooms and cash and carry operators ratehr than employment. No available developable employment land.	Integrity of employment area lost due to non-B class uses occupying large elements of the site. Site remains attractive to existing occupiers. The site should remain for employment use but given quality of existing stock and lack of prominence within the existing employment area.	The stock is generally not currently in employment use, and if this is unlikely to change in the medium / longer term the area should be considered for release.	Retain	

Bridgend County Borough - Employment sites assessment

Site name	Location map	LDP Policy Number	AREA Total area (ha)	Vacant land (ha)	Carry forward vacant emplt land (ha)	1. Market Attractiveness Factors 1.1 Has the site been formally identified for employment for at least 10 years?	1.2 Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/ building regulations applications.	1.3 Is the site being actively marketed as an employment site?	1.4 Is the site owned by a developer or another agency known to undertake employment development?	1.5 Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	1.6 Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	1.7 Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	2. Sustainable Development Factors 2.1 Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/ greenfield considerations)?	2.2 Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?
Village Farm Industrial Estate, Pyle		REG1(36)	44.65	2.55	2.55	Y	N	N	N	Y	Y	N	Y	Y
Wern Tarw		REG1(37)	20.94	-	-	Y	N	N	N	N	Y	N	N	Y - subject to mitigation
			593.28	**63.79**	**43.70**									

2.3	2.4	3. Strategic Planning Factors 3.1	3.2	3.3	3.4	3.5				
Sustainability Appraisal Commentary	**Mitigation Required (technical assessments resulting in deployment of potential site specific mitigaiton if required)**	**Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP (Table 3.1)?**	**Is the site identified or likely to be required for a specific user or specialist use?**	**Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?**	**Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?**	**Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?**	**Site Information:**	**Market Commentary:**	**Conclusion:**	**Recommendation (existing built land):**	**Recommendation (vacant land):**
The site is within 500m of an identified traffic congestion pinch point (as identified by BCBC Highways), giving rise to potential congestion and associated air quality impacts. Also within 500m of Glaswelltiroedd Cefn Cribwr / Cefn Cribwr Grasslands SAC, although separated by built form and transport infrastructure.	Transport Assessment, Air Quality Assessment	N	N	N	N	N	A large established industrial estate on the A48 on the southern side of Pyle, less than 1 mile from M4 J37 . The key occupier is AMSS a manufacturer in the aerospace sector. There are a small number of undeveloped plots across the estate.	Large established industrial estate which provides a range of size and age of buildings - this combined with its access to the jct 37 M4 means that it will remain attractive to occupiers.	A successful large industrial estate, benefitting from immediate motorway access. The few remaining parcels are likely to come forward over the Plan period	Retain	Retain
The site encompasses Ancient Woodland and is within 1km of Brynna A Wern Tarw SSSI and a Main River. The site is also not within 2km of the Strategic Road Network.	Arboricultural / Ecological Assessment	N	Y	N	N	N	Single occupier heavy industrial activity (Rockwool factory) in a remote location north of Pencoed. The industrial activity (manufacturing insulation material) is partly contained in factory units and partly involves large areas of open storage. No available developable employment land.	Site remains attractive to existing single occupier; Rockwool. We are not aware that they wish to vacate their site. The site should remain for employment use but given the site's location, should the existing occupier vacate then the site should be reassessed for its suitability at that point in the property cycle.	The remoteness of this location, which is a benefit for the occupier given the heavy industrial nature of the business, means that should the site everr become available it would be difficult to re-occupy, subdivide or redevelop. But the site is occupied, and should be retained as a designated employment site.	Retain	