

Central Lancashire Employment Land Study

Chorley, Preston and South Ribble Councils



Technical Report - Final Report

November 2017

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1.0 INTRODUCTION

- 1.1 This Technical Report details the research undertaken to complete an employment land study for the Central Lancashire sub-region of Chorley, Preston and South Ribble. It has been carried out on behalf of Chorley and South Ribble Borough Councils, as well as Preston City Council. The document compliments the Executive Report which provides a summary of the key research findings.
- 1.2 The Central Lancashire Employment Land Study is required to provide a common evidence base for all three local authorities on employment matters, to compliment the Central Lancashire Strategic Housing Market Area Assessment. The evidence will be used to support the development of Local Plan documents for Central Lancashire.
- 1.3 It meets the requirement, set out in paragraph 158 of the National Planning Policy Framework that: *“Each local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals.”*
- 1.4 BE Group, economic development and property consultants, compiled this report during February-August 2017. The study updates and supersedes previous employment land evidence base documents for Central Lancashire, specifically the Chorley, Preston and South Ribble Employment Land Review to 2021 (2009). In the case of South Ribble, it compliments and updates the South Ribble Employment Land and Property Study, carried out on behalf of South Ribble Borough Council by BE Group in 2015.

Background

Central Lancashire Planning

- 1.5 The Central Lancashire Core Strategy was prepared jointly by Preston City Council, Chorley Council and South Ribble Council, and adopted in July 2012. It has the role of helping to co-ordinate development in the area covered by these councils. The

three local authorities have undertaken ongoing monitoring of the Core Strategy since that time. The three authorities are now undertaking an updated and expanded evidence base for Central Lancashire, which includes this Central Lancashire Employment Land Study, to inform further joint policy development work.

Preston, South Ribble and Lancashire City Deal

1.6 On 13th September 2013, Preston, South Ribble and Lancashire County Council, agreed a ‘City Deal’ to drive forward local growth. Over a ten-year period, the City Deal aims to generate over 17,000 new homes; create more than 20,000 jobs, and provide for £434 million in new infrastructure, including the completion of the Penwortham Bypass and the South Ribble Western Distributor. This funding is expected to leverage a further £2.3 billion of commercial investment into housing and employment sites. In addition, The City Deal will be complimented by a new £100m investment fund, created by Lancashire County Pension Fund.

1.7 Key City Deal projects, and associated growth areas, include:

- *Bamber Bridge* – A range of transport and infrastructure improvements are planned in the Town Centre. Several new housing developments are planned, and several employment sites have been identified, including the South Rings, where new employment space has recently been delivered
- *Leyland and Cuerden* – The widening of Flensburg Way between the tank roundabout and Longmeanygate. This will support a new housing and employment development on the Former Moss Side Test Track. The Cuerden Strategic Site will also provide a strategic employment site for the North West at the western terminus of the M65
- *North East Preston* – There will be investment in the route through Longridge, Grimsargh and Ribbleton to the City Centre. A number of employment sites have been identified as having further capacity for development including Red Scar, Roman Road Farm and Bluebell Way. New housing developments are planned for Whittingham Hospital, land north and south of Whittingham Road and Inglewhite Road
- *North West Preston* – The Broughton Bypass will relieve pressure on the A6. The new Preston Western Distributor will help improve travel times to the Enterprise Zone at Warton and will give better access to 4,000 new homes planned for North West Preston. Several employment sites have been identified including land off Eastway and in the Cottam area
- *Penwortham and Lostock Hall* – The widening of the A582 and the new

Penwortham Bypass to improve travel times to Preston City Centre and the M6, and relieve congestion through Penwortham. New housing developments are planned for Vernon Carus, Lostock Hall Gasworks and Pickerings Farm, and a number of employment sites have been identified

- *Preston City Centre* – Investment in a new streetscape along Fishergate and the in Winckley Square area is largely complete. Preston Bus Station will also see an overhaul and new Youth Zone is planned. New city centre and surrounding area housing is also proposed, and several employment sites have been identified in this area.

- 1.8 This study reflects the context of the Preston, South Ribble and Lancashire City Deal, and the impact this will have on economic growth and future demand. Accordingly, ‘Policy On’ employment forecasts have been completed in Section 8.0 which make allowance for the projected growth in jobs which could be accrued from City Deal, Samlesbury Enterprise Zone (see below) and the Cuerden Strategic Site. These forecasts relate to Preston and South Ribble only.

Lancashire Advanced Engineering and Manufacturing Enterprise Zone

- 1.9 The Study will also consider the impacts of the Samlesbury Enterprise Zone, which forms part of the wider Lancashire Advanced Engineering and Manufacturing Enterprise Zone (Lancashire Enterprise Zone) alongside the other BAE facility at Warton. Collectively, these zones have the potential to provide up to 6,000 direct jobs and 5,000-7,000 in the local supply chain.

Methodology

- 1.10 Research methods used include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with Central Lancashire’s major developers/landowners, Parish/Town Councils and key public-sector agencies. A telephone survey of 850 local businesses was completed (300 each in Preston and South Ribble, 250 in Chorley), while 71 larger companies were approached for more detailed face-to-face discussions. Desktop analysis of national, Central Lancashire/Lancashire and local reports and strategies has been undertaken.
- 1.11 The Functional Economic Market Area (FEMA) of Central Lancashire is identified using methods identified in Planning Practice Guidance (PPG) and the property market in the local authority areas within the FEMA has been reviewed. This has

been undertaken through consultations with officers from the relevant Councils, combined with desktop analysis of the Employment Land Studies and Local Plans of those local authorities.

1.12 Finally, the land supply has been assessed against forecast and population/housing data to understand the future need for any additional employment land. This is then developed into a series of economic development recommendations that cover not just land, but also premises.

1.13 Attached at Appendix 1 is a list of all consultees.

Employment Land Review Guidance

1.14 The Employment Land Study will need to take account of PPGs, which provide guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes have been produced – *Housing and Economic Land Availability Assessment*, which provides a methodology of reviewing suitable land, and *Housing and Economic Development Needs Assessments*, which provides guidance on how future needs can be determined. The assessment process takes the form of a five-stage methodology under the following headings:

- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a desk top review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review
- **Stage 2: Site/broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability', to confirm which of them are unsuitable for/unlikely to continue in B1/B2/B8 employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:

- *“The recent pattern of employment land supply and loss to other uses (based on extant planning permissions and planning applications). This can be generated through a simple assessment of employment land by sub-areas and market segment, where there are distinct property market areas within authorities.*
- *Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums).*
- *Market signals, such as levels and changes in rental values, and differentials between land values in different uses.*
- *Public information on employment land and premises required.*
- *Information held by other public-sector bodies and utilities in relation to infrastructure constraints.*
- *The existing stock of employment land. This will indicate the demand for and supply of employment land and determine the likely business needs and future market requirements (though it is important to recognise that existing stock may not reflect the future needs of business). Recent statistics on take-up of sites should be consulted at this stage, along with other primary and secondary data sources to gain an understanding of the spatial implications of ‘revealed demand’ for employment land.*
- *The locational and premises requirements of particular types of business.*
- *Identification of oversupply and evidence of market failure (e.g. physical or ownership constraints that prevent the employment site being used effectively, which could be evidenced by unfulfilled requirements from business, yet developers are not prepared to build premises at the prevailing market rents).”*
- **Stage 3: Windfall assessment** Not applicable as relates to housing only
- **Stage 4: Assessment review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of ‘gaps’ in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
 - Sectoral and employment forecasts and projections (labour demand)
 - Demographically derived assessments of future employment needs

(labour supply techniques)

- Analysis based on the past take-up of employment land and property and/or future property market requirements.

The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the study period, and an analysis of the likely ‘gaps’ in supply that need to be filled

- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in future Local Plan documents. The Study is prepared in line with this advice.

1.15 Table 1 shows how the Employment Land Study aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

| Stage 1 – Site / Broad Location Identification | |
|---|--|
| Step 1 – Determine assessment area and site size | Undertaken by Chorley and South Ribble Borough Councils and Preston City Council |
| Step 2 – Desktop review of existing information | Covered in Sections 2-9 |
| Step 3 – Call for sites / broad locations | To be completed within ongoing Local Plan update processes for the three authorities |
| Step 4 – Site / broad location survey | Covered in Sections 10, 11, 12 |
| Stage 2 – Site / Broad Location Assessment | |
| Step 5 – Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability | Covered in Section 10 and Appendices |
| Step 6 – Overcoming constraints | Covered in Section 10 and Appendices |
| Stage 3 – Windfall Assessment | |
| Step 10 – Determine housing / economic development potential of windfall sites (where justified) | N/A |
| Stage 4 – Assessment Review | |
| Step 11 – Review assessment and prepare draft trajectory; enough sites / broad locations? | Section 8 |
| Stage 5 – Final Evidence Base | |
| Step 12 – Evidence Base and monitoring | Employment Land Study produced by BE Group and monitoring undertaken by Chorley and South Ribble Borough Councils and Preston City Council |

Source: BE Group 2017

2.0 STRATEGIC CONTEXT

Introduction

- 2.1 This section focuses on national, regional and local reports and strategies that have a relevance to the allocation of employment land and premises.

National Policy/Strategies

National Planning Policy Framework – Department for Communities and Local Government (2012)

- 2.2 The NPPF sets out the Government's economic, environmental and social planning policies for England, articulating the Government's vision of sustainable development. It provides a framework for the production of local and neighbourhood plans.
- 2.3 The NPPF requires local authorities to set a clear economic vision and strategy based on an understanding of the existing business needs, likely changes in the market and any barriers to investment. This understanding should be achieved through working with the local business community, neighbouring local authorities and the Local Enterprise Partnership (LEP).
- 2.4 Paragraphs 18 to 22 of the NPPF establish that the Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth, and that significant weight should be placed on the need to support economic growth through the planning system. It sets out a requirement for local planning authorities to plan proactively to meet the development needs of businesses and support an economy fit for the 21st Century.
- 2.5 In drawing up local plans, the NPPF requires local authorities to:
- Set out a clear economic vision and strategy
 - Set criteria or identify strategic sites for local and inward investment
 - Support existing business sectors and where possible identify and plan for new or emerging sectors likely to locate in the area
 - Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries

- Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement
- Facilitate flexible working practices.

2.6 Paragraph 22 states that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

2.7 Paragraphs 160 and 161 set out that local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To do this they should work with Local Enterprise Partnerships, the business community, county and neighbouring authorities to understand business needs, likely changes in the market and barriers to investment. They should use their evidence base to assess the land and floorspace for economic development, including the quantitative and qualitative needs for all foreseeable types of economic activity and the existing and future supply of land.

Building Our Industrial Strategy – HM Government (2017)

2.8 Following the UK's decision to leave the European Union in June 2016, Government released an updated Industrial Strategy Green Paper as part of its post-Brexit plan. The stated purpose of the strategy is "*to improve living standards and economic growth by increasing productivity and driving growth across the whole country.*" This growth is framed on ten 'pillars' believed to be the most important to drive forward the industrial strategy:

- Science, research and innovation
- Skills
- Infrastructure
- Business growth and investment
- Procurement
- Trade and investment
- Affordable energy
- Sectoral policies
- Driving growth across the whole country

- Creating the right institutions to bring together sectors and places.

2.9 This final point is expanded upon within the Industrial Strategy as it states that “*the creation of a modern industrial strategy is the opportunity to ensure that we have the right institutions in place – at both national and local level – to identify emerging areas of strength, and develop policies and targeting investments to support them.*” Central Government “*will never have the information it needs to identify the opportunities that emerge in different areas...yet keys lessons from industrial policy in other countries include the need for consistency and patient effort and the right institutions to support development over the long term.*”

2.10 Many successful industrial clusters around the world share certain key features, including:

- *Local business and financial institutions* – including ‘Anchor’ tenants who play a key role in attracting skilled workers, or generating an entire supply chain for specific areas
- *Local leadership institutions* – including local authorities who can help to coordinate the different things that local industries require (e.g. planning decisions, transport, skills and investment in culture). Local Enterprise Partnerships also create strategic plans for wider areas and give businesses a direct role in shaping the future of their local communities
- *Interest groups and advocacy groups* – local business associations can play an important role in aggregating the interests of local business, advocating on its behalf to government, providing training and building networks to improve the flow of knowledge and contacts
- *Institutions that support innovation* – universities, Government and research council labs can contribute to the strength of local business clusters by attracting young skilled people; spinning out firms; and attracting research intensive businesses to locate in the area.

2.11 Building from this, the Strategy lists all actions currently under way. For example, Local Enterprise Partnerships have been established in all parts of England; Mayoral Combined Authorities have been established as part of Devolution Deals, with the first mayoral elections just completed; and business rate revenues are to be fully devolved to local authorities in England.

Northern Powerhouse Strategy – HM Government (2016)

- 2.12 The Central Lancashire economy sits within an area which is being termed ‘The Northern Powerhouse’ by Government. This is an initiative to try and boost investment in the North of England and rebalance the economy. The Powerhouse does not have absolute boundaries, but it is primarily focused on the regions of the North West, North East and Yorkshire and Humberside.
- 2.13 The Northern Powerhouse concept puts greater emphasis on attracting investment into the area which is also a target for increased transport spending. Transport for the North has been formed to examine the opportunities.
- 2.14 The Northern Powerhouse Independent Economic Review (2016) defines outcomes for the Northern Powerhouse, including:
- The generation of 850,000 new jobs by 2050 over the baseline position of 710,000 jobs which will be created in any event
 - That productivity will increase by 4 percent more than the baseline forecast
 - That GVA will be 15 percent higher.
- 2.15 The areas of growth that will help drive this change in performance are identified as advanced manufacturing, health innovation, digital and energy.
- 2.16 Government will continue to work with northern towns, counties, cities, LEPs, businesses, universities, charities and others to address the fundamental barriers to productivity that the North faces. Government will also confirm arrangements for the £400 million Northern Powerhouse Investment Fund which, in collaboration with the LEPs in the region and the British Business Bank, will invest in local smaller businesses. This will be supported by the European Regional Development Fund and European Investment Bank which, combined with the North East’s fund for Small and Medium-Sized Enterprises (SME’s), will facilitate over £500 million of investment in northern businesses in the coming years.
- 2.17 Government establishes this strategy as a starting point from which to consult and engage with local authorities, Local Enterprise Partnerships, businesses and others across the North to assess what more can be done to support the delivery of the Northern Powerhouse.

Lancashire LEP Area – Policy/Strategy

Strategic Economic Plan: A Growth Deal for the Arc of Prosperity and City Deal Implementation Plan 2015-2018 – Lancashire Enterprise Partnership (2014 and 2015)

- 2.18 The Strategic Economic Plan (SEP) has been produced by the Lancashire Enterprise Partnership (LEP) and identifies the key priorities and programmes for the county. All programmes can benefit from Growth Deal and, at present at least, European Structural and Investment Fund (ESIF) support from 2015/16 onwards.
- 2.19 Lancashire's Growth Deal, agreed in 2013, takes the vision, objectives and priorities of the SEP and sets out an integrated programme of interventions that the LEP believes can generate the step change required to move the local economy forward. These interventions can deliver:
- “50,000 new jobs
 - 40,000 new houses
 - £3 billion in additional economic activity, above the local trend rate.”
- 2.20 Signature programmes and projects within the Growth Deal include the “*development service for high value SMEs in the advanced manufacturing sector*” at the Samlesbury Enterprise Zone. The County Council has negotiated a £12.4 million loan from the Government's Local Infrastructure Fund to advance early works on the Enterprise Zone site at Samlesbury. Elsewhere, the Preston, South Ribble and Lancashire City Deal has established a £340 million Infrastructure and Delivery Programme and £100 million Investment Fund to help generate over 20,000 new jobs and deliver 17,420 new homes.

Central Lancashire – Policy/Strategy

Central Lancashire Local Development Framework, Adopted Core Strategy – Chorley Borough Council, Preston City Council, South Ribble Borough Council (2012)

- 2.21 The Core Strategy endorses the following Strategic Sites within Central Lancashire:
- Buckshaw Village – mixed use
 - Cuerden – employment
 - BAE Systems, Samlesbury – employment
 - Cottam – mixed use.

2.22 Growth locations are identified at Central Preston, North West Preston and land South of Penwortham and North of Farington. The Core Strategy also notes a large (54 ha, later refined to 40.6 ha) mixed use development at Leyland (Moss Side) Test Track.

2.23 The following policies in the Core Strategy are of direct relevance to employment land provision:

- *Policy 1: Locating Growth* notes that growth and investment will be concentrated on well located brownfield sites and the Strategic Location of Central Preston, the Key Service Centres of Chorley and Leyland and the other main urban areas in South Ribble, whilst protecting the character of suburban and rural areas
- *Policy 9: Economic Growth and Employment* identifies the requirement for **454 ha** of employment land between 2010 and 2026, in Central Lancashire. The net need, excluding the existing supply of 377 ha as at 2009, is for **77 ha**. By Borough, the need is:
 - *Chorley* – 112 ha Total Need, 21 ha additional to 2009 supply of 91 ha
 - *Preston* – 118.5 ha Total Need, 11.5 ha additional to 2009 supply of 107 ha
 - *South Ribble* – 223.5 ha Total Need, 44.5 ha additional to 2009 supply of 179 ha.
- Regional and Central Lancashire office developments will be in Preston City Centre, with more local office schemes in Chorley and Leyland town centres. Other major developments will be located in the Preston/South Ribble urban area and Leyland/Farington, with other significant developments for employment at Botany/Great Knowley, Preston East/Millennium City Park and Riversway. Mixed use developments will be encouraged in central and accessible locations including Leyland (Moss Side) Test Track and Lostock Hall Gasworks
- *Policy 10: Employment Premises and Sites* seeks to protect existing employment premises and sites for employment uses. This particularly relates to ‘Best Urban’ and ‘Good Urban’ sites. Proposals on other employment sites/premises for non B-Class uses will be considered against needs, the value of the site in meeting employment needs and merits of the proposal
- *Policy 11: Retail and Town Centre Uses and Business Based Tourism* identifies Preston as a City Centre, Chorley and Leyland as ‘Principal Town Centres’. Bamber Bridge, Clayton Green, Longton, Penwortham and Tardy Gate, and

those proposed at Buckshaw Village and Cottam are identified as District Centres. These will be the main locations for town centre uses, included uses for tourists and visitors.

Central Lancashire Controlling Re-Use of Employment Premises Supplementary Planning Document – Chorley Council, Preston City Council, South Ribble Borough Council (2012)

- 2.24 The purpose of this Supplementary Policy Document (SPD) is to define the Councils' approach to dealing with development proposals involving the re-use of existing employment premises and sites. The emphasis will be to retain all employment sites to support sustainable economic growth. Consideration will only be given to alternative uses where an applicant can clearly demonstrate that the criteria in the policy have been fully met.
- 2.25 The document identifies eight criteria against which decisions on reuse will be made, that:
- There will be no unacceptable reduction in the type, quality or quantity of employment land supply
 - The provision of the proposed use will have been surveyed and need for more of that uses clearly identified
 - The relative suitability of the site for employment and for the alternative use will be understood
 - Proposals must demonstrate that the alternative use would be better suited to the location of the site and its relationship to other uses than B-Class employment uses
 - The ability of the site ability to accommodate smaller scale B-Class employment requirements must not be compromised
 - A net improvement in amenity must be shown
 - Convincing evidence of lack of demand, through a rigorous and active 12 months marketing exercise, must be proved
 - An assessment of the viability of employment development, including re-use and redevelopment options, be undertaken.

Central Lancashire Rural Development Supplementary Planning Document – Chorley Council, Preston City Council, South Ribble Borough Council (2012)

- 2.26 The purpose of this Rural Development SPD is to set out the Councils' approach to development in the rural areas of Central Lancashire. The SPD clarifies the Councils'

support for specific initiatives to sustain and encourage appropriate growth in the rural economy, and aims to ensure that:

- *“Rural communities thrive as mixed communities where people young and old, on high and lower incomes are able to live in rural settlements*
- *Rural economic development is supported and encouraged within clearly defined parameters*
- *Development takes place in a way which helps places become more sustainable*
- *Existing services in rural areas are supported and maintained.”*

2.27 In terms of B-Class employment uses in rural areas, the SPD comments that: *“Employment development proposals should be conveniently located in relation to the surrounding road network, provide a safe access, be adequately serviced or can be serviced at a reasonable cost. Applicants seeking planning permission should also demonstrate that the proposed use would not be detrimental to local amenities and the use of neighbouring land.”* Re-use of buildings business, community or tourism purposes will usually be preferable to residential.

2.28 In terms of small business units, the policy view is that: *“The Councils will support the development of small business units in rural areas (mainly use class B1), including farm diversification enterprises, in buildings that are no longer required for their original purpose. This may also include business ‘hubs’ which encourage the use of shared space such as meeting rooms and offices. Noise impact assessments may be required for proposals for general industrial development (B2 use) or the storage and distribution of goods (B8 use) in certain circumstances... Where there is a small home-based business, the Councils will where appropriate consider sensitively designed applications for the extension of residential premises for appropriately scaled office or storage space to support existing home working.”*

2.29 The SPD defines Live/work units as *“a work space that is integrated with a dwelling unit occupied by the proprietor of the work space, with at least 50 percent of the floorspace being dedicated to the work unit. This type of development should have close access to classified roads, and space for parking/deliveries. Someone who lives in the residential part of the unit should be employed wholly or primarily in the workspace provided in the development.”*

Central Lancashire Economic Regeneration Strategy 2026 – Preston City

Council, Chorley Council, South Ribble Borough Council (2010)

- 2.30 The purpose of the Central Lancashire Economic Regeneration Strategy is to pull together the economic development strategies for the three authorities of South Ribble, Preston and Chorley within a Central Lancashire context, to deliver economic growth. This report is due to be refreshed during 2017.
- 2.31 Relevant detailed priority actions emerging from this strategy include ‘A1 – *Strategic Employment Sites Development*’. This encourages joint working to deliver the Strategic Sites. Activities include the sequencing of site delivery work to access funding, masterplanning, installation of services and the necessary infrastructure, which is tailored to the specific needs of different industries and sizes of company to attract investment.
- 2.32 Policy priority ‘A7 - *Growth of Key Sectors*’ aims to support and develop the identified growth sectors:
- Nuclear/ Energy
 - Advanced Manufacturing
 - Business and Professional Services
 - Specialist areas, which are suited to existing, transferrable skills and resources, including knowledge based industries; advanced recycling; green energy (gas, wind and water power); digital/creative industries and food and drink.

Central Lancashire Office Needs Assessment – Chorley Council, Preston City Council, South Ribble Borough Council (2006)

- 2.33 The Office Needs Assessment Study was commissioned to determine the office needs of the area in terms of future land provision up to 2021. As the study is now some 11 years old, and pre-dates the national recession and recovery, it is reviewed at a high level only. Its forecasts of growth in particular, with take up of 18, 438 sqm/year are unlikely to be relevant in the post-recession market.
- 2.34 The quantity of office supply in Central Lancashire, as of 2006, is detailed in Table 2.

Table 2 – Baseline Assessment of B1 Supply

| Area | Vacant Stock Actual 2006 | Committed as at 2006 | Residual Capacity in Sites | Less Assumed Minimum Vacant Stock (5%) | Potential Supply |
|---------|--------------------------|----------------------|----------------------------|--|------------------|
| Chorley | 6,459 | 13,711 | 96,436 | 5,830 | 110,776 |

| Area | Vacant Stock Actual 2006 | Committed as at 2006 | Residual Capacity in Sites | Less Assumed Minimum Vacant Stock (5%) | Potential Supply |
|---------------------------|--------------------------|----------------------|----------------------------|--|------------------|
| Preston | 30,683 | 57,069 | 75,392 | 8,157 | 154,987 |
| South Ribble | 8,016 | 50,763 | 65,784 | 6,228 | 118,335 |
| Central Lancashire | 45,158 | 121,543 | 237,612 | 20,216 | 384,097 |

Source: PCC, CBC, SRBC 2006

- 2.35 Table 2 shows there is a supply of almost 400,000 sqm. The majority of this, 40 percent, is in Preston, with South Ribble accounting for 32 percent and Chorley 28 percent. Chorley has the greatest residual capacity, whilst also possessing the lowest commitments and overall potential supply. Preston, followed by South Ribble, have the largest amount of commitments. The quality of local stock is assessed in Table 3. It shows a stock which is mostly attractive in market terms although it generally rates less well in sustainability and planning terms.

Table 3 – Qualitative Stock Appraisal

| | Market Attractiveness, percent | | Strategic Planning and Sustainability, percent | |
|---------------------------|--------------------------------|------------------------|--|------------------------|
| | Poor/Fair | Strong/ Very Strong | Poor/Fair | Strong/ Very Strong |
| Chorley | 37 | 63 | 44 | 56 |
| Preston | 26 | 74 | 47 | 53 |
| South Ribble | 33 | 67 | 56 | 44 |
| Central Lancashire | 32 | 68 | 48 | 52 |

Source: PCC, CBC, SRBC 2006

Chorley, Preston and South Ribble Employment Land Review to 2021 – Preston City Council, Chorley Council, South Ribble Borough Council (2009)

- 2.36 This Joint Employment Land Review (ELR) informed the subsequent Central Lancashire Core Strategy (discussed above). The study reviews Central Lancashire wide employment and property markets to 2026.
- 2.37 Central Lancashire's supply of employment land, including both allocated sites and commitments (sites under construction or with extant planning permission), was identified as totalling 425.9 ha. This was broken down as shown in Table 4.

Table 4 – Central Lancashire’s Employment Land Supply

| | Chorley (ha) | Preston (ha) | South Ribble (ha) | Central Lancashire Total (ha) |
|--|-------------------------|-------------------------|----------------------------------|--|
| Local Plan Employment Allocations (without Planning Permission) | 55.4 | 57.7 | 44.3 | 157.4 |
| Owner Specific Sites (without Planning Permission) – (of which 92 percent (142.96 ha) was BAE Samlesbury) | 0 | 0 | 154.3 | 154.3 |
| Commitments within Local Plan Employment Allocations | 23.0 | 44.9 | 36.1 | 104.0 |
| Commitments Outside of Local Plan Employment Allocations | 2.9 | 1.4 | 2.2 | 6.5 |
| Unallocated Sites without Planning Permission but with Potential Capacity to provide Additional Employment Development | 3.0 | 12.7 | 6.7 | 22.4 |
| <i>Less Pending Losses of Employment Land and Floorspace</i> | <i>-10.3</i> | <i>- 8.1</i> | <i>- 0.4</i> | <i>-18.7</i> |
| TOTAL | 74.0 | 108.6 | 243.19 | 425.9 |

Source: PCC, CBC, SRBC 2009

- 2.38 When owner specific sites, not available for use by other employers (including BAE Samlesbury), are excluded, and an allowance made for vacant premises, the supply reduces to **271.6 ha**.
- 2.39 Detailed ranking and assessment of all the sites was undertaken in the ELR. That extensive exercise is not repeated in this study, but relevant ranking/grading data for sites still available in 2016/17, has been considered as part of the review of the current employment land supply in Section 7.0 of this report.
- 2.40 Over the period 2001/02-2006/07 some 102 ha of employment land was taken up within Central Lancashire – an average of 17 ha/year. Up to 2005/06, the take up of employment land in Chorley was by far the weakest of the three council areas. However, during 2006/07, take-up in Chorley increased dramatically with 20.5 ha taken up for employment purposes, largely attributable to development of the Regional Investment Site at Buckshaw.
- 2.41 Unsurprisingly Preston had the highest take-up, although this has not been consistent. A peak take-up of 166 ha in 2003/04 and a net loss of employment land in 2005/06 has led to an average of 6.7 ha take-up per annum over the period.
- 2.42 South Ribble saw high take-up during the national growth years 2004-2006/07, following several years of limited delivery around the turn of the century. The

average annual take up rate for the Borough over this period was 5.78 ha/year.

2.43 The ELR's forecast future of need shown in Tables 5 to 8.

Table 5 – Central Lancashire Total Supply v Forecast Requirements to 2021, ha

| | Office (ha) | Industrial (ha) | Warehousing (ha) | Total (ha) |
|--|-------------|-----------------|------------------|------------|
| A. Gross Total Employment Land Supply | 113.7 | 180.9 | 131.3 | 425.9 |
| B. Net Total Employment Land Supply | 69.3 | 93.9 | 86.1 | 249.2 |
| C. Base Forecast Requirement 2007 – 2021 | 16.9 | -95.7 | 25.0 | -53.8 |
| Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C) | 96.8 | 276.6 | 106.3 | 479.7 |
| Surplus or Deficit (based on Net Total ELS) (i.e. B minus C) | 52.4 | 198.6 | 61.1 | 303.0 |

Source: PCC, CBC, SRBC 2009

Table 6 – Chorley Total Supply v Forecast Requirements to 2021, ha

| | Office (ha) | Industrial (ha) | Warehousing (ha) | Total (ha) |
|--|-------------|-----------------|------------------|------------|
| A. Gross Total Employment Land Supply | 21.0 | 29.3 | 23.8 | 74.1 |
| B. Net Total Employment Land Supply | 21.0 | 27.8 | 22.4 | 71.1 |
| C. Base Forecast Requirement 2007 – 2021 | 4.3 | -5.1 | 3.9 | 3.1 |
| Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C) | 16.7 | 34.4 | 19.9 | 71.0 |
| Surplus or Deficit (based on Net Total ELS) (i.e. B minus C) | 16.7 | 32.9 | 18.5 | 68.0 |

Source: PCC, CBC, SRBC 2009

Table 7 – Preston Total Supply v Forecast Requirements to 2021, ha

| | Office (ha) | Industrial (ha) | Warehousing (ha) | Total (ha) |
|--|-------------|-----------------|------------------|------------|
| A. Gross Total Employment Land Supply | 23.2 | 40.7 | 44.7 | 108.6 |
| B. Net Total Employment Land Supply | 19.6 | 34.6 | 41.8 | 95.9 |
| C. Base Forecast Requirement 2007 – 2021 | 7.5 | -36.6 | 13.6 | -15.5 |

| | Office (ha) | Industrial (ha) | Warehousing (ha) | Total (ha) |
|--|-------------|-----------------|------------------|------------|
| Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C) | 15.7 | 77.3 | 31.1 | 124.1 |
| Surplus or Deficit (based on Net Total ELS) (i.e. B minus C) | 12.1 | 71.2 | 28.2 | 111.4 |

Source: PCC, CBC, SRBC 2009

Table 8 – South Ribble Total Supply v Forecast Requirements to 2021, ha

| | Office (ha) | Industrial (ha) | Warehousing (ha) | Total (ha) |
|--|-------------|-----------------|------------------|------------|
| A. Gross Total Employment Land Supply | 69.55 | 110.85 | 62.79 | 243.19 |
| B. Net Total Employment Land Supply | 28.74 | 31.48 | 21.99 | 82.21 |
| C. Base Forecast Requirement 2007 – 2021 | 5.10 | -54.00 | 7.05 | -41.40 |
| Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C) | 64.45 | 164.85 | 55.29 | 284.59 |
| Surplus or Deficit (based on Net Total ELS) (i.e. B minus C) | 23.64 | 85.48 | 14.49 | 123.61 |

Source: PCC, CBC, SRBC 2009

Central Lancashire Employment Skills Supplementary Planning Document – Preston City Council, Chorley Council, South Ribble Borough Council (2017)

- 2.44 Chorley, Preston and South Ribble Councils' wish see additional benefits (known as social value) incorporated into their housing and other development opportunities. Social value is defined as *“the additional economic, social and environmental benefits that can be created when the Council purchases a good or a service from an outside organisation, above and beyond the value of that good or service”*. Integrating social value at the planning stage of a project, can result in significant 'added value' benefits to residents, particularly for employment and skills.
- 2.45 This SPD introduces Employment Skills Statements as a material consideration in determining planning applications. The objectives of this SPD are to:
- *“Increase employment opportunities by helping local businesses to improve, grow and take on more staff*
 - *Help businesses to find suitable staff and suppliers, especially local ones*
 - *Improve the skills of local people to enable them to take advantage of the resulting employment opportunities*
 - *Help businesses already located in Central Lancashire to grow and attract*

new businesses into the area.”

- 2.46 Employment and Skills Statements will be required to be submitted with the planning applications (except for outline applications) which exceed 1,000 sqm of commercial floorspace (B-Class uses, retail and A3-A5 hot food) or 30 dwellings in a housing scheme. There may be occasions when these uses are developed jointly as part of one application and if the cumulative floorspace exceeds 1,000 sqm a statement will be required.
- 2.47 Statements can be tailored to ensure the right skills and employment opportunities are provided at the right time to benefit both the developer and local population and cover areas such as work experience/links to schools/colleges/universities, apprenticeships, in-house and external workplace training and community based projects.

Local – Chorley

Chorley Local Plan 2012 – 2026: Site Allocations and Development Management Policies Development Plan Document – Chorley Council (2015)

- 2.48 The Chorley Local Plan forms part of the statutory Development Plan for Chorley, and has two roles. The first is to identify the scale of development required in each settlement and allocate sites to meet that requirement development over a 15-year period. The second is to identify key local issues and provide a set of policies to manage change which will be used by decision makers to determine planning applications.
- 2.49 Policy EP1 identifies a land requirement of 112 ha over 2010-2026, reducing to 106.99 ha when completions over 2010-2012 are accounted for. To meet this, need a land supply of 100.61 ha is identified. This includes 88.74 ha on existing and proposed allocated sites, including:
- 45.58 ha in nine sites around Chorley Town
 - 26.96 ha in three sites at Buckshaw Village
 - 0.60 ha on one site in Adlington
 - 15.60 ha on one site in Clayton-Le-Woods
 - 0.60 ha on one site in Mawdesley.
- 2.50 Key is an area comprising 32.5 ha to the east of Junction 8, M61, which includes two distinct sites, Botany Bay and Great Knowley, that are divided by the Leeds and

Liverpool Canal. Policy EP2 sets out the development criteria for this area, which includes 20 ha for employment use alongside some 200 homes and mixed leisure and retail options. Considering the mix of uses proposed, the site's natural features and relationship to surrounding uses, development is likely to come forward in several distinct phases, and the Council requires a Masterplan for delivery.

- 2.51 Policy EP3 sets out the development criteria for business and industrial development. It states that development must be of a high standard of design, layout and landscaping, relative to the location and scale of the development. Landscaping, design and security fencing should ensure the development improves the attractiveness of the employment areas and adequately screens and enhances the appearance of the area.
- 2.52 'Policy EP4: Employment Development in Residential Areas' states that new small-scale employment development will be permitted in residential areas providing there will be no detriment to the amenity of the area in terms of scale, character, noise, nuisance, disturbance, environment and car parking.

Chorley Town Centre Masterplan – Stage 3 Report – Chorley Council (2013)

- 2.53 The Chorley Town Centre Masterplan “sets out the future development of Chorley Town Centre, providing a deliverable framework for investment at key development sites to ensure the viability and vitality of Chorley Town Centre going forward.” The masterplan is therefore founded upon some major key principles. “Most critically the masterplan is designed to support business by stimulating economic activity without which any plan will be rendered meaningless.”
- 2.54 Development opportunities are distilled into three key sites:
- *South Market Street / Fleet Street* – The total site area measures in the region of 3.6 ha and is considered critical to the realisation of the plan. The area has a complex ownership schedule with Chorley Council owning a large proportion of the central developable sites. There is an opportunity to improve the weak retail offer of southern Market Street, with the purpose of pushing the retail core northwards
 - *Civic Quarter* – The site offers an opportunity to develop a commercial development block suitable for a range of town centre uses, extending the existing Civic Quarter. The site includes the Gala Bingo block (the footprint of which measures 3,927 sqm) and its immediate environs. This falls under the

ownership of Chorley Council. However, there was then a long lease interest held by Northern Trust as well as many short leasehold interests. The block can provide circa 4,500 – 6,000 sqm, in a medium density scheme.

- *Flat Iron Car Park and Environs* – The site sits at the heart of the town centre, measuring approximately 0.8 ha. Most of the site falls under the ownership of Chorley Borough Council, with single ownerships including Trust Inns (59 Union Street) at No's 4 Ltd (61 Union Street). There is an existing covenant on the Flat Iron Car Park, associated with the Booth's development, which stipulates that 130 car parking spaces must be kept available to facilitate shoppers.

2.55 This report forms part of the wider Chorley Local Plan and the three sites fall within the Chorley Town Centre boundary. Chorley Local Plan Policy EP5 defines several sites within Chorley Town Centre for potential retail development, including:

- EP 5.1 – Flat Iron Car Park
- EP 5.2 – Bolton Street / Pall Mall
- EP 5.3 – 5-9 Gillibrand Street
- EP 5.4 – High Street / Cleveland Street.

Chorley Economic Development Strategy – Chorley Council (2014)

2.56 Chorley's economic vision, detailed through the Council's Economic Development Strategy is to "*capitalise on Chorley's location in order to be the place of choice in the North West to do business.*" This vision is focused not only on attracting employers to key employment sites, but also to allow residents a greater opportunity to gain well paid employment locally. This is to be delivered through five Vision Points:

- *"To promote and increase inward investment in Chorley through maximising best of available employment land and buildings in the Borough*
- *To provide support for new and existing businesses;*
- *To create a vibrant town centre that attracts people from both the local community and visitors in the day and evening, for shopping, eating and entertainment;*
- *Education, training and skills development;*
- *Reducing the gap in our most deprived communities."*

2.57 Relevant to this study is Vision Point One. Chorley has several 'outstanding' employment sites, which have been key to supporting economic growth in the Borough over recent years. To allow investment and development to continue "*the*

Council aims to take a hands-on approach by buying land and developing units or by working with partners to do the same. Developing just half of these sites has the potential to provide over 3,000 jobs and it is the council's ambition to facilitate 50 percent of these employment sites by 2022."

2.58 Actions associated with Vision Point One are set out in Table 9.

Table 9 – Vision Point One Actions

| Long Term Outcome |
|---|
| To promote and increase inward investment in Chorley through maximising best use of available employment land and buildings in the borough in order to support economic growth and provide a mix of well paid, high and low skilled jobs. |
| Key Actions (2014/15 – 2015/16) |
| <ol style="list-style-type: none"> 1. Work with developers, land owners and the LEP to bring forward key employment sites 2. Work with key public-sector partners to align asset plans to ensure a future supply of employment land 3. Deliver the Inward Investment Action Plan and 'Choose Chorley' campaign; including: Develop positive relationships with key partners including the LEP, Enterprise Zones, neighbouring authorities and the UKTi Develop sectoral propositions and start to implement a plan targeting inward investment of specific sectors detailed above Build relationships with target intermediaries. 4. Investigate the feasibility of creating an additional M6 Junction for Chorley between J27 and J28 5. Investigate the feasibility of other road infrastructure improvement; such as Botany Bay employment site 6. Monitor progress of the HS2 programme and establish links and respond to consultations as required 7. Progress opportunities around developing a digital health park in Chorley. |
| Success Measures |
| <p>The number/size of employment sites being brought forward (Target 50 percent of current sites by 2022)</p> <p>Increase business rate based by 3 percent</p> <p>Increase in the number of jobs created</p> <p>Increase in the median workplace earnings</p> <p>Increase in the amount of investment brought into the borough via council supported services</p> <p>Increase in the jobs density ratio within the borough</p> <p>Increase in the number of businesses re-locating to Chorley.</p> |

Source: Chorley Council, 2014

Local – Preston

Preston Local Plan 2012 – 2026 – Preston City Council (2015)

2.59 The Preston Local Plan forms part of the statutory Development Plan for Preston,

alongside a separate City Centre Plan (discussed below).

- 2.60 In terms of the growth hierarchy, Cottam is a Strategic Site where growth and investment will be focussed. The site comprises mostly greenfield land to the north west of Preston's City Centre, referred to as Cottam Hall, along with the derelict urban brownfield Cottam Brickworks site. Cottam Hall is already partially built-out, with the remaining land to be redeveloped for residential and community uses. The Brickworks site has planning permission for a mix of uses, including employment.
- 2.61 Preston's Central Business District (CBD) is expected to provide high quality modern office development and a range of complementary uses. Allied to the CBD proposals is the continued expansion of the University of Central Lancashire and the linked expansion of knowledge based employment sectors within Central Preston.
- 2.62 '*Policy EP1 – Employment Site Allocations*' identifies a land requirement of 118.5 ha over 2010-2026, reducing to 96.10 ha when completions over 2010-2012 are accounted for. To meet this need, Policy EP1 lists the 11 sites comprising 99.52 ha that are allocated and protected for business, general industrial or storage and distribution uses in the period 2014-2026. Two proposed new allocations – Preston East Junction 31A M6 and 11 Roman Road Farm – require additional work in terms of a masterplan or development brief, and two – Former Whittingham Hospital and Land North of Eastway, formerly Broughton Business Park – have additional land allocated for housing as part of a mixed-use development
- 2.63 '*Policy EP2 – Protection of Existing Employment Areas*' notes that existing employment premises, and sites last used for employment will be retained, in keeping with Central Lancashire Core Strategy Policy 10: Employment Premises and Sites. Policy 10 seeks to protect employment sites for employment use and only release employment sites for housing where proposals are supported by a viability assessment and, for housing proposals, a marketing period of 12 months.

Preston City Centre Plan Submission Version – Preston City Council (2015)

- 2.64 The City Centre Plan sits within a planning framework for Preston overarched by the Central Lancashire Core Strategy. Section Two of the City Centre Plan focuses on the economic vitality of Preston City Centre.

- 2.65 The City Centre already offers a wide range of office provision. However, much is ageing, of sub-prime quality and suffers from high vacancy levels. There has been no significant investment in new office development within the City Centre for some time, which means that the City Centre struggles to compete with out-of-town developments.
- 2.66 In accordance with the Local Plan and Central Lancashire Core Strategy, new office development should be located within the City Centre, unless it can be demonstrated that it is not viable. As such, the plan promotes and encourages new office development in appropriate locations across the City Centre.
- 2.67 The City Centre Plan highlights Corporation Street and City Centre North Opportunity Areas as ideal locations to deliver modern, high quality and sustainable offices. Furthermore, underused properties in Winckley Square can be re-used for office use, to support the existing cluster of professional business activity here. The Plan also promotes creative and commercial industries, for example research and development business use in the Corporation Street Opportunity Area, and small-scale general industrial business use in the Stoneygate Opportunity Area.
- 2.68 Section Three provides more development advice for the City Centre Opportunity Areas of Corporation Street and Winckley Square. The Council envisage the Corporation Street area to be strongly affiliated with the University of Central Lancashire and therefore best placed to create the opportunities for the integration of the University with the City Centre. The Core Strategy also acknowledges that this part of the City Centre is well placed to deliver high quality, sustainable office accommodation, including specialist knowledge-based industries.
- 2.69 This area is focused on the corridor created by Corporation Street and the developable opportunities branching off it. It benefits from the improved connectivity created by the Fishergate Central Gateway Project. *Policy OP1 – Corporation Street* states that proposals for new, high-quality, mixed-use development will be permitted. In particular, proposals containing any one, or mixture, of the primary office, hotel, leisure or A1 retail uses (in the Primary Shopping Area) will be encouraged. Mixed-use proposals will be encouraged where they contain at least one these primary uses, alongside A1-A5 retail and/or housing.
- 2.70 Proposals for student accommodation here will be acceptable where they form part

of a mixed-use development and subject to the housing criteria set out in Local Plan Policy HS6. In order to enhance the pedestrian environment and provide a strong identity to the area, all proposals must accommodate enhancements to public spaces, and all proposals fronting Ringway, Corporation Street and Friargate Brow must contain active ground floor frontages.

- 2.71 In *Policy OP2 – Winckley Square*, it is noted that the Council intends to work with the Winckley Square Community Interest Company to encourage development proposals that conserve and enhance the general appearance of the area as well as improve the public realm, pedestrian permeability and ensure the appropriate modernisation of accommodation.
- 2.72 This will, in turn, support the Winckley Square Townscape Heritage Initiative and, where necessary, the Council will use its statutory powers to secure the refurbishment and repair of designated heritage assets, particularly where those assets are identified as being ‘at risk’. The Council will actively pursue the refurbishment and conversion of the former St Joseph’s Orphanage and College House (28 Winckley Square), both Grade II listed, to bring them back to active use.
- 2.73 Proposals, including mixed-use schemes, within the designated Winckley Square ‘Inner Zone’, will only be permitted where they comprise restaurants, B1(a) offices, hotels, housing or non-residential institution uses. Elsewhere in this ‘Inner Zone’, proposals for Houses in Multiple Occupation will be resisted. Other proposals will however be permitted where they both fall into any of the uses appropriate within the ‘Inner Zone’ and offer A1-A5 retail and/or assembly and leisure.

Local – South Ribble

Local Plan 2012-2026 – South Ribble Borough Council (2015)

- 2.74 This adopted Local Plan provides development management policies for the Borough, reflecting the Central Lancashire Core Strategy. Relevant policies include:
- *‘Policy B1 – Existing Built-Up Areas’* notes that within the existing built-up areas, proposals for the re-use of undeveloped and unused land and buildings, or for redevelopment, will be permitted subject to consideration of access, amenity and impact

- *'Policy B2 – Village Development'* states that land on the periphery of Much Hoole, New Longton, Coupe Green and Mellor Brook is safeguarded to meet local needs which could include employment uses
- Policies B3-B5 set out the following limitations on new development, re-development or changes of use within South Ribble's main mixed-use sites:
 - *'Policy B3 – Commercial and Employment Site at South Rings Business Park, Bamber Bridge'*. Permitted for: Offices, non-food retail, employment, leisure, recreation and tourism facilities
 - *'Policy B4 – Commercial and Employment Site at Cuerden Way, Bamber Bridge'*. Permitted for: offices, food retail, employment, leisure, recreation and tourism facilities
 - *'Policy B5 – The Capitol Centre, Walton-le-Dale'*. Permitted for: non-food retail, leisure, recreation and tourism facilities, subject to considerations of impact both on the current area offer and on surrounding centres.

2.75 The Leyland (Moss Side) Test Track covers an area of 40.6 ha and has the potential to provide a comprehensive development of both residential and employment uses (including local services) subject to agreed masterplanning, phasing, implementation programme, design code and infrastructure scheduling (Policy C2). These same requirements are made for the 65 ha Cuerden Strategic Site (Policy C4), which is to be developed for high quality employment uses including commercial, industrial, retail and leisure. Planning permission will be granted for development of the Cuerden Strategic Site subject to the submission of:

- *"An agreed Masterplan for the comprehensive development of the site, to provide a strategic employment site, to include employment, industrial and Green infrastructure uses*
- *A phasing and infrastructure delivery schedule*
- *An agreed programme of implementation in accordance with the Masterplan and agreed design code. Alternative uses, such as retail, leisure and housing may be appropriate where it can be demonstrated that they help deliver employment uses on this strategic site..."*

2.76 Any alternative enabling development will be limited to a scale which is demonstrated to be necessary to fund essential infrastructure and which will not prejudice the delivery of the main employment uses. Any proposed main town centre uses must satisfy the sequential and impact tests set out in the NPPF, and local/Central

Lancashire policy.

- 2.77 *'Policy C5 – BAE Systems, Samlesbury'* notes progress on the Enterprise Zone to date. An agreed Masterplan will be produced as a key part of the overall delivery of the Enterprise Zone.
- 2.78 *'Policy E1 – Allocation of Employment Land'* proposes a supply of 35.4 ha. A further 118 ha of employment land is also provided for through Policies C4 and C5 – Major Development Sites, at Cuerden and BAE Systems, Samlesbury. The Council has therefore allocated more land than is required by the Core Strategy, however, a large proportion of the new employment allocation is accounted for within the Major Development Sites, which are of regional importance, and will contribute towards the wider employment land supply of Central Lancashire and the North West. The Enterprise Zone will also contribute to national employment demands in the relevant sectors.
- 2.79 *'Policy E2 – Protection of Employment Areas and Sites'* protects 21 developed employment areas for B1/B2/B8 uses. Collectively these provide 349.5 ha of mostly developed employment land in the Borough.

Our Recipe for Economic Success: South Ribble Economic Regeneration Strategy 2018 – South Ribble Economic Partnership (2009)

- 2.80 The South Ribble Economic Regeneration Strategy provides a plan for economic growth over the period to 2018. A wide range of priority actions are put forward in the Strategy. However, only three, under the heading 'Space to Grow Facilities' are of direct relevance to this study:
- Work with partners to create new workspace in flexible locations to meet lifestyle and sectoral demands. Develop new retail and office premises to attract businesses into the Borough. Bring the Cuerden Regional Investment (Strategic) Site forward to deliver new jobs in target employment sectors, which are accessible to local areas of higher worklessness
 - Create new employment locations and premises across the Borough with suitable locations and characteristics to deliver growth in SMEs and the target employment sectors
 - Support the development of workspace in rural areas to grow the local economy, particularly for SMEs.

- 2.81 In addition to these points, the Strategy also highlights three initiatives in order to support these priority actions. These new initiatives are proposed to make South Ribble “*realise its aim of becoming an Enterprise Engine.*”
- Enterprise Incubators – there is a need for relatively small, reasonably priced new business workspaces, offered on flexible lease terms and with business support facilities on-site
 - SRBC Services to Business – given that many smaller businesses do not have sufficient staff to monitor human resources, data protection, health & safety and finance areas, a ‘knowledge transfer’ project for South Ribble will be explored.

Employment Land and Property Study – South Ribble Borough Council (2015)

- 2.82 This study, undertaken by BE Group, study was commissioned to “*provide the Council with a better understanding of the economy of the Borough, the current stock of commercial property and how the required future supply of commercial property can be delivered to promote economic growth.*”
- 2.83 The study formed a predecessor to this Central Lancashire wide Employment Land Study. Its conclusions can be summarised as:
- *Market Demand* - The local market appears to require industrial units of up to 300 sqm while demand for workshops of less than 100 sqm appears particularly healthy. Freehold and speculative demand is in evidence here, in locations including Matrix Park, Buckshaw Village and South Rings, Cuerden. Local office demand is for suites of up to 100 sqm, extending up to 500 sqm. Leyland is identified as a good source of budget space. Demand for larger offices is less clear. Certainly, experience at Matrix Park, Buckshaw Village, Leyland and Sceptre Way, Bamber Bridge has been positive and both locations have attracted inward investment from large service sector businesses and for HQ offices
 - *Sectoral Demand* – Economic research identified several potential growth sectors for South Ribble. These include the seven priority areas set out in the LEP’s Strategic Economic Plan which are seen as key drivers in the future economy of the area (see Table 10)
 - *The Impact of City Deal* – The growth scenarios undertaken in this report look at a baseline position today using Oxford Economics forecasts. However, these are considered to be conservative, delivering a net increase of 4,900 jobs from 2014 – 2026. Thus one approach taken is to increase these figures across all sectors by 25 per cent. This adjusted baseline provides for a net

increase overall of 6,400 jobs. However, the baseline adjustment still does not account for the anticipated growth expected from City Deal. The aspirational scenario takes those growth sectors and boosts job creation to provide an overall increase of 10,400 jobs. That Growth will be focused in the Construction, logistics and administration and service sectors and generates land requirements of between 11.47 ha and 34.32 ha. For take-up scenarios, demand ranges from some 44 ha overall to 32 ha if anomalous years are excluded

- *Land and Premises Supply* — South Ribble’s current land supply appears able to meet projected needs for relevant manufacturing sectors (advanced manufacturing, automotive, aerospace). Micro-small business space is immediately available at Matrix Park, Buckshaw Village and South Rings, Cuerden. Little is immediately available to meet the needs of larger businesses but the medium-term delivery of B1(c)/B2/B8 premises is likely at Leyland (Moss Side) Test Track. In terms of local transportation and storage, distinct from strategic needs, some 11-12 ha is required. Small options for this could be provided at South Rings in the short term (Central Plot (6000)) and in the medium term modest provision is also likely at Leyland (Moss Side) Test Track. In the long term however, there will be a degree of dependence on Farington Hall Estate, West of Lancashire Business Park, Farington as the local site large enough to accommodate a strong mix of industrial and warehousing options. Research suggests that 14.53 ha is required for uses that primarily operate from offices. At present however, only 1.73 ha of relatively secure (likely) office supply is identified at Pickerings Farm. Kellet Lane, Bamber Bridge could provide 4.58 ha of B1(a) land but delivery here is only likely later in the Plan period and would be heavily dependent on securing a viable access. However, larger offices are also likely at the Cuerden Strategic Site, as are larger logistics options.

Table 10 – Identified Growth Sectors

| Sector | Comments |
|--------------|--|
| Construction | <ul style="list-style-type: none"> • Construction employment already dominates the sectoral employment profile, accounting for 20 percent of total employment (11,200 people). • This sector is significantly overrepresented locally, accounting for 20 percent of employment in South Ribble against 4 percent nationally • Growth is driven by employment in the civil engineering subsector, which has 8,700 employees and has experienced growth of 74 |

| Sector | Comments |
|--------------------------------|--|
| | <p>percent over the last five years</p> <ul style="list-style-type: none"> The Borough includes an existing critical mass of large employers including Conlon, Eric Wright Group, C&W Berry |
| Information and Communications | <ul style="list-style-type: none"> The information and communications and administrative and support sectors experienced growth over the last five years and make a significant contribution to South Ribble's employment base |
| Administrative and Support | |
| Energy | <ul style="list-style-type: none"> <i>A LEP Priority Sector</i> There are 13,800 people in employment in the energy sector in South Ribble, accounting 26 percent of sectoral employment in the LEP area The sector has grown by 39 percent in the borough over the 2009 – 2013 period (+3,900 jobs) A critical mass of local companies already exists including Global Renewables, Green Technologies and Solutions, North West Projects Stakeholders do however raise concerns about growth prospects in the oil and gas sector given ongoing market volatility Shale gas remains a future growth prospect in Lancashire, but the full benefits of this sector are difficult to measure given ongoing political and environmental uncertainties. |
| Advanced manufacturing | <ul style="list-style-type: none"> <i>A LEP Priority Sector</i> Advanced manufacturing is highly represented in South Ribble with 3,300 employees accounting for 11 percent of the LEPs total advanced manufacturing employment. Whilst sectoral employment across the LEP area and nationally has declined since 2009, South Ribble has experienced a net employment increase in the sector (+300 jobs) Key manufacturing companies based in South Ribble include Leyland Trucks, Torotrack and Clean Air Power The Samlesbury Enterprise Zone has a focus on advanced manufacturing which offers scope for growth although full realisation of the scale of possible growth remains some years away |
| Creative and Digital | <ul style="list-style-type: none"> <i>A LEP Priority Sector</i> A growing sector locally with an additional 800 people (64 percent) in employment in the sector between 2009 and 2013. The sector remains underrepresented in South Ribble, as it is across the LEP and the region, compared to the national average. |
| Aerospace | <ul style="list-style-type: none"> <i>A LEP Priority Sector</i> A clear specialism in South Ribble given the presence of BAE Systems at Samlesbury Statistical estimates of the employment benefits of Samlesbury Aerodrome to South Ribble and Central Lancashire are always likely to fall short given that much of the BAE plant, which employs 4,000, falls within Ribble Valley Past research, undertaken for BAE Systems established GVA per employee of £76,000/year, this gives the plant a total GVA benefit of £304 million to its employment catchment Samlesbury will remain the main BAE aircraft manufacturing facility. Warton, by comparison, will be a focus for flight testing and engineering development BAE has an established process for bringing businesses onto its |

| Sector | Comments |
|-----------------------|---|
| | <p>supply chain</p> <ul style="list-style-type: none"> • BAE feel there is an opportunity to expand the raw materials supply and compound manufacture elements of its supply chain locally, elements not well catered for in Central Lancashire at present • The Enterprise Zone will increase the number of aerospace businesses in the borough although marketing for this land has not yet begun and the current level of market demand remains confidential • However, local authority areas surrounding the Enterprise Zone also expect to benefit from companies which wish to locate close to BAE but are ineligible to be within the Zone itself. |
| Transport and Storage | <ul style="list-style-type: none"> • A growth industry nationally and regionally • The growth of the Port of Liverpool is expected to generate some 400-500 ha of further land needs which cannot be readily met in the immediate Port catchment area • The regional supply of B8 land is reducing, while South Ribble now has strategic sites at Cuerden and Samlesbury • Central Lancashire is strategically well placed for distribution businesses seeking to serve a broad catchment of North Wales, Northern England and Scotland • The main alternative logistics location at North East Preston is constrained in terms of its motorway access |

Source: SRBC, 2015

Summary

2.84 The Preston, South Ribble and Lancashire City Deal has established a £340 million Infrastructure and Delivery Programme and £100 million Investment Fund to help generate over 20,000 new jobs and deliver 17,420 new homes.

2.85 The Central Lancashire Core Strategy identifies four Strategic Sites in Central Lancashire:

- Buckshaw Village – mixed use
- Cuerden – employment
- BAE Systems, Samlesbury – employment.
- Cottam – mixed use.

2.86 Policy 9 identifies the requirement for 454 ha of employment land between 2010 and 2026, in Central Lancashire. The net need, excluding the existing supply of 377 ha as at 2009, is for 77 ha. By Borough, the need is:

- *Chorley* – 112 ha Total Need, 21 ha additional to 2009 supply of 91 ha
- *Preston* – 118.5 ha Total Need, 11.5 ha additional to 2009 supply of 107 ha
- *South Ribble* – 223.5 ha Total Need, 44.5 ha additional to 2009 supply of 179 ha.

- 2.87 Regional and Central Lancashire office developments will be located in Preston City Centre, with more local office schemes in Chorley and Leyland town centres. Other major developments will be located in the Preston/South Ribble urban area and Leyland/Farington, with regionally significant schemes at the Strategic Sites. Mixed use developments will be encouraged in central and accessible locations including Leyland (Moss Side) Test Track and Lostock Hall Gasworks
- 2.88 The Chorley, Preston and South Ribble Employment Land Review to 2021 (2009) forecasts that Central Lancashire will need 69.3 ha of office land, mostly in Preston and South Ribble, and 25.0 ha of warehousing, again focused in Preston followed by South Ribble. In terms of industrial land, a reduction in baseline need is forecast – minus 95.7 ha. Thus, the overall requirement is for 53.8 ha less land than at present.
- 2.89 The adopted local plans identify the following land supplies:
- *Chorley* – 88.74 ha focused around Chorley Town and Buckshaw Village and including significant developments for employment land at Botany Bay/Great Knowley
 - *Preston* – 99.52 ha focused in North East Preston
 - *South Ribble* – A local employment land supply of 35.4 ha from 2010/11 to 2025/26. A further 118 ha of strategic employment land is also provided at Cuerden and BAE Systems, Samlesbury.
- 2.90 The Preston City Plan identifies Corporation Street and Winckley Square as key City Centre growth areas, particularly in terms of B1(a) offices.

3.0 ECONOMIC CONTEXT ASSESSMENT

Introduction

- 3.1 This section provides a summary profile of the prevailing social and economic conditions in Central Lancashire. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth. It also provides an important context for understanding economic demand/need, having regard to the wider regional and national economies.
- 3.2 This section therefore considers the size of the economy, where the businesses are, and what type of businesses they are. By appreciating these aspects, it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together several existing data sources. It also uses demographic data to build the picture, given that there are no readily available answers to some of the key questions included within this section.
- 3.3 It should be noted that commuting patterns are considered separately in Section 7.0, where they relate to calculations of the Functional Economic Market Area.

Economic Assessment – Population and Labour Market

- 3.4 Central Lancashire had a population of 366,300 in mid-year 2016. 38.7 percent of this was in the Preston local authority area.

Table 11 – Population Change 2006-2016

| Local Authority | 2006 mid-year population | 2016 mid-year population | Population change | Percentage change |
|--------------------|--------------------------|--------------------------|-------------------|-------------------|
| England | 50,965,200 | 55,268,100 | 4,302,900 | 8.4 |
| North West | 6,901,600 | 7,219,600 | 318,000 | 4.6 |
| Lancashire LEP | 1,446,000 | 1,485,000 | 39,000 | 2.7 |
| Central Lancashire | 348,100 | 366,300 | 18,200 | 5.2 |
| Chorley | 103,800 | 114,400 | 10,600 | 10.2 |
| Preston | 137,800 | 141,800 | 4,000 | 2.9 |
| South Ribble | 106,500 | 110,100 | 3,600 | 3.4 |

Source: Mid-Year Population Estimates, 2016

- 3.5 As Table 11 shows, Central Lancashire has seen a 5.2 percent population growth between 2005 and 2015, with Chorley seeing the greatest growth at 10.2 percent – higher than the growth seen across the North West (4.6 percent) and England (8.4

percent). All three local authority areas saw population growth above the Lancashire average of 2.7 percent.

3.6 Tables 12 and 13 provide age breakdowns for both Central Lancashire and the three constituent local authorities. The tables show that Central Lancashire generally follows the same age breakdown as the North West and England, with the largest proportion of people being in the 35-49 years (20 percent) and the smallest proportion being those over 75 years. The three authorities generally follow wider trends apart from Preston, which has a higher proportion of people aged 15-24 and a lower proportion of people over 65. In part, this will reflect the City's student population, primarily linked to the University of Central Lancashire, along with an element of recent migration.

Table 12 – Age Breakdown – Sub Regional

| Age | Central Lancashire | | Lancashire LEP | | North West | | England | |
|--------------|--------------------|--------------|------------------|--------------|------------------|--------------|-------------------|--------------|
| | No. | Percent | No. | Percent | No. | Percent | No. | Percent |
| Under 15 | 64,800 | 17.7 | 262,300 | 17.6 | 1,288,100 | 17.8 | 9,927,600 | 18.0 |
| 15-24 | 46,600 | 12.7 | 184,100 | 12.4 | 897,000 | 12.4 | 6,739,400 | 12.2 |
| 25-34 | 47,700 | 13.0 | 179,400 | 12.1 | 959,200 | 13.3 | 7,561,200 | 13.7 |
| 35-49 | 72,300 | 19.8 | 279,500 | 18.9 | 1,383,500 | 19.2 | 10,975,400 | 19.8 |
| 50-64 | 69,100 | 18.9 | 288,400 | 19.4 | 1,369,900 | 19.0 | 10,181,800 | 18.4 |
| 65-74 | 37,000 | 10.1 | 162,400 | 10.9 | 732,300 | 10.1 | 5,413,400 | 9.8 |
| 75+ | 28,500 | 7.8 | 129,100 | 8.7 | 589,700 | 8.2 | 4,469,500 | 8.0 |
| Total | 366,300 | 100.0 | 1,485,000 | 100.0 | 7,219,600 | 100.0 | 55,268,100 | 100.0 |

Source: Mid-Year Population Estimates, 2016

Table 13 – Age Breakdown – Local Authority Area

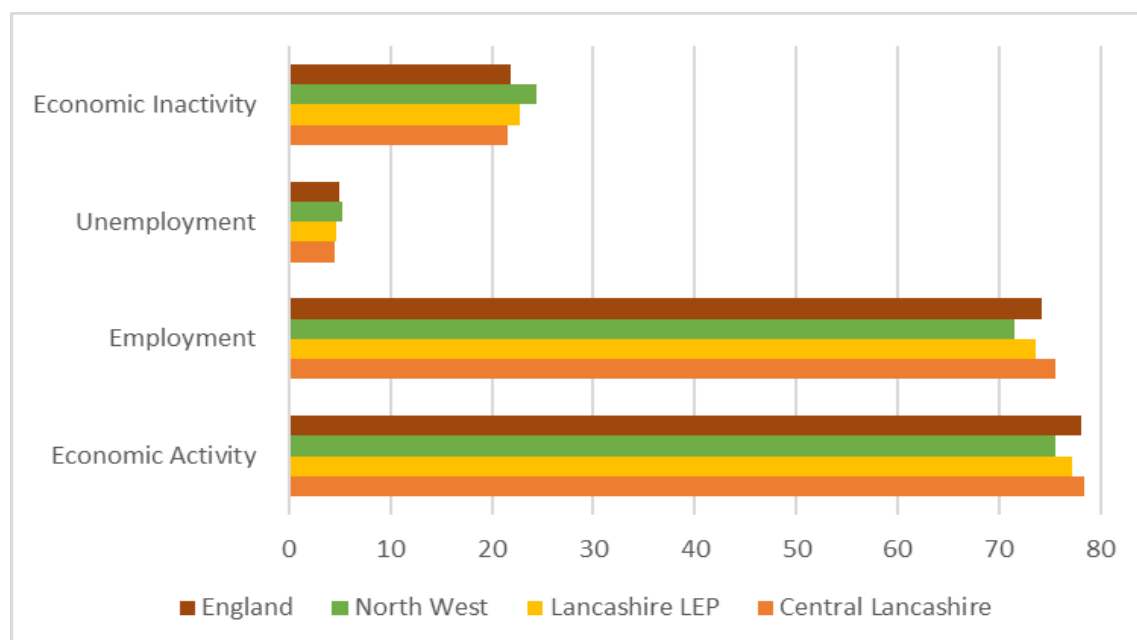
| Age | Chorley | | Preston | | South Ribble | | Central Lancashire | |
|--------------|----------------|--------------|----------------|--------------|----------------|--------------|--------------------|--------------|
| | No. | Percent | No. | Percent | No. | Percent | No. | Percent |
| Under 15 | 19,600 | 17.2 | 26,400 | 18.6 | 18,800 | 17.1 | 64,800 | 17.7 |
| 15-24 | 11,700 | 10.2 | 23,500 | 16.6 | 11,400 | 10.4 | 46,600 | 12.7 |
| 25-34 | 14,100 | 12.3 | 20,500 | 14.5 | 13,100 | 11.9 | 47,700 | 13.0 |
| 35-49 | 23,800 | 20.8 | 26,800 | 18.8 | 21,700 | 19.7 | 72,300 | 19.8 |
| 50-64 | 22,800 | 20.0 | 24,000 | 16.9 | 22,300 | 20.3 | 69,100 | 18.9 |
| 65-74 | 13,200 | 11.6 | 11,100 | 7.8 | 12,700 | 11.6 | 37,000 | 10.1 |
| 75+ | 8,900 | 7.8 | 9,600 | 6.8 | 10,000 | 9.0 | 28,500 | 7.8 |
| Total | 114,400 | 100.0 | 141,800 | 100.0 | 110,100 | 100.0 | 366,300 | 100.0 |

Source: Mid-Year Population Estimates, 2016

Key Labour Market Indicators

3.7 Figure 1 shows that patterns of economic activity in Central Lancashire are very similar to those in England, with 75.6 percent of working age people being in employment (74.2 percent in England) and 4.9 percent unemployed (5.0 percent in England). In Central Lancashire, South Ribble has the highest proportion of people in employment (83.4 percent), and Preston has the lowest (68.5 percent). Likewise, Preston has the highest unemployment rate – higher than all comparable areas at 6.2 percent, and South Ribble has the lowest at 3.5 percent.

Figure 1 – Economic Activity



Source: Annual Population Survey, 2016

Self-Employment and Home Working

3.8 On average, 8.2 percent of workers were self-employed across Central Lancashire in 2016, primarily in Chorley, where 11.9 percent were self-employed, and Preston, where 9.2 percent were (see Table 14). In comparison, only 3.1 percent of South Ribble’s workforce was in self-employment in 2016.

Table 14 – Self-Employment, 2016

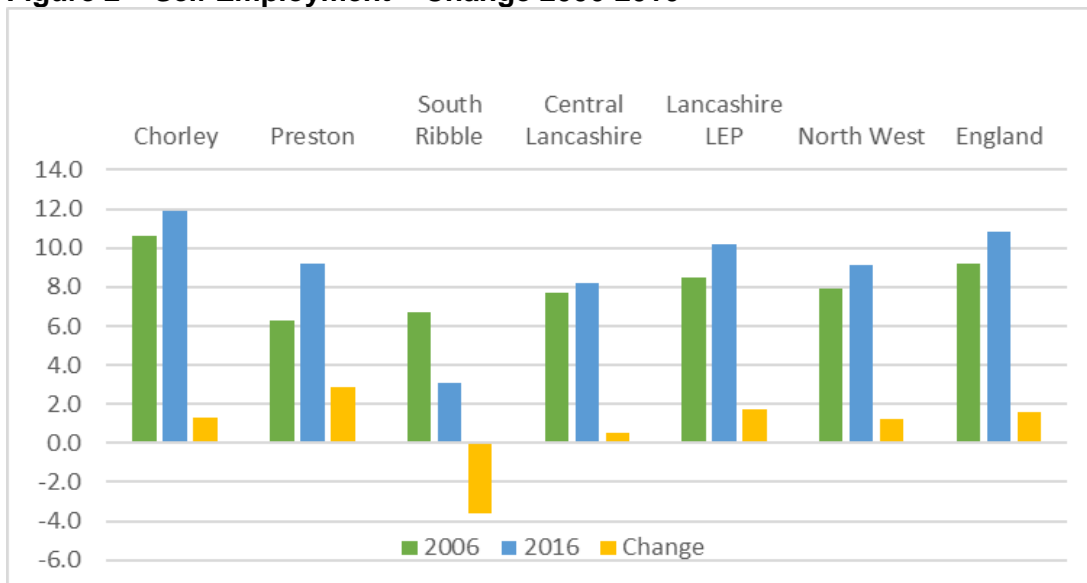
| | Number | Percent |
|--------------|--------|---------|
| Chorley | 7,900 | 11.9 |
| Preston | 8,600 | 9.2 |
| South Ribble | 2,200 | 3.1 |

| | Number | Percent |
|--------------------|-----------|---------|
| Central Lancashire | 18,700 | 8.2 |
| Lancashire LEP | 91,600 | 10.2 |
| North West | 406,100 | 9.1 |
| England | 3,742,400 | 10.8 |

Source: Annual Population Survey, 2016

3.9 Figure 2 shows that the proportion of self-employed people increased between 2006 and 2016 in all areas except South Ribble, where there was a 3.6 percent decline. Preston saw the largest increase of 2.9 percent – much larger than the increase seen anywhere else. Central Lancashire saw a moderate 0.5 percent increase in self-employment, less than that seen in the North West and England.

Figure 2 – Self Employment – Change 2006-2016



Source: Annual Population Survey, 2016

3.10 As Table 15 shows, levels of homeworking in Central Lancashire were on a par with the North West, and slightly less than England. Data here is based on the 2011 Census, which remains the key data source for assessing homeworking. Chorley had the highest proportion in Central Lancashire (3.5 percent), and Preston the lowest (2.3 percent).

Table 15 – Home Working

| | Work mainly at or from home | Percent |
|--------------------|-----------------------------|---------|
| Chorley | 2,809 | 3.5 |
| Preston | 2,437 | 2.3 |
| South Ribble | 2,228 | 2.8 |
| Central Lancashire | 7,474 | 2.8 |
| Lancashire LEP | 31,731 | 3.0 |
| North West | 144,079 | 2.8 |
| England | 1,349,568 | 3.5 |

Source: Census, 2011

Skills and Qualifications

- 3.11 Table 16 shows that Central Lancashire has a well-qualified working age population, with 37.9 percent qualified to NVQ Level 4 or above, equal to the English average and above average for the region. In Chorley, the NVQ4+ proportion rises to almost half the working age population, well above broader averages of 30-38 percent. Of the three local authorities, the proportion of people with no qualifications is highest in Preston (7.3 percent) although this is still low in the North West context. Just 5.5 percent of South Ribble's working age population are not qualified in any way. A smaller proportion of Preston's working age population are qualified to NVQ Level 4 or above than in the comparable areas.

Table 16 – Skills

| | No Qualification | NVQ1 | NVQ2 | NVQ3 | NVQ4+ | Other Qualification | Trade Apprenticeships |
|--------------------|------------------|------|------|------|-------|---------------------|-----------------------|
| Chorley | 6.3 | 89.6 | 84.1 | 64.2 | 49.6 | 4.2 | 5.4 |
| Preston | 7.3 | 86.1 | 69.8 | 49.2 | 30.0 | 6.7 | 1.7 |
| South Ribble | 5.5 | 93.5 | 81.6 | 58.3 | 34.1 | 5.4 | 4.8 |
| Central Lancashire | 6.4 | 89.7 | 78.5 | 57.2 | 37.9 | 5.4 | 4.0 |
| Lancashire LEP | 8.3 | 86.5 | 74.1 | 53.7 | 32.6 | 5.2 | 4.0 |
| North West | 9.5 | 84.8 | 73.0 | 53.7 | 34.0 | 5.7 | 3.5 |
| England | 7.8 | 85.5 | 74.2 | 56.8 | 37.9 | 6.7 | 3.4 |

Source: Annual Population Survey, 2016

Annual Pay

3.12 Median weekly pay varies between each of the Central Lancashire authorities, although a median figure for the combined Central Lancashire area is not available. As Table 17 shows, Chorley has the lowest workplace earnings, lower than the county and nearly £100 less than England’s median weekly pay. However, it has the highest resident earnings in Central Lancashire, and people living here earn more than those in Lancashire and England overall.

Table 17 – Median Weekly Pay

| | Workplace Earnings | Resident Earnings |
|----------------|---------------------------|--------------------------|
| Chorley | 451.3 | 546.9 |
| Preston | 498.5 | 479.1 |
| South Ribble | 485.3 | 511.8 |
| Lancashire LEP | 484.1 | 479.5 |
| England | 544.2 | 544.7 |

Source: Annual Survey of Hours and Earnings, 2016

3.13 Those who work in Preston earn more than the median average of workers in Lancashire, but those who live in the city earn less than those who live in the two other Central Lancashire authorities. South Ribble’s workers earn marginally more than the county average, but less than those working in Preston and England. South Ribble’s residents earn more than those living in Preston but less than those living in Chorley.

Occupations

3.14 Table 18 and Figure 3 show that the proportions of occupation groups broadly follow the same pattern as for the North West and England, with the highest proportion of working residents employed in professional occupations, and the lowest proportion as process, plants and machine operatives. However, when looked at in more detail for the three local authorities, they differ considerably.

3.15 Chorley has a high proportion of professional occupations, six percent higher than the North West and five percent higher than the proportion for England overall. South Ribble has the highest proportion of managers, directors and senior officials, although it is only slightly above Chorley. Preston has a far lower proportion of managers, directors and senior officials and associate professional and technical

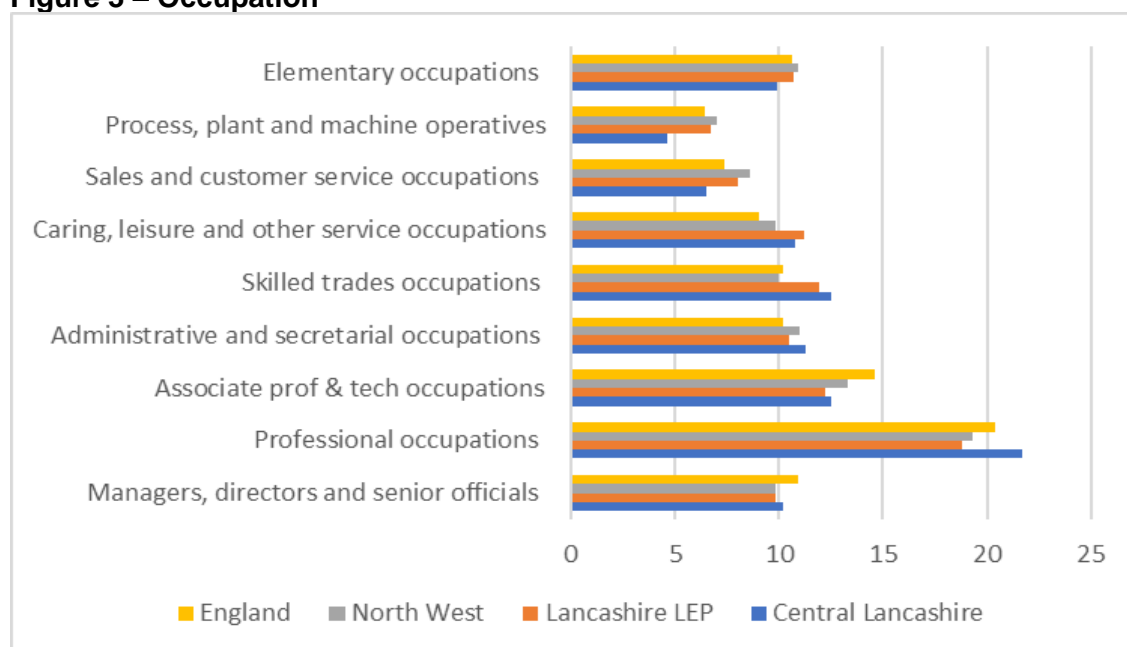
occupations). Preston also has half the proportion of administrative and secretarial occupations that South Ribble has. Preston has higher proportions of skilled trade occupations, caring, leisure and service occupations and process, plant and machine operatives.

Table 18 – Occupation, by Local Authority Area

| | Chorley | Preston | South Ribble | Central Lancashire |
|--|---------|---------|--------------|--------------------|
| Managers, Directors and Senior Officials | 12.0 | 6.5 | 12.2 | 10.2 |
| Professional Occupations | 25.4 | 21.0 | 18.7 | 21.7 |
| Associate Professional and Technical Occupations | 15.0 | 8.1 | 14.3 | 12.5 |
| Administrative and Secretarial Occupations | 11.8 | 7.0 | 15.0 | 11.3 |
| Skilled Trades Occupations | 8.8 | 14.9 | 13.9 | 12.5 |
| Caring, Leisure and Other Service Occupations | 10.8 | 13.7 | 8.0 | 10.8 |
| Sales and Customer Service Occupations | 5.4 | 5.9 | 8.1 | 6.5 |
| Process, Plant and Machine Operatives | 4.1 | 6.0 | 3.8 | 4.6 |
| Elementary Occupations | 6.7 | 17.0 | 5.9 | 9.9 |

Source: Annual Population Survey, 2016

Figure 3 – Occupation



Source: Annual Population Survey, 2016

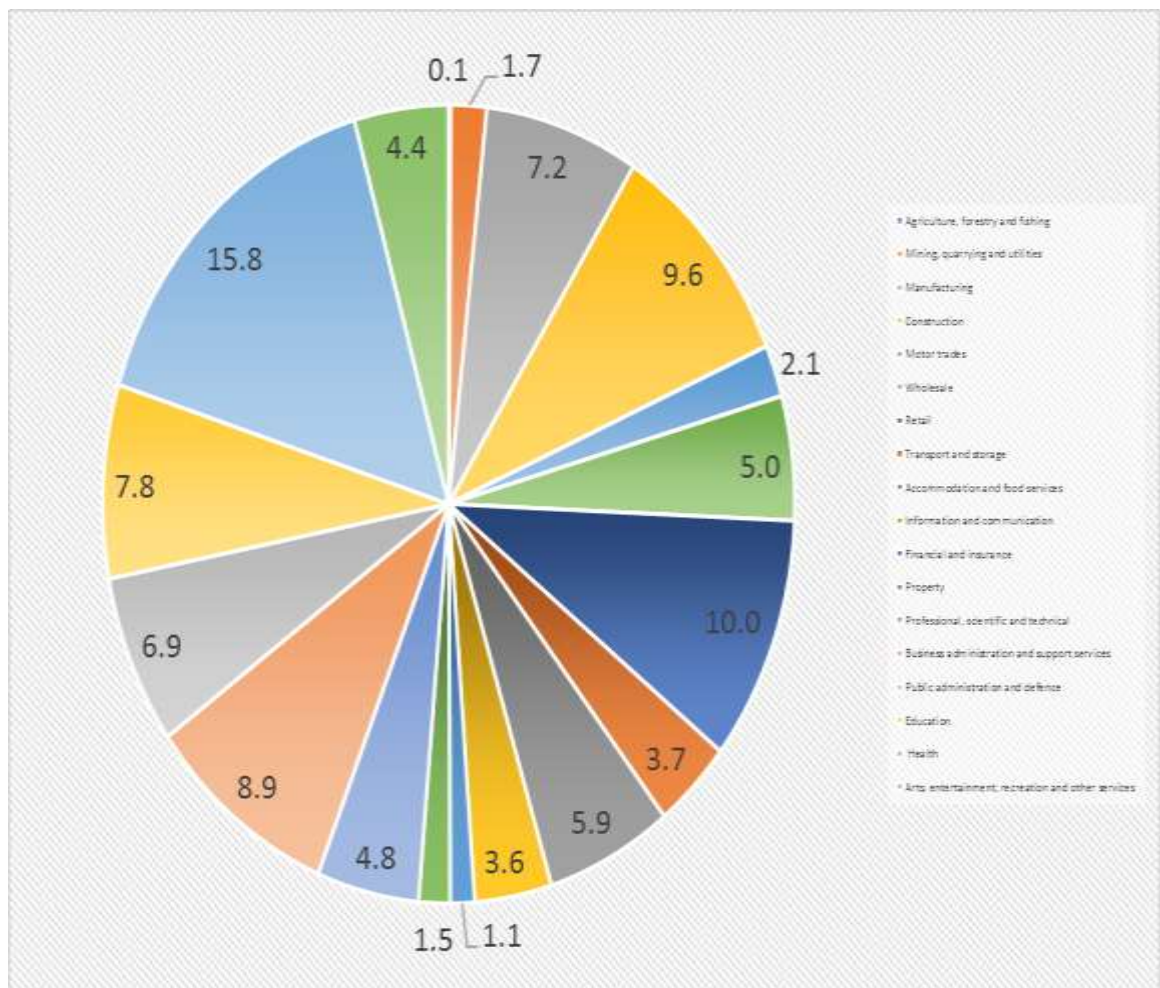
Current Sectoral Composition

3.16 The following section uses Business Register and Employment Survey (BRES) data to measure sectoral employment composition across Central Lancashire. It should be

noted that BRES data represents a sample survey of local employment, rounded up, and accordingly subject to errors. Figures in this section should thus be taken to represent broad trends only.

3.17 Figure 4 shows that 30 percent of Central Lancashire’s working population are employed in the public sector, in public administration, education and health. After retail and health, the strongest single sector is construction at 9.6 percent. Central Lancashire also compares well to Lancashire and the North West on employment in business administration and support services, but less so in other service sectors, particularly finance and insurance. Manufacturing and logistics employment, at the Central Lancashire level is somewhat below average.

Figure 4 – Central Lancashire Sector Breakdown, percent



Source: BRES, 2015

3.18 By local authority area, however, differing strengths can be identified:

- Chorley – Strengths in construction, retail, accommodation and food as well as the service sectors of ICT, professional scientific and technical and business administration, as well as health.
- Preston – Strengths in retail/wholesale, finance and insurance, property, professional scientific and technical, business administration, public administration and health
- South Ribble – Strengths in manufacturing and most noticeably construction. Also transport and storage.

Table 19 – Sector Employment Breakdown

| | Chorley | Preston | South Ribble | Central Lancashire | Lancashire LEP | North West | England |
|--|---------|---------|--------------|--------------------|----------------|------------|---------|
| Agriculture, forestry and fishing | 0.2 | 0.0 | 0.1 | 0.1 | 0.1 | 0.5 | 0.6 |
| Mining, quarrying and utilities | 0.4 | 0.7 | 3.9 | 1.7 | 1.3 | 1.1 | 1.1 |
| Manufacturing | 5.9 | 4.2 | 11.5 | 7.2 | 12.9 | 9.7 | 8.1 |
| Construction | 5.5 | 4.3 | 18.9 | 9.6 | 5.4 | 4.4 | 4.5 |
| Motor trades | 2.3 | 1.9 | 2.1 | 2.1 | 1.6 | 1.4 | 1.8 |
| Wholesale | 3.6 | 6.4 | 5.1 | 5.0 | 5.3 | 4.4 | 4.2 |
| Retail | 11.3 | 10.0 | 8.6 | 10.0 | 10.5 | 10.6 | 9.8 |
| Transport and storage | 3.4 | 3.4 | 4.2 | 3.7 | 3.3 | 4.6 | 4.7 |
| Accommodation and food services | 7.9 | 5.0 | 4.8 | 5.9 | 7.4 | 7.3 | 7.0 |
| Information and communication | 4.4 | 2.4 | 4.0 | 3.6 | 2.9 | 3.3 | 4.4 |
| Financial and insurance | 1.0 | 2.0 | 0.4 | 1.1 | 1.4 | 2.6 | 3.6 |
| Property | 1.0 | 1.7 | 1.7 | 1.5 | 1.2 | 1.6 | 1.7 |
| Professional, scientific and technical | 5.6 | 4.7 | 4.0 | 4.8 | 5.1 | 7.1 | 8.7 |
| Business administration and support services | 9.4 | 10.4 | 7.0 | 8.9 | 6.7 | 8.9 | 9.1 |
| Public administration and defence | 3.5 | 13.1 | 4.1 | 6.9 | 5.3 | 4.6 | 4.1 |
| Education | 9.5 | 7.4 | 6.6 | 7.8 | 9.4 | 8.9 | 9.2 |
| Health | 19.8 | 17.6 | 9.9 | 15.8 | 15.8 | 14.5 | 12.8 |
| Arts, entertainment, recreation and other services | 5.4 | 4.8 | 3.0 | 4.4 | 4.4 | 4.4 | 4.4 |

Source: BRES, 2016

3.19 Table 20 looks at growth and decline in sectoral employment over 2009-2015, across Central Lancashire. The highest proportionate losses were recorded in finance and insurance, which recorded a reduction in employment of almost 1,500 on 2009 levels. All three local authorities saw losses, but the bulk of the reduction, 1,061 jobs less on a 2009 figure of 2,622 was recorded for Preston. Manufacturing also saw an employment reduction of some 10 percent, or around 1,400 jobs. That reduction was spread relatively evenly through the three local authorities, each seeing 400-600 jobs reduced.

Table 20 – Major Sectors Growth 2009-2015 – Central Lancashire

| | Employment | Growth, percent |
|--|------------|-----------------|
| Mining, quarrying and utilities | 370 | 14.9 |
| Manufacturing | -1,392 | -10.4 |
| Construction | 1,690 | 11.9 |
| Motor trades | -685 | -16.0 |
| Wholesale | 405 | 4.5 |
| Retail | 322 | 1.9 |
| Transport and storage | -165 | -2.5 |
| Accommodation and food services | -532 | -5.2 |
| Information and communication | 719 | 14.2 |
| Financial and insurance | -1,495 | -40.1 |
| Property | -67 | -2.4 |
| Professional, scientific and technical | -289 | -3.4 |
| Business administration and support services | 1,145 | 7.8 |
| Public administration and defence | 1,187 | 9.0 |
| Education | -443 | -3.2 |
| Health | -2,323 | -7.8 |
| Arts, entertainment, recreation and other services | -1,028 | -12.0 |

Source: BRES, 2015

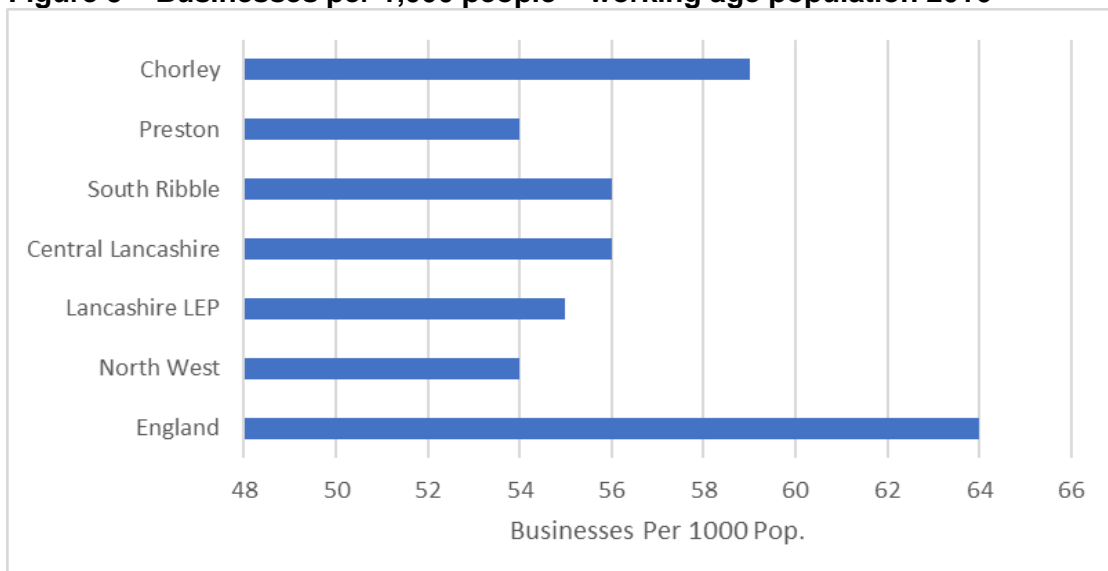
3.20 Conversely, good growth is recorded in the construction sector of some 1,700 additional jobs. Most of that growth, a gain of almost 2,000 jobs, was in South Ribble, with the Central Lancashire total reduced by a loss of some 300 jobs in Preston. Good growth was also observed in information and communication. This sector grew by some 1,300 jobs in South Ribble, but saw a 1,000-job reduction in Preston.

- 3.21 In comparison Preston saw its best growth in business administration and support services, gaining some 2,300 jobs. However, Chorley recorded a decrease of 2,800 jobs in this sector, a surprising level of reduction which, which is difficult to attribute to any specific cause – certainly Chorley did not see any large-scale loss or relocation of major service sector businesses/groups of businesses during this time Growth in public administration is concentrated in Preston.
- 3.22 Chorley recorded growth in transport and storage, some 200 jobs gained, along with retail and motor trades.

The Business Base

- 3.23 In 2016 there were approximately 12,995 businesses operating in Central Lancashire. Around a third of these, 4,200 (32.3 percent), were in Chorley, 5,005 (38.5 percent) were in Preston and 3,790 (29.2 percent), were in South Ribble. Across Central Lancashire this equates to a business density of 56 per 1,000 working age residents. Whilst out-performing the Lancashire and North West averages of 55/54, this lags the national average of 64 businesses per 1,000 working age residents (see Figure 5). Of the three local authorities, Chorley has by far the highest business proportion at 59 per 1,000 population, compared to 54 and 56 in Preston and South Ribble.

Figure 5 – Businesses per 1,000 people – working age population 2016

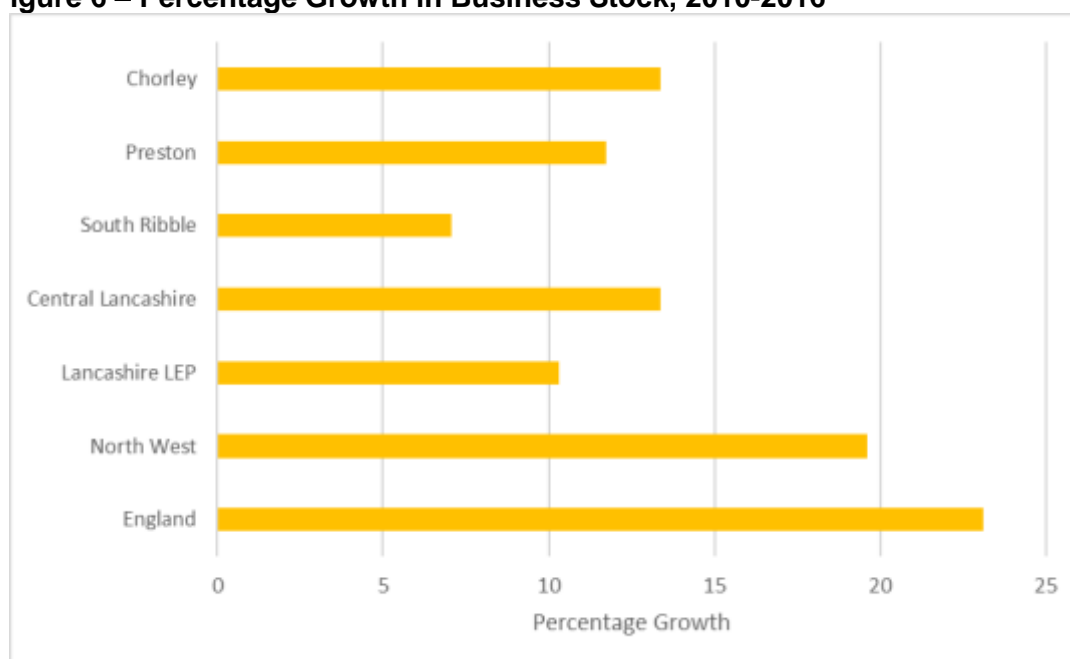


Source: UK Business Count & Annual Population Survey, 2016

- 3.24 The overall local stock of businesses has been increasing over time and across Central Lancashire the recorded growth was 13 percent over the last six years

(Figure 6). This growth in the number of businesses has outperformed the Lancashire LEP rate of 10 percent growth over the same period, but was modest in the regional and national context of 20-23 percent growth. Of the three Authorities, Chorley saw the best improvement at 13 percent, South Ribble the weakest at 7 percent.

Figure 6 – Percentage Growth in Business Stock, 2010-2016



Source: UK Business Count, 2016

Size of the Business Base

3.25 89.3 percent of businesses in England employ less than ten people (micro businesses), and overall 98.1 percent of all businesses are classified as small (up to 49 employees). Central Lancashire, and the constituent authorities, generally follow this broader trend. As Table 21 shows, 97.7 percent of businesses in Central Lancashire employ less than 50 employees, while the proportion employing less than ten is 87.7 percent. 50 local businesses are identified as having more than 250 employees. Of the three authorities, Chorley has the highest proportion of Micro-businesses and South Ribble the largest proportion of mid-large firms.

Table 21 – Business by Size Band 2016

| Area | Micro (0 to 9) | Small (10 to 49) | Medium-sized (50 to 249) | Large (250+) |
|--------------|----------------|------------------|--------------------------|--------------|
| Chorley | 89.0 | 9.3 | 1.4 | 0.2 |
| Preston | 87.2 | 10.4 | 1.9 | 0.4 |
| South Ribble | 86.9 | 10.4 | 2.0 | 0.5 |

| Area | Micro (0 to 9) | Small (10 to 49) | Medium-sized (50 to 249) | Large (250+) |
|--------------------|----------------|------------------|--------------------------|--------------|
| Central Lancashire | 87.7 | 10.0 | 1.8 | 0.4 |
| Lancashire LEP | 87.8 | 10.1 | 1.7 | 0.4 |
| North West | 88.3 | 9.6 | 1.7 | 0.4 |
| England | 89.3 | 8.8 | 1.6 | 0.4 |

Source: UK Business Count, 2016

Summary

- 3.26 Central Lancashire, and particularly Chorley, has a growing population both through natural factors but also through its ability to attract residents from other UK Local Authorities, along with some international migration. Preston has higher proportion of people aged 15-24 and a lower proportion of people over 65, than wider averages, reflecting, at least in part, the local student population associated with the University of Central Lancashire.
- 3.27 Across Central Lancashire, the working age population records average levels of economic activity compared to the national average. However, by local authority area, South Ribble has a proportionately high level of activity (83.4 percent) and Preston a low rate of 68.5 percent.
- 3.28 Employment is more likely to be with an employer rather than through self-employment overall, although Chorley has levels of self-employment above wider averages. Homeworking levels are average in Central Lancashire, but proportionately highest in Chorley at 3.5 percent.
- 3.29 Central Lancashire residents are most likely to be highly qualified in Chorley and most likely to have no qualifications in Preston.
- 3.30 The average Central Lancashire resident earns more than the average Central Lancashire worker in South Ribble and particularly Chorley. In Preston, the opposite is true which reflects the in-commuting of highly paid service sector workers to the City Centre and other employment areas.
- 3.31 Local sectoral strengths include:
- Chorley – Strengths in construction, retail, accommodation and food as well as the service sectors of ICT, professional scientific and technical and business administration, as well as health.

- Preston – Strengths in retail/wholesale, finance and insurance, property, professional scientific and technical, business administration, public administration and health
- South Ribble – Strengths in manufacturing and most noticeably construction. Also transport and storage.

3.32 Construction, ICT and business services are identified growth areas across Central Lancashire.

3.33 Central Lancashire has 56 businesses per 1,000 working age people, slightly above the average regionally, while Chorley has 59 businesses per 1,000, well above average. Chorley has also seen the best recent improvement in business numbers.

4.0 DEMAND ASSESSMENT – PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This section begins our consideration of the demand for land and property in Central Lancashire. It first provides some brief comments on national and regional market trends which will impact on the local demand for land and premises. The local market is assessed through a quantitative review of property enquiries and deals done alongside up to date market intelligence derived from consultations with a range of developers, scheme managers and property agents.

National and Regional Property Markets

- 4.2 Some brief comments on the wider market are first provided below, informed by recent national and regional research.

Industrial Market

- The national and regional picture is one of improving demand against a reducing stock of premises. There is a dearth of good quality existing buildings in prime locations, particularly for sub-1,000 sqm units and 'mid box' options of 5,000-10,000 sqm (Lambert Smith Hampton, 2016)
- Conditions in the UK industrial market continue to favour developers and investors as available supply in ready to occupy buildings remains restricted. E-commerce occupiers continue to drive growth, amongst those in the manufacturing sector who are performing well by recent standards. The present weaknesses appear to be represented by consumer goods firms, possibly reflecting manufacturers anticipating slower consumer demand as inflation picks up (Cushman and Wakefield, 2017)
- Prime headline rents for industrial units from 2,000-5,000 sqm currently sit at c. £6-7/sqft in Manchester and Warrington and evidence suggests that other prime North West locations may achieve these levels by Q4 2017 (Knight Frank, 2016). This is partially due to the slowing in the number of speculative developments, something evident in Central Lancashire, following the small South Ribble developments of 2015, which will inevitably drive prime rents up
- In terms of leasehold schemes, increased demand, relative to supply has led to upward pressure on rental values in many areas. Average secondary rental growth across the North West was 13 percent in 2015 (Knight Frank, 2016)
- At the start-up and micro business level, companies still want flexible terms and short lease lengths reflecting their inability to predict the longer-term future for their company
- Owner occupiers are becoming more prevalent with the increase in business confidence encouraging firms to expand and review their occupational requirements. This is leading to greatly strengthened freehold demand, but local markets frequently lack the freehold stock to meet needs
- This many encourage firms to relocate from areas with limited options for owner occupancy, once those businesses reach a certain stage of maturity. However, this is dependent on the nature of the business. For example, high value and high technology sectors will require a high grade of space which can only be found in certain locations.

Warehouse Market

- 2016 saw the highest amount of national large shed take-up on record. A total of 3,460,000 sqm of warehouse space was transacted, with a surge in demand noted across all regions. While the North West saw a small decline in the area of space transacted, it did, however, experience a 10 percent increase in deal volume.
- Supply remains critically low nationwide, with just 2,760,000 sqm currently available. Only 17 units are currently under construction across the country, which will supply 300,000 sqm. However, this is still less than a year's supply in the market.
- The North West currently has 710,000 sqm available across 40 existing large industrial units, however with just over 100,000 sqm of grade A space available, the majority of which is either under offer or exchanged, the region faces the threat of depleted supply by the end of 2017. In 2016, grade A space accounted for 72 percent of all space transacted, comprised of four units all let within six months of practical completion
- Despite the rapid decreasing lack of available supply, it is anticipated that take-up will continue to increase steadily throughout the next few years, with the online retail sector remaining a strong driver of growth
- Ongoing demand improvement will encourage further development, particularly of speculative space, while constraints on supply will drive further rental growth. Any constraints on growth are likely to come through uncertainty in the investment market, following global stock market falls and the ongoing impact of the EU Referendum decision. (Savills, 2017)
- Prime rents for distribution/warehouse units of above 5,000 sqm sit at £6.15/sqft in Manchester and Warrington. Rents of this level are being achieved in prominent locations elsewhere in the North West (Knight Frank, 2016)
- In addition to national and regional distribution facilities, the growth of online retail, with same day/next day delivery commitments, will increase demand for local distribution depots on routes with strong access to major settlements.

Office Market

- Manchester and Liverpool are benefitting from growth in financial and professional services, while locations such as Preston are seeing increased demand from a broader range of professional services, ICT and business administration sectors.
- Pre-letting activity drove the North West regional office market in 2016. Annual take-up volume totalled 510,000 sqm, short of the record 530,000 sqm total achieved in 2014.
- Regional office locations have become primarily pre-letting markets, partially due to the critically low availability of grade A office stock. Across the region, only 12 months of grade A supply remains. 43 percent of all new development space was let on completion and, in 2017, 21 percent of the space is already taken. Given this high level of pre-letting, grade A availability is expected to be depleted by the end of 2017.
- 2017 is set to see around 230,000 sqm of grade A space complete, the highest volume of development since 2009. However, economic and political uncertainties may see several committed schemes fail to commence, as occupiers, investors and developers put decisions on hold until the shape of the post-Bexit economy becomes clearer. Caution in the investment market will make it difficult for regional cities to get the funding they need for new build schemes unless a portion of the new space can be pre-let before construction begins. (Cushman and Wakefield, 2016)
- The UK will continue to remain as a target destination for overseas capital however, although some investors may be put off by a lack of openly marketed stock. Regional leasing activity is expected to be boosted as the Government Property Unit rolls out its regional hubs programme. This should benefit Preston where the Altus development in the City Centre is aimed specifically at Government activities.
- However, while there is a shortage of high grade space, there remains a significant regional stock of second hand offices. In the short term this stock will actually grow as companies seek to upgrade to better options. A growing market will encourage refurbishments, and increased pressure for office to residential conversions is also likely for stock judged unable to meet modern occupier needs, even with investment.

Local Property Market

Public Sector Enquiries

- 4.3 All three of the respective local authorities have collected property enquiries information, through a mixture of telephone contacts with officers and online sources. This information is then collated and analysed using the Evolutive software programme. The Evolutive systems records the size and type of commercial property required for each enquiry received by the Council but, Evolutive floorspace data is either incomplete or includes exceptionally high figures which are difficult to interpret. Thus, the tables below examine the supplied data regarding property type only, although commentary is provided on the sizes of premises most commonly sought in the industrial and office markets.

Chorley

- 4.4 Table 22 provides a year by year analysis of the number of enquiries for Chorley, between 1st January 2006 and 31st December 2016. Over this period, there were 2,303 property enquiries. Around a third of enquiries were for industrial properties.

Almost a quarter were for retail, 17.8 percent for offices and some 15 percent for storage or trade units. Other sectors saw only modest market interest. This same broad pattern, in terms of relative levels of interest can be seen in Preston and South Ribble as well.

Table 22 – Enquiries 2006-2016 Type – Chorley

| | Office ¹ | Industrial ² | Storage ³ | Retail ⁴ | Land ⁵ | Investment Purchase (Any Type) | Leisure / Tourism | Medical / Clinical | Total |
|----------------|---------------------|-------------------------|----------------------|---------------------|-------------------|--------------------------------|-------------------|--------------------|--------------|
| 2006 | 68 | 142 | 33 | 79 | 2 | 3 | 7 | 3 | 337 |
| 2007 | 63 | 88 | 32 | 62 | 15 | 4 | 5 | 1 | 270 |
| 2008 | 41 | 62 | 22 | 36 | 9 | 6 | 5 | 9 | 190 |
| 2009 | 21 | 26 | 10 | 9 | 6 | 3 | 4 | 3 | 82 |
| 2010 | 25 | 59 | 38 | 26 | 13 | 13 | 3 | 4 | 181 |
| 2011 | 65 | 75 | 33 | 91 | 4 | 15 | 5 | 2 | 290 |
| 2012 | 18 | 67 | 30 | 31 | 8 | 8 | 6 | 2 | 170 |
| 2013 | 32 | 66 | 47 | 51 | 9 | 7 | 3 | - | 215 |
| 2014 | 18 | 47 | 39 | 36 | 4 | 2 | 3 | 1 | 150 |
| 2015 | 36 | 91 | 32 | 73 | 3 | 14 | 2 | 2 | 253 |
| 2016 | 23 | 63 | 26 | 39 | 6 | 8 | - | - | 165 |
| Total | 410 | 786 | 342 | 533 | 79 | 83 | 43 | 27 | 2,303 |
| Percent | 17.8 | 34.1 | 14.9 | 23.1 | 3.4 | 3.6 | 1.9 | 1.2 | 100.0 |

Source: CBC, 2017

1. Office – includes Call Centre enquiries, which are recorded separately. Call centre requirements were specifically recorded in 2007, 2008, 2009, 2010, and 2011
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately
4. Retail – includes Food Outlets which are separately recorded
5. Land – includes those enquires listed as Yard.

4.5 In Chorley, enquiries gradually reduced from 2006 to 2009, reflecting the recession period, and dropped to their lowest recorded level in 2009. Industrial enquiries saw an early decrease between 2006 and 2007, but by 2009 decreases in interest for all types of property were evident. 2010/11 saw a sharp improvement in interest, reflecting the first onset of national recovery, with fluctuations since then. 2013 and 2015 have proved the strongest post-recession years to date.

4.6 As noted, total floorspace figures are difficult to analyse but most enquiring sought industrial units of sub-300 sqm while 10 percent of industrial enquiries were for premises of more than 2,300 sqm. It is likely that those enquiring for very large space

had an area of search greater than Chorley Borough, and may also have enquired for Preston and/or South Ribble as well.

- 4.7 Two thirds of those enquiring for office space sought suites of less than 300 sqm. Of this, 35 percent were for less than 93 sqm. Only 5 percent of enquiries for office premises were for suites of 2,300 sqm or greater.

Preston

- 4.8 Table 23 provides a year by year analysis of the number of enquiries for Preston, between January 2006 and December 2016. Over this period, there were 5,564 property enquiries. As for the Chorley and South Ribble, industrial enquiries dominate, followed by retail and offices. The main variation is a lack of interest in local storage space, compared to other parts of Central Lancashire.

Table 23 – Enquiries 2006-2016 Type – Preston

| | Office ¹ | Industrial ² | Storage ³ | Retail ⁴ | Land ⁵ | Investment Purchase (Any Type) | Leisure / Tourism | Medical / Clinical | Total |
|----------------|---------------------|-------------------------|----------------------|---------------------|-------------------|--------------------------------|-------------------|--------------------|--------------|
| 2006 | 156 | 276 | 8 | 206 | 2 | 6 | 8 | 2 | 664 |
| 2007 | 157 | 199 | 8 | 198 | 18 | 21 | 2 | 1 | 604 |
| 2008 | 153 | 220 | 2 | 178 | 12 | 22 | 4 | - | 591 |
| 2009 | 107 | 202 | 4 | 166 | 9 | 6 | 12 | 1 | 507 |
| 2010 | 97 | 169 | 2 | 137 | 15 | 13 | 15 | - | 448 |
| 2011 | 90 | 224 | 16 | 202 | 13 | 43 | 26 | 1 | 615 |
| 2012 | 84 | 183 | 7 | 203 | 7 | 23 | 7 | - | 514 |
| 2013 | 91 | 189 | 5 | 198 | 7 | 23 | 10 | - | 523 |
| 2014 | 69 | 179 | 2 | 174 | 6 | 17 | 17 | - | 464 |
| 2015 | 61 | 161 | 2 | 93 | 5 | 21 | 5 | - | 348 |
| 2016 | 53 | 112 | 3 | 107 | 5 | 3 | 3 | - | 286 |
| Total | 1,118 | 2,114 | 59 | 1,862 | 99 | 198 | 109 | 5 | 5,564 |
| Percent | 20.0 | 38.0 | 1.1 | 33.5 | 1.8 | 3.5 | 1.9 | 0.2 | 100.0 |

Source: PCC, 2017

1. Office – includes Call Centre enquiries, which are recorded separately.
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately
4. Retail – includes Food Outlets which are separately recorded
5. Land – includes those enquires listed as Yard.

- 4.9 Following a strong level of enquiries from 2006 to 2011, surprising for Preston is the trend that the number of enquiries has reduced on an almost year-on-year basis, both overall and for most property sectors, since 2011. This is despite the national

recovery in market demand, however may indicate a reduced use of public sector agencies for property enquiries rather than a reduction in market activity.

- 4.10 Of the 1,118 office enquiries received, 60 (or 5 percent) are call centre specific.
- 4.11 Two thirds of industrial enquiries are for units of less than 900 sqm and 40 percent want units of less than 300 sqm. 63 percent of office enquiries are for suites of less than 300 sqm, with most seeking properties of 93-300 sqm. One trend to note is an increasing number of requirements for very large offices, 2,300 sqm or greater, since 2011.

South Ribble

- 4.12 Table 24 provides a year by year analysis of the number of enquiries for South Ribble, between 1st January 2004 and 31st December 2016. Over this period there were some 5,148 relevant enquiries. Again, the industrial market dominates, followed by office and retail.

Table 24 – Enquiries 2004-2016 Type – South Ribble

| | Office ¹ | Industrial ² | Storage ³ | Retail ⁴ | Land | Investment Purchase (Any Type) | Leisure / Tourism | Medical / Clinical | Total |
|----------------|---------------------|-------------------------|----------------------|---------------------|------------|--------------------------------|-------------------|--------------------|--------------|
| 2004 | 120 | 255 | - | 111 | - | 2 | 3 | - | 491 |
| 2005 | 138 | 245 | 1 | 115 | - | 3 | - | - | 502 |
| 2006 | 75 | 168 | 34 | 69 | 2 | 3 | 12 | 2 | 365 |
| 2007 | 96 | 127 | 39 | 75 | 22 | 17 | 7 | 16 | 399 |
| 2008 | 80 | 141 | 22 | 58 | 27 | 19 | 14 | - | 361 |
| 2009 | 138 | 184 | 11 | 102 | 12 | 41 | 31 | 3 | 522 |
| 2010 | 103 | 188 | 7 | 106 | 6 | 31 | 30 | - | 471 |
| 2011 | 127 | 281 | 90 | 135 | 4 | 22 | 43 | 11 | 713 |
| 2012 | 53 | 113 | 13 | 55 | 10 | 9 | 2 | - | 255 |
| 2013 | 18 | 62 | 12 | 23 | 6 | 1 | - | - | 122 |
| 2014 | 69 | 203 | 12 | 83 | 9 | 24 | 3 | 2 | 405 |
| 2015 | 49 | 122 | 14 | 53 | 14 | 16 | 4 | 1 | 273 |
| 2016 | 41 | 126 | 21 | 41 | 14 | 20 | 4 | 2 | 269 |
| Total | 1,107 | 2,215 | 276 | 1,026 | 126 | 208 | 153 | 37 | 5,148 |
| Percent | 21.5 | 43.0 | 5.4 | 19.9 | 2.5 | 4.0 | 3.0 | 0.7 | 100.0 |

Source: SRBC, 2017

1. Office – includes Call Centre enquiries, which Evolutive records separately. Call centre requirements were specifically recorded in 2007, 2008, 2009, 2011, 2014 and 2016
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class, but which Evolutive records separately

3. *Storage – includes Trade Units, which fall within B8 Use Class, but which Evolutive records separately*
4. *Retail – includes Food Outlets which are separately recorded by Evolutive.*

- 4.13 For certain categories, including the primary categories of office and industrial, the general level of enquires remained high over 2004-2011 and only reduced in the late recession period of 2012/13. Enquiry levels recovered after that point, but after a spike in 2014, have remained below pre-recession levels. This trend is evident across all the market sectors.
- 4.14 Over 40 percent of all enquiries recorded since 2004 were for industrial premises and almost one-quarter were for office premises. One-fifth of enquiries were accounted for by retail enquiries, where figures were especially high from 2009 to 2011. Medical/Clinical enquiries appear in 2011 for the first time since 2009 and indeed are not represented again until 2014. 2011 also represents the peak of Leisure/Tourism enquiries following a period of strong activity from 2009.
- 4.15 In terms of industrial enquiries, while around a quarter of enquiries were for units of 300 sqm or less, it is important to note that market interest has been recorded for units in all size brackets up to 2,300 sqm, although demand for larger units has reduced since 2011.
- 4.16 Office requirements in South Ribble are generally for small suites, with 40 percent of enquires for sub-100 sqm units. Very large property enquiries, for premises of more than 2,300 sqm are rare and likely to be Central Lancashire-wide. Interest for call centre operations is focused towards smaller facilities of less than 1,000 sqm.

Property Deals

- 4.17 Data on recorded industrial and office property transactions (Property Deals) completed in Central Lancashire over the last decade has been obtained from EGi and is discussed below.

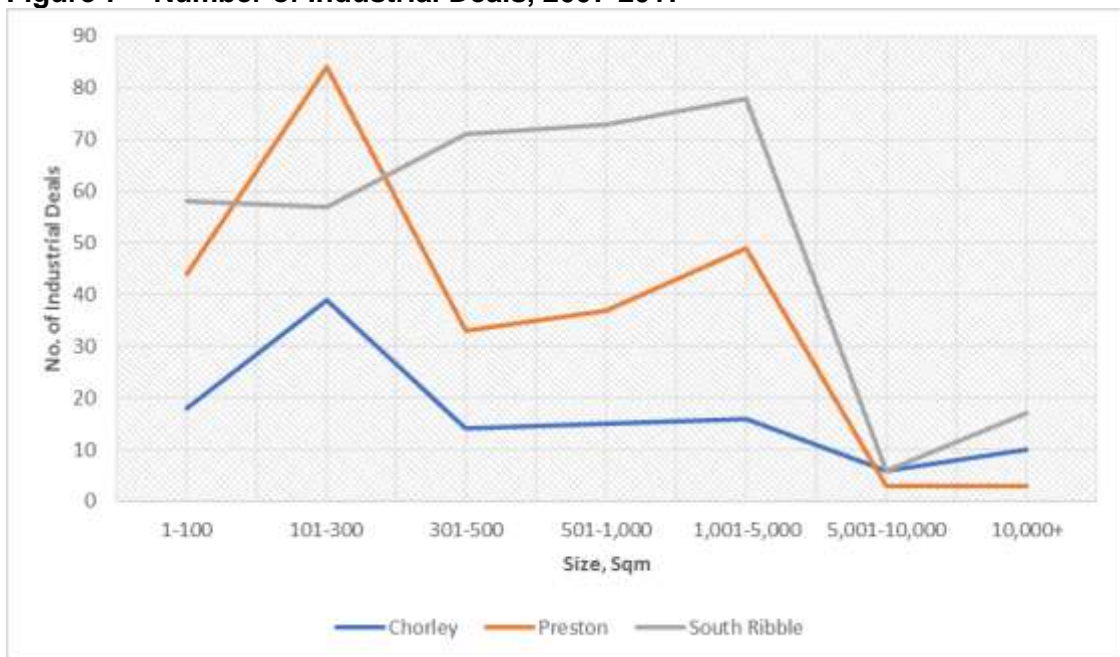
Industrial

- 4.18 Overall, 737 industrial deals were recorded within the period 2007-2016 across Central Lancashire, comprised of 1,265,468 sqm of floorspace (see Figures 7 and 8). South Ribble was most active, accounting for the largest share of both deals (49 percent of the total) and floorspace (57 percent). Behind this was Preston with 35

percent of deals, however Chorley accounts for the second largest floorspace total (27 percent).

4.19 Across all areas, deals have been completed to a level above 10,000 sqm. However, the largest transactions mostly occurred in Chorley and South Ribble, at Buckshaw Village and Walton Summit. The largest individual transactions include the letting of some 45,000 sqm of premises at 189-191 Bradkirk Road, Walton Summit to Merlin Diesel Systems in 2010 and the letting/investment sale of the Waitrose warehouse logistics property, some 39,000 sqm in 2012 and 2015.

Figure 7 – Number of Industrial Deals, 2007-2017

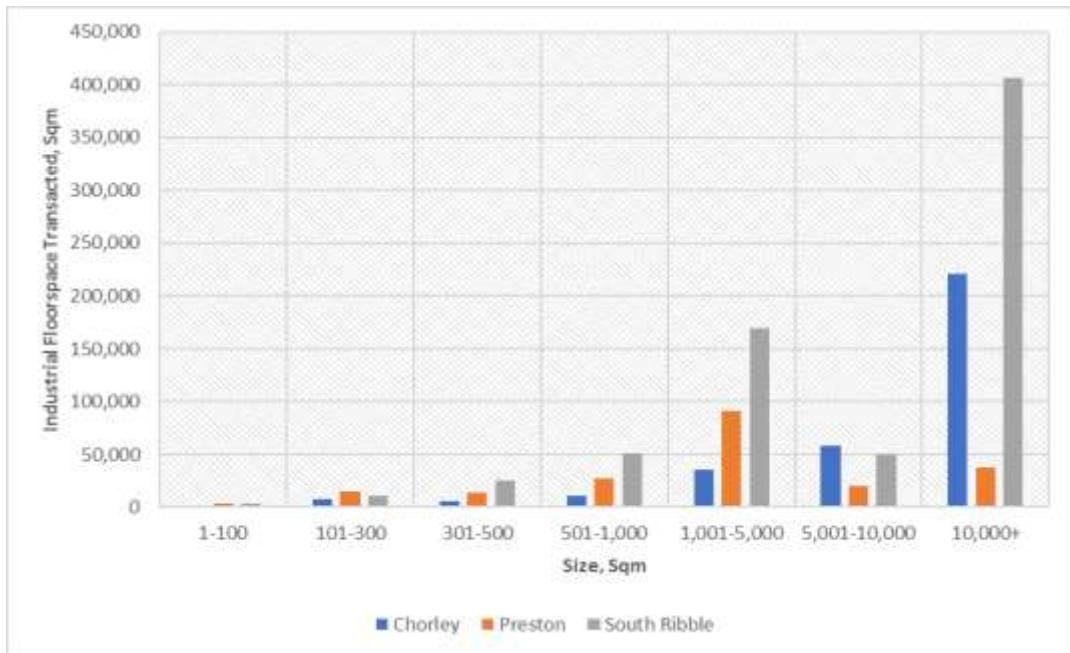


Source: EGi, 2017

4.20 In both Chorley and Preston, the strongest market is for smaller industrial units of 101-300 sqm, while the 5,001-10,000 sqm size range saw the least market interest in all areas. South Ribble differs in that mid-sized units of 1,001-5,000 are most commonly transacted, reflecting the strength of locations such as Walton Summit for larger business occupancy.

4.21 All areas saw slow but consistent growth in market transactions over the decade, even during the 2008-2013 recessionary period. In all areas, 2015 was a peak in market activity, with modest reductions recorded in 2016.

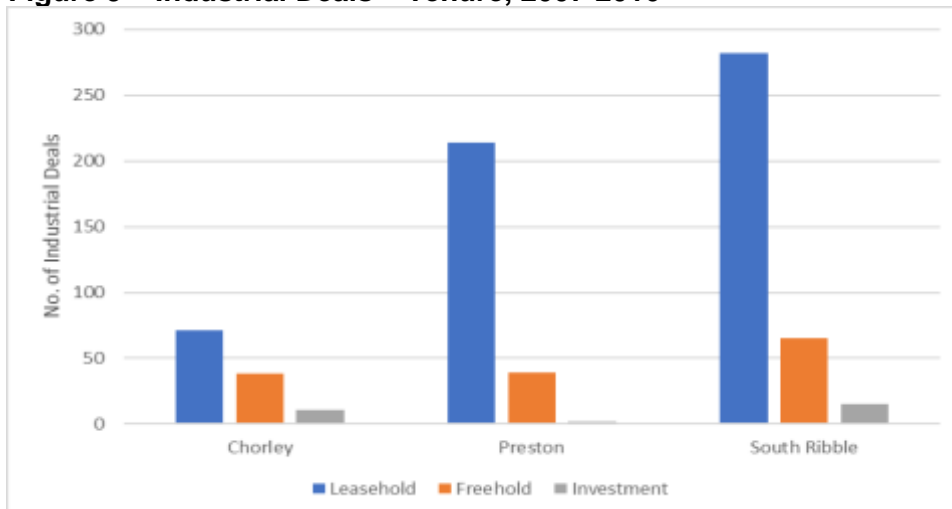
Figure 8 – Industrial Floorspace Transacted, 2007-2017



Source: EGi, 2017

4.22 As Figure 9 shows, most industrial deals were completed on a leasehold basis, 77 percent of the overall total. 19 percent were completed on a freehold basis, with the remaining 4 percent completed as investment sales. The area with the most freehold and investment sales was South Ribble (22 percent of its overall total). However, as a proportion of the total, 40.8 percent, Chorley has the most active freehold and investment market. Only two industrial investment deals were recorded in Preston from 2007 to 2016.

Figure 9 – Industrial Deals – Tenure, 2007-2016

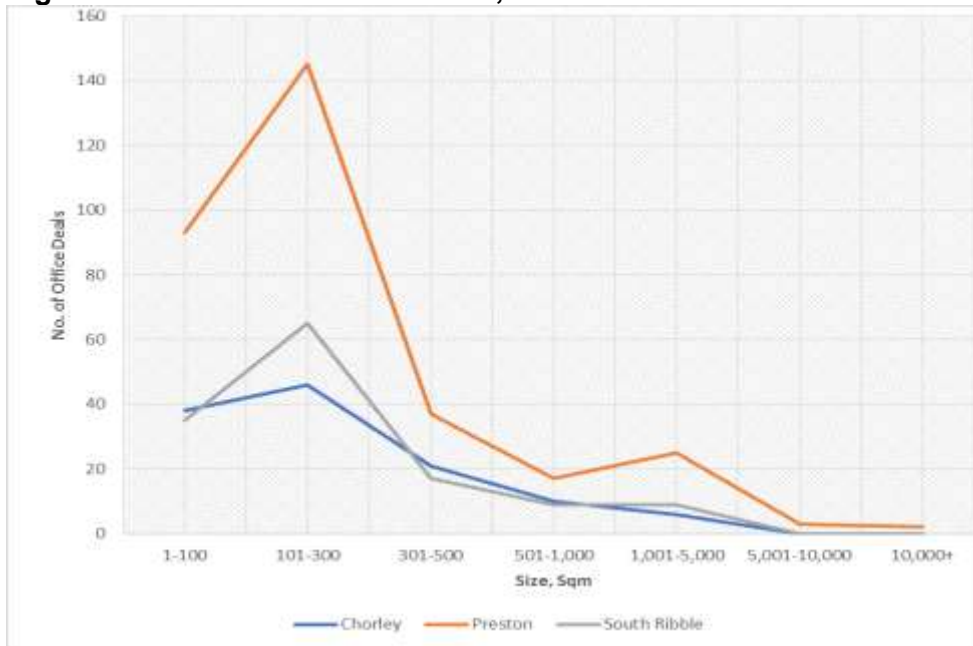


Source: EGi, 2017

Office

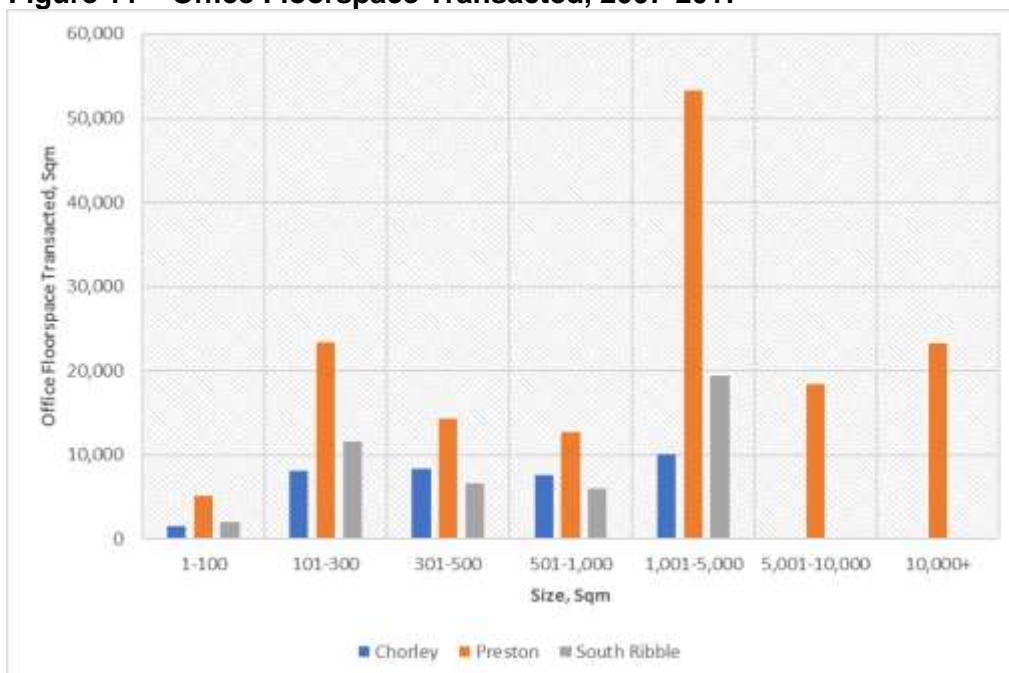
4.23 Overall, 582 office deals were completed over 2007-2017, totalling 231,916 sqm (see Figures 10 and 11). Unsurprisingly Preston accounts for the largest share of office deals (56 percent) and floorspace (65 percent), followed second by South Ribble with a 23 percent share of the deals and a 20 percent share of total floorspace.

Figure 10 – Number of Office Deals, 2007-2017



Source: EGi, 2017

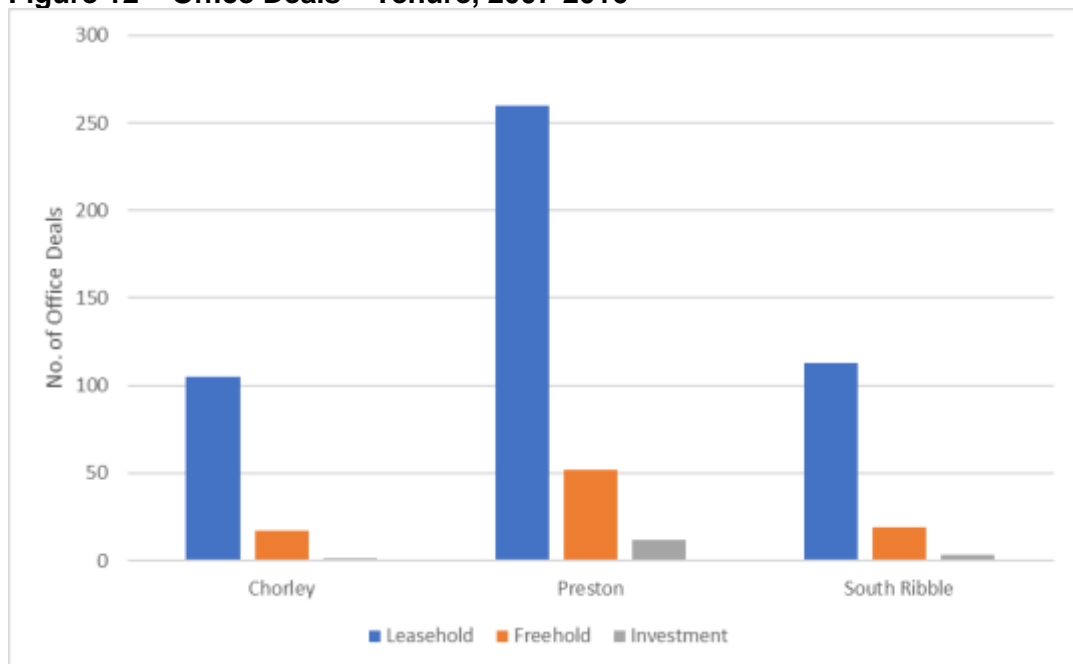
Figure 11 – Office Floorspace Transacted, 2007-2017



Source: EGi, 2017

- 4.24 Almost three quarters of deals in Central Lancashire were for suites of up to 300 sqm, with the 101-300 sqm size range most active. Preston has shown further market strength in the 1,001-5,000 sqm range and is the only local authority area to record any deals for premises larger than 5,000 sqm. The largest deal on record was the investment sale of Lowthian House, Market Street, 11,637 sqm, to Kenmore Group in 2007. The largest letting was Tustin Court, Port Way, 7,058 sqm, to Manchester and District Housing in 2010.
- 4.25 Preston especially has seen strong growth in the office market since 2007, from the 12 deals recorded in this year to the 49 recorded in 2016. For South Ribble and Chorley, deal totals have remained relatively consistent with no great fluctuation either way. For both, 2013 saw recorded deals peak at 22 for the year. In Preston, this peak was achieved in 2015 with 50 deals, almost matched with the 49 recorded in 2016.
- 4.26 As Figure 12 shows, most office deals, 82 percent, were completed on a leasehold basis. 15 percent were completed on a freehold basis with the remaining 3 percent completed as investment sales. Investment deals occurred in all areas, but three quarters were in Preston.

Figure 12 – Office Deals – Tenure, 2007-2016



Source: EGI, 2017

Property Market – Stakeholders

4.27 The above analysis of the property data pertaining to Central Lancashire has been supported by consultations with commercial property agents active in Central Lancashire. Agents were asked about activity levels in Central Lancashire, and the three local authority areas individually, key market sectors, spatial differences and the key employment nodes. Feedback from the agents is summarised in the tables below. Information provided has been separated from the name of the agent or agency to protect confidentiality. Table 25 provides a breakdown of the general comments received about industrial and office land in Central Lancashire.

Table 25 – Property Market Comments – Land

| Contact | Comment |
|--------------------------|---|
| Regional Agent | <i>Central Lancashire Wide</i> Slow delivery of small business premises, but a general shortage of employment land across Central Lancashire. Land at Buckshaw Village has been lost to housing, Moss Side Test Track, Leyland has infrastructure issues. Walton Summit also has no direct growth options at present. Investment also required to open up land at North East Preston. The Cuerden Strategic Site will be key for meeting needs at the larger end of the market, in particular carrying forward the Central Lancashire logistics market first established at Revolution Park, Buckshaw Village. |
| Regional agent | Chorley/South Ribble Chorley Council appear willing to promote development sites in order to deal with the supply issue. However, both South Ribble and Chorley are suffering from a major lack of development land. Developers and owner occupiers are constantly looking, but there is little to satisfy. |
| Central Lancashire agent | <i>Central Lancashire Wide</i> Any land sales are generally for owner occupation – private developers cannot sustain the cost/return on new developments. New build industrial rents do not exceed £6.50/sqft, developers cannot make a profit at this level against construction costs. Feel this will change over the next three years, in the industrial market at least, given projected healthy growth in demand. |

Source: BE Group, 2017

4.28 Table 26 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

Table 26 – Property Market Comments – Industrial

| Contact | Comment |
|--------------------|--|
| National Developer | <i>Central Lancashire Wide</i> Strong shortage of all types of premises, particularly sub-50 sqm light industrial workshops, and a need for new development. However, viability remains an issue with build costs of around £70/sqft, requiring rents of £7.50/sqft for viability. Local rents do not exceed £5-6/sqft however. One strong market is for hybrid space, comprising some 300 sqm of |

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| | <p>production space and 100 sqm of offices. These are aimed at internet wholesalers/retailers who mix ICT operations with production/distribution of products. Such units have successfully been delivered in the North West, at locations including Shadsworth, Blackburn. They can be expensive though, requiring rents of around £8/sqft to be viable, a hard level to achieve locally. They can be successfully offered for sale though.</p> <p>The market is for freehold options at present as low interest rates mean that even small businesses can afford to invest in their own premises. This has driven recent successful freehold developments in Buckshaw Village and South Rings, South Ribble.</p> |
| Regional Agent | <p><i>Central Lancashire Wide</i></p> <p>Two key geographic markets – North East Preston and Walton Summit/Moss Side, South Ribble. With Buckshaw Village emerging as a third – which operate largely independently, i.e. requirements are generally for one or the other.</p> <p>Demand is for industrial units of 0-1,500 sqm and around half of requirements are for freehold premises, reflecting greater business confidence in the economy and greater access to capital finance. Also see regular interest for 500-2,000 sqm and 4,000-5,000 sqm industrial and warehouse options. There is a particular lack of logistics options which would allow Central Lancashire to compete in the regional warehouse market.</p> <p>Against this demand there is a strong shortage of stock. Most stock that is available is from the 1980s/90s and the recent recovery has not been accompanied by a boom in development. For larger premises this has put some upward pressure on rents, e.g. with growth from £4-4.50/sqft to £5.50/sqft in evidence at Walton Summit for 500-1,000 sqm units. New build space, e.g. Ribble Court at Red Scar Industrial Estate can achieve £6.50/sqft, but this still cannot match build costs, rendering most development unviable. Even for freehold, it is difficult to achieve the £100/sqft necessary to viably develop new build when average sale prices are £60-70/sqft.</p> <p><i>Samlesbury</i></p> <p>Modest occupier interest but requirements for manufacturing generally rather than specifically for aerospace and related. Some also put off by the secure nature of the site which makes it appear that it will only cater for defence industries.</p> |
| Central Lancashire Investor | <p><i>South Ribble</i></p> <p>Own South Preston Office Village, South Rings Office Park, Buckshaw Village and South Rings Momentum Business Centres and units at Walton Summit Employment Area, Bamber Bridge.</p> <p>Completed Momentum Business Centre at South Rings in 2015/16 with some 42 units sold off plan and achieving values of £115/sqft. Demand came from local firms looking to grow.</p> |
| National agent | <p><i>Chorley/South Ribble</i></p> <p>Agents for Northern Trust schemes across Chorley and South Ribble. The stock it markets across both areas is almost completely full, with demand thus exceeding supply across all size ranges.</p> <p>Leyland/Farington in particular is a popular industrial area, achieving £6/sqft for good quality stock. Good quality, modern industrial units are needed, but there appears to be limited development land on which to build.</p> <p>Mainly leasehold transactions, although there is still a lack of freehold</p> |

| Contact | Comment |
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| | space to meet needs. |
| Regional agent | <p><i>Preston</i> Commercial agents for the motor trade industry. Based in Warrington, but working primarily in Preston and Blackburn. Demand is consistently high for all areas – especially Preston – however stock is relatively low and there is a lack of development land for the scale of interest. Clients are looking for a mixture of land and existing units, with motorway junction locations a priority – as with all car uses. However reduced supply is started to turn interest away from Preston. Companies are now being forced to look towards Warrington and Blackburn (for enquiries outside of Manchester) with a mandate for high-profile, motorway locations. Land values fluctuate around Preston – with highest values in and around the City Centre. Again however, supply is limited</p> <p><i>Chorley/South Ribble</i> South Ribble and Chorley not seen as primary locations. Majority of interest will be for either Preston or Blackburn.</p> |
| Regional agent | <p><i>Chorley/South Ribble</i> The industrial market is consistently buoyant in South Ribble/Chorley; however, a lack of stock is starting to become a problem. Units move quickly across all size ranges – particularly those of good quality. Several industrial schemes – Roundhouse/Momentum schemes across Chorley and South Ribble – have done well finding tenants and commanding rents of £8-10/sqft. This compares well to equivalent schemes across Lancashire. Secondary industrial and larger units achieve £5.50-6.00/sqft, but the larger options are in short supply. In addition, there is also little land in which to spec build further stock (although mostly this activity is restricted to owner occupiers as rents are still not conducive to speculative development from private developers). Units of 50-150 sqm are most popular. An enquiry has recently been circulated for 20,000 sqm of industrial space. Whilst this demonstrates a good level of demand for the area, there is currently nothing to satisfy it with. Design and build options are to be relied on, but there is little space on which to build and nothing prominent upcoming.</p> |
| Central Lancashire agent | <p><i>Preston</i> Tustin have recently launched an industrial scheme at Red Scar Industrial Estate which is was 40 percent pre-let and is achieving £6.50/sqft for units up to 200 sqm. These recent deals demonstrate a reasonably strong local market.</p> |
| Local Manager | <p><i>Manage Orvia schemes across South Ribble</i> The 1,200 sqm of industrial space, in 71 units, managed by Orvia is 64 percent let by floorspace and 68 percent let by units. This is reduced from 71-76 percent a year ago. There remains good demand for grow-on industrial space across the Borough.</p> |

Source: BE Group, 2017

4.29 Table 27 provides a summary of the comments received on the local office property market.

Table 27 – Property Market Comments – Office

| Contact | Comment |
|--------------------|--|
| National Developer | <p><i>Central Lancashire Wide</i></p> <p>Central Lancashire has seen no rental growth since 2009, with no more than £14/sqft possible even in the best out of town schemes and Preston City Centre. Demand is for smaller suites and anything over 500 sqm struggles, even in Preston City Centre.</p> <p>High build costs, against static rents mean that it is not viable to develop new offices at present and demand generally does not support large scale delivery of new premises.</p> <p><i>Chorley</i></p> <p>Feel that Town Centre office uses are not desirable or viable at present, as evidence it notes the former Tenon office, adjacent to the Town Hall, which has been vacant for some three years. Generally, local demand is being lost to Buckshaw Village and schemes along Euxton Lane.</p> <p><i>Preston</i></p> <p>Preston City Centre is oversupplied with older, 1960s-80s office stock which is of low quality and attracts high service costs. Rents rarely exceed £9/sqft. The release of several LCC properties over recent years has also oversupplied the market.</p> |
| National Agent | <p><i>Preston</i></p> <p>Preston has proven to be a popular location amongst occupiers, enquiries strong during spring/summer 2017. In Preston, the most popular configuration is 2-4 person suites, up to 50 sqm. Generally, these will be marketed at £10/sqft (Albert Edward House, Ashton-on-Ribble is an example of this), but rates of up to £15/sqft could be expected towards the City Centre.</p> <p>There is currently enough stock of good quality serviced office space – especially in the City Centre and outskirts, which is the focus of enquiries. There is consistent interest in smaller, start-up offices.</p> <p>Preston is perceived as a good place in which to work for small businesses. The City provides the feeling of a ‘small-big city’ with rents at an advantageous, lower level than Manchester. For this reason, there appears to have been an influx of accountants, solicitors and other professional services searching for space in Preston.</p> |
| National Agent | <p><i>Chorley/South Ribble</i></p> <p>Chorley is a local focus for the office market while South Ribble has strengths in industry. Ackhurst Park is indicative of top end supply, achieving £14.50/sqft on a traditional leasehold basis – 3/5 year leases. In comparison, schemes in Leyland/Farington rarely achieve more than £11/sqft and often go lower to attract new tenants.</p> <p>Good demand for a mix of suite types in Chorley – from traditional to fully-serviced (which achieve £20/sqft or more). All suites go quickly however, especially smaller suites for professional services – accountants, solicitors, etc.</p> <p>Larger spaces will take longer to let. However, it is normal to expect the disposal of space within 12 months or so. Space at Ackhurst Park generally goes a lot quicker.</p> |
| Regional Agent | <p><i>Central Lancashire Wide</i></p> <p>The market is slowly evolving with homeworking/remote working impacting on space needs. As a result, the largest occupiers are consolidating space rather than looking to grow, releasing satellite offices and condensing into a</p> |

| Contact | Comment |
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| | <p>single large property. General demand is for 200-300 sqm suites, mostly leasehold. But generally sufficient stock to meet needs, for another decade or so. Rents range from £6/sqft up to £10/11/sqft for the best Grade B stock in Preston City Centre.</p> <p><i>Preston</i></p> <p>Preston City Centre is oversupplied with older stock, but the Docks area is performing well. Speculative development remains unviable, however. Preston City Centre requires some investment in new stock but rents do not support Grade A provision. Some large property requirements may emerge in the medium term as several large City Centre financial services businesses are currently in low grade stock. Not clear if they will stay in the City Centre thought, rather they may seek larger offices at the Docks, North East Preston or Buckshaw Village, to benefit from available premises and better parking options.</p> <p>Preston City Centre has seen some older buildings converted for flats, but the lack of city centre living has minimised the impact of this.</p> <p><i>Chorley</i></p> <p>Local market only, except for Buckshaw Village. Most demand is for suites of 50 sqm or less and larger premises struggle to let.</p> <p><i>Serviced Offices</i></p> <p>Healthy demand for serviced space across Central Lancashire, e.g. Regus at Preston Docks is at 90 percent occupancy. Expect Regus to seek another business centre site in Preston City Centre.</p> |
| Regional Agent | <p><i>Preston</i></p> <p>Have observed moderate levels of interest for decent, refurbished City Centre space. Suites of up to 40 sqm are popular with rents of around £10/sqft being achieved</p> |
| Central Lancashire agent | <p><i>Central Lancashire Wide</i></p> <p>Feel the Central Lancashire office market has diminished over the last two years – with Preston, South Ribble and Chorley presenting the same issues. This is despite generous incentives being offered and reducing rental levels. Supply is meeting demand in all areas.</p> <p>Rents are £12-15/sqft for modern space, but more likely to achieve £10/sqft for secondary – this is true across all areas</p> <p><i>Preston</i></p> <p>Preston should be under a constant churn of new developments, but rent levels at present are not inspiring any new build property. The City lack a 'Grade A' offer which might attract regional requirements.</p> |
| Local Manager | <p><i>Manage Orvia schemes across South Ribble</i></p> <p>Orvia's 3,800 sqm of office space, in 119 units, is presently 66 percent let by floorspace, 64 percent let by unit numbers. These are down from around 71 percent a year ago</p> <p>Demand for its space comes from local businesses, and after solid demand growth over 2013-16, requirements and occupancy have dropped off somewhat since then. The strongest demand is for 1-7 man offices of up to 73 sqm.</p> <p>However, most requirements come from established micro businesses rather than true start-ups. Most start-ups are home based and only start</p> |

| Contact | Comment |
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| | looking for space after trading for 2 or more years, when (if they are successful) they might start expanding and hiring new staff. Also, a lot of start-ups are 'Lifestyle Business' i.e. sole traders who only operate on a part time basis. Such businesses will probably never grow or require space. If there are gaps, it is for supported grow-on accommodation. Such space would provide a limited range of services aimed at improving business survival rates past the 2 year period (when up to 80 percent of businesses fail). |

Source: BE Group, 2017

- 4.30 Stakeholders report a lack of readily available employment land across Central Lancashire. Land at Buckshaw Village has been lost to housing, Moss Side Test Track, Leyland has infrastructure issues. Walton Summit also has no direct growth options at present. Investment also required to open up land at North East Preston. Development at the Cuerden Strategic Site will be key for meeting needs at the larger end of the market, particularly for logistics, but there is a lack of opportunities for micro-mid-sized businesses. However, despite some speculative delivery at South Rings, Cuerden; Matrix Park, Buckshaw Village and Red Scar, North East Preston rental values remain an overall barrier to speculative development, and most delivery is for design and build or pre-let/pre-sold space. It is hoped that continuing growth in rents/prices, for industrial space at least, will encourage development within a three-year timeframe.
- 4.31 Stakeholders also report a very strong industrial market with shortages for all types and tenures of premises. The key market areas are North East Preston and Walton Summit/Moss Side, South Ribble. Leyland/Farlington and Buckshaw Village are also highlighted. North East Preston and the South Ribble/Buckshaw locations operate largely independently, i.e. requirements are generally for one or the other. Local requirements are in the 0-1,500 sqm range but needs up to 4,000-5,000 sqm are reported. Average rents are £5-6/sqft, with the best quality space achieving £6.50 (and a small number of high grade light industrial options achieving £8-10/sqft). Average sale prices are £60-70/sqft although recent, new build, micro business space has been achieving £115/sqft. Consistent rents of around £7.50/sqft or values of £100/sqft, or better, are needed before new build spec development becomes viable though. Some stakeholders report that freehold demand is exceeding leasehold at present although there is a general need for both freehold and leasehold options.

- 4.32 Opinion was more varied on the Central Lancashire office market. The broad view was that Preston, and to a lesser degree Chorley did have reasonable, local scale, office demand. Key comments for Preston were:
- Reasonable market for smaller suites, mostly of 50 sqm or less, and nothing exceeding 500 sqm
 - Rents of around £10-12/sqft are achievable generally, rising to £15/sqft in the City Centre
 - Some schemes, particularly those offering micro-business space (serviced or unserviced) are performing well, but the City Centre generally is oversupplied with older stock
 - At the larger end of the market, Preston is by no means unattractive to inward investors, with a property offer far more affordable than Manchester's. However, the City lacks the Grade A offer required to make it more strongly competitive, while achievable rents are still below the levels required to support investment in such space
 - In the short-medium term a range of large requirements are expected from existing major City Centre occupiers looking to upgrade their premises. Such companies will not necessarily stay in Preston City Centre but rather may seek more flexible options at Preston Docks, North East Preston or even Buckshaw Village. If this is indeed the case it may result in some large City Centre voids, which are hard to fill.
- 4.33 Chorley has a successful, local scale market for professional services, with Ackhurst Park a key scheme, achieving rents of around £14.50/sqft and demand generally for smaller suites. Ackhurst is close to capacity, but this was not seen as evidence for strong further need for new build offices, and stakeholders were particularly sceptical of prospects to develop a large scale office offer in Chorley Town Centre.

Summary

- 4.34 Nationally, prospects for the industrial and logistics markets are of rising demand, including freehold demand, against a reducing supply. Prime headline rents for industrial units from 2,000-5,000 sqm currently sit at £6-7/sqft in Manchester and Warrington and evidence suggests that other prime North West locations may achieve these levels by late 2017. This is partially due to the slowing in the number of speculative developments, something evident in Central Lancashire, which will inevitably drive prime rents up. Owner occupiers are becoming more prevalent with

the increase in business confidence encouraging firms to expand and review their occupational requirements. This is leading to greatly strengthened freehold demand, but local markets frequently lack the freehold stock to meet needs.

- 4.35 Manchester, and to a lesser degree, Liverpool are office markets of national significance and are benefitting from growth in financial and professional services. Smaller centres such as Preston are seeing increased demand from a broader range of professional services, ICT and business administration sectors. Regional office locations have become primarily pre-letting markets, partially due to the critically low availability of grade A office stock. 2017 is set to see around 230,000 sqm of grade A space complete regionally, the highest volume of development since 2009. However, economic and political uncertainties may see several committed schemes fail to commence, as occupiers, investors and developers put decisions on hold until the shape of the post-Bexit economy becomes clearer. Caution in the investment market will make it difficult for regional cities to get the funding they need for new build schemes unless a portion of the new space can be pre-let before construction begins.
- 4.36 Through the Evolutive database, it is noted that Central Lancashire has received 13,015 property enquiries over the last decade:
- Chorley – Industrial requirements dominate, with most office and industrial requirements for sub-300 sqm units
 - Preston – Again industrial interest is strong, and two thirds of industrial enquiries are for units of less than 900 sqm. 63 percent of office enquiries are for suites of less than 300 sqm, with most seeking properties of 93-300 sqm
 - South Ribble – In terms of industrial enquiries, while around a quarter of enquiries were for units of 300 sqm or less, it is important to note that market interest has been recorded for units in all size brackets up to 2,300 sqm.
- 4.37 In terms of office market activity, Preston dominates. Almost three quarters of deals in Central Lancashire were for suites of up to 300 sqm. Preston has shown further market strength in the 1,001-5,000 sqm range and is the only local authority area to record any deals for premises larger than 5,000 sqm.
- 4.38 Property market stakeholders highlighted the need for further employment land options, although rents and prices are, with some exceptions, still below the levels needed to support speculative schemes. Local industrial demand is for premises up

to 1,500 sqm. Larger businesses are looking for industrial and warehouse units of up to 5,000 sqm and there is an undersupply of premises in all three areas, and for all types and tenures within this size range. Rents for reasonable quality space are at £6.50/sqft although the best light industrial schemes can attract rents of up to £10/sqft.

- 4.39 Local office market demand is more varied, but Preston, and to a lesser degree Chorley, are viewed as having reasonable local markets, mostly for small suites of 50 sqm or less. Rents of around £10-12/sqft are achievable generally, rising to £14.50/sqft in Ackhurst Park, Chorley and £15/sqft in Preston City Centre. While some City Centre schemes are doing well, the overall picture is of an oversupply of secondary options and a lack of Grade A space which would allow Preston to compete for key regional requirements. It is expected that some big City Centre occupiers may vacate older properties for more flexible opportunities elsewhere in Central Lancashire, further increasing the surplus.

5.0 DEMAND ASSESSMENT – STAKEHOLDER CONSULTATIONS

Introduction

- 5.1 This section provides commentary about Central Lancashire, drawn from consultations with the public sector and other stakeholders – primarily the major businesses, major landowners, developers, parish, neighbourhood and town councils. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture.
- 5.2 To protect the anonymity of those contributing to this study, the details of individual public sector, company or developer/owner responses are not repeated in the Main Report. The only exceptions are organisations such as Parish/Neighbourhood/Town Councils which made written representations to this study or where an organisation is referenced in a publicly accessible document such as a planning application/planning consent.
- 5.3 The main colleges and universities of Central Lancashire have also been contacted and details of those discussions are summarised in Section 9.0.

Major Business Comments

Chorley

- 5.4 Large business views of Chorley and Central Lancashire were generally positive, with most highlighting the area's excellent road network, skilled labour force and judging it a good place to do business. None, including those who operate in high tech sectors, reported any recruitment issues. Several companies also indicated they chose Chorley over other Central Lancashire and adjacent settlements due to its good availability of modern office and industrial space. Businesses noted that the Borough Council were supportive in areas of business support and skills. Several businesses were drawn to, or founded, in the Borough due to these factors. In other cases, the Chorley location reflects the more prosaic fact that business owners and senior staff were existing Borough residents.
- 5.5 There are ten businesses whom employ 1,545 staff, with most drawn from a local catchment encompassing Central and West Lancashire. However, that staffing is focused in three large businesses, which employ 250-550 each. Other generally have 10-75 staff.

- 5.6 Six of the ten businesses expressed aspirations for growth although most could not set a timetable for when that may occur. Businesses in industrial, storage and transportation sectors are seeking sites of 0.8-6 ha, for a mix of open storage and design and build development of new production facilities. Those who have begun to search for such sites have been unable to find the land they require in Chorley Borough, to date. One made the comment that land at Buckshaw Village was too expensive for those seeking sites for storage and transportation.
- 5.7 Property requirements are for industrial premises of up to 1,000 sqm and office requirements are for suites of 200-700 sqm. Most companies want to stay in their current locations in Chorley Borough, with a focus on Chorley Town, Adlington, the industrial estates/business parks of Euxton Lane and Buckshaw Village.
- 5.8 Some businesses expressed concerns over the changing national economy and political issues, notably the impact of Brexit on the import-export market but none could yet say definitively how such issues may constrain their future growth.

Preston

- 5.9 The response from Preston large businesses was smaller than for the other two authorities. Never the less, the four companies responding were positive about Preston as a place to do business. The established cluster of large financial services companies in the City remains strong and continues to see steady, year on year growth, in terms of turnover, scale of trading and staffing levels.
- 5.10 Such businesses report no difficulties in recruiting staff with financial services skills, as well as more general call centre staff, from wide catchments which extend across Lancashire and Greater Manchester (although high proportions of their staffing do come from within the City). Parking for their large staff numbers, up to 488, is the main physical constraint reported. One business, a housing association, did report difficulties in recruiting locally for social care and construction roles, although this reflects the realistic supply of appropriately trained labour in catchment the size of Central Lancashire when compared to Greater Manchester or Merseyside.
- 5.11 The businesses are generally in large office buildings and can be flexible about working patterns for their staff, i.e. recruit a lot on a part time basis. Thus, they are still some years away from filling up the space they have and have no immediate property requirements.

South Ribble

- 5.12 Consultations in South Ribble included a return to the 11 businesses contacted in the 2015 Employment Land and Property Study. Only two years have passed so unsurprisingly, the position of many companies has not changed. Most of the companies are continuing to see growth, but that growth is less dramatic than was observed in 2015. A couple of companies have also seen negative changes in their operational circumstances that have limited prospects for growth. Generally, these are the result of national issues, specific to their business sector, rather than problems within Central Lancashire. These specific issues include a cut in social housing rents of 1 percent each year from 2016 to 2020, as required in the National Budget of 2015, which impacts on Housing Association profits. Also increased transport costs in the retail logistics sector. Because of these factors, two companies have surplus space in their operations which are being marketed to other firms.
- 5.13 Four business have ongoing growth aspirations, of which one already has the land it needs to grow under its control. A fifth business has satisfied its needs through merger with another business from outside of Central Lancashire, which will see operations and 18 additional staff brought to Farington, taking up vacant space. The requirements are generally for affordable industrial and warehouse/open storage sites of up to 16 ha. Several voiced the opinion that finding suitable sites within South Ribble and Central Lancashire will be challenging.
- 5.14 The 12 businesses contacted employ up to 2,841 people. Two have reduced staffing levels in the face of a tougher trading environment, but most are continuing to see modest growth of up to 5 percent/year in employment rates. Several companies report difficulties in recruiting good quality apprentices in the construction trade, HGV drivers (although this is a national issue) and steel workers/metal casters. But most have no problems in meeting more general requirements for office, manufacturing and logistics staff.

Key Landowner/Developer Comments

- 5.15 11 developers and/or property and land owners, with holdings in Central Lancashire, have been contacted for this study. Most report that they are seeking to expand their holdings, but through acquisition of second hand space, particularly industrial and warehouse units, rather than new development. This reflects the fact that while demand is strong, rents and values, as noted in Section 4.0, are still not high enough

to support speculative new build schemes.

- 5.16 Where developers/owners are actively marketing land, it tends to be for design and build options, such as those available at Red Scar Industrial Estate, North East Preston. An exception to this is light industrial units of sub 100 sqm each which have been successfully delivered at Matrix Park, Buckshaw Village and at South Rings, Cuerden. As noted in Section 4.0, these have proved highly popular for both freehold and leasehold occupation and have achieved viable development values for speculative schemes, although in practice, most were sold off plan. Further developments of this type are likely, at South Rings and elsewhere, in the short and medium term.
- 5.17 The office market remains broadly challenging. In Chorley, Ackhurst Park has proved a success and is close to capacity. To achieve these however, has required the subdivision of larger suites into 20 sqm unserviced starter units, suitable for new businesses who cannot afford full serviced properties. Further development in this area is unlikely. At Buckshaw Village, the proposed office scheme at Employment Site EP1.13: Southern Commercial has seen good demand but is struggling to achieve the rental levels, around £15.95/sqft, which would encourage the developers to deliver. Delivery through design and build only is thus likely over an extended period. Questions were also raised over the viability of proposed offices in Chorley Town Centre.
- 5.18 An exception to this is the Digital Health Park and related scheme at Employment Site EP1.5 Euxton Lane, Chorley, where delivery is expected to start in 2018. This reflects a joint effort by private partners and Chorley Council, with public grant support and a residential element for cross funding so illustrates how development can be realised but is not typical of activity elsewhere.
- 5.19 Similar trends can be observed in South Ribble, where micro business schemes are generally doing well across all settlements but there is limited need for larger schemes.
- 5.20 Preston continues to have a reasonable office market, focused on the City Centre and the Docks. While the City can attract inward investment, most market activity, particularly in the City Centre is for small suites of around 20-70 sqm each. Thus, micro business schemes are doing well and several large buildings in the City Centre have been sub-divided to benefit from this market.

- 5.21 Against this need however, there remains an oversupply of lower grade space in the City Centre and several owners aspire for regeneration and conversion schemes to residential and retail/leisure.

Sectoral Growth Prospects

- 5.22 In discussions, stakeholders highlighted several key sectors which are felt to have growth potential in Central Lancashire:

- *Automotive* – There is a clear opportunity for the growth of supply chain companies in this sector. At present growth in the North West is being driven by Jaguar/Landover, Halewood which has an active programme to bring 70 percent of its supply chain into the North West area. There is nothing equivalent proposed by Leyland Trucks at present. Leyland Trucks business model also prevents it from being involved in defence industries, which means linkages with BAE are not possible. It is also a rapidly changing market which can leave individual businesses vulnerable. This was evident in South Ribble recently with Torotrak’s decision, in May 2017, to cease all operations at Moss Side, Leyland. Torotrak was a diesel engine specialist and the Tier One manufacturers are currently moving away from diesel cars towards hybrid options
- *Aerospace* – The only real competition for the Samlesbury Enterprise Zone at present is the aerospace ‘supplier village’ on the former Michelin site in Burnley (Burnley Aerospace Park). However, it has not developed as such and none of the three companies accommodated on site alongside Safran (Aircelle) is aerospace related. As noted in Section 7.0, the Blackpool Airport Enterprise Zone is unlikely to provide competition in the defence aerospace sector.
- *Food and Drink* – A national growth sector although the skills requirements and value per job generated is usually low.
- *Biosciences and Health* – The North West already has three large bioscience parks at Alderley Park near Macclesfield, in Manchester and Liverpool. However, the Digital Health Village, Euxton Lane, Chorley appears to be proposing a genuinely distinct offer on the ICT facilities associated with the health sector, which has a good chance of succeeding
- *Oil and Gas* – Lancashire’s fracking industry has stalled over the last 18 months due to the international drop in oil and gas prices. Low fuel prices won’t last forever though and once fracking becomes viable again it will

impact on the Fylde Coast and rural northern and western areas of Central Lancashire in terms of production, with support facilities generating industrial requirements.

- 5.23 Stakeholders also identified several sectors with more limited local growth potential:
- *Nuclear* – Central Lancashire has a modest nuclear cluster including James Fisher Nuclear/NW Projects in South Ribble and Toshiba/Westinghouse at Springfield on the edge of Preston Borough. However, this offer is limited compared to that around Sellafield, Cumbria and at Birchwood, Warrington.
 - *Chemicals* – Central Lancashire should not try to compete with the Enterprise Zone facilities at Thornton and the established chemicals cluster in Runcorn
 - *Electrical Engineering* – Growth prospects in this sector are heavily constrained by severe skills shortages
- 5.24 Views on logistics were mixed. On the one hand Waitrose and nearby developments at Revolution Park, Buckshaw Village, and Junction 31(a) M6 have established Central Lancashire as a location for logistics uses. However, B8 sites elsewhere in the North West are coming online, increasing competition. The Cuerden Strategic Site is a strong location for logistics but the scale of land being made available for B2/B8 uses could not support the largest National Distribution Centres, which require up to 20-30 ha of land each to accommodate.

Parish/Neighbourhood/Town Councils

- 5.25 All the Parish, Neighbourhood and Town Councils in Central Lancashire have been contacted by letter. Many have not responded with any issues with respect to the economy or the employment land and property market. Relevant comments provided are summarised in Table 28. Generally, these supported the use and protection of existing employment sites and employment areas for B-Class use, along with several proposed retail/leisure facilities such as the Cottam Hall Brickworks Scheme, Ingol, Preston. No completely new sites were put forward for B1/B2/B8 uses, however. Others raised concerns over wider road infrastructure, including congestion at Junction 31a, M6, and proposed housing numbers which are not directly relevant to this study.

Table 28 – Parish and Town Council Comments

| Council | Comment |
|---|--|
| Chorley | |
| Anderton Parish Council | <p><i>“... Anderton is a relatively rural area and is situated adjacent to the southern border of Lancashire with Greater Manchester. As a parish council we have tried to maintain a policy that the area should largely act as a green buffer zone to delineate between the two administrative regions. We believe this position is supported by the current Chorley borough Local Plan. Consequently, we would not envisage or favor any significant change of local land use for further employment purposes.</i></p> <p><i>We are not aware of any demand from our residents for more locally based employment. It is worth noting that our adjacent neighbouring areas to the north and south (Adlington and Horwich respectively) both offer significant employment opportunities within a relatively short travel distance.</i></p> <p><i>We do have one small industrial estate within Anderton, situated at Grimeford village, which contains several small businesses and possibly has the potential of further employment development. However, at the present time we understand that the site is fully occupied and, as the estate is in private ownership, we are unaware of the owner’s future intentions or plans.”</i></p> |
| Bretherton Parish Council | <p><i>“...the Parish Council would not wish to see any commercial/industrial in the area as significant problems are already being caused by HGV vehicles, which would only be exacerbated if additional vehicles needed access to sites.”</i></p> |
| Preston | |
| Grimsargh Parish Council | <p><i>“...Grimsargh has a few industrial/employment type areas close to the village. In particular the one at Roman Way/ Red Scar is really underutilized with it only being around 20% - 30% used. It does seem run down and not particularly attractive to businesses so some visual improvement and upgrading is probably needed here. We do not think we need to build any more purpose built industrial estates due to the fact that the ones we have are not fully used.</i></p> <p><i>It is a good idea to locate industrial estates close to the motorway and have good access for traffic. However, the industrial estate at Bluebell Way close to Grimsargh and also on the M6 Junction 31A is gridlocked on a daily basis (Monday to Friday) with traffic backing up into the village for at least an hour and a half - this is having a detrimental effect on attracting new businesses to use the local industrial estates as it takes so long to drive a short distance. Proper infrastructure needs to be in place with ways of dealing with traffic to ensure businesses can operate quickly and efficiently. There needs to be an overall vision that shows how all these things work together.”</i></p> |
| Ingol and Tanterton Neighbourhood Council | <p><i>“It was resolved that a response should be made to reiterate and support the Preston Local Plan in that open space in the neighbourhood should be protected from unwanted development since it provides an attractive area which helps to attract employers and employees to come to the area and support the local economy.</i></p> <p><i>It was also resolved that a response should be made supporting the [Cottam Hall] Brickworks development as a local centre since this was in the interests of supporting the well being of residents and the local economy.”</i></p> |
| Whittingham Parish Council | <p><i>“Members considered employment opportunities within the Parish and noted that there were units at the Sandbank Estate and Ashley Hall. In addition, planning permission has been granted for a new Aldi which will create 40 full time jobs and there will be 9000 sqm of employment/light industrial space at the former Whittingham Hospital site creating 350 / 500 full time jobs.</i></p> <p><i>Concerns were expressed that Longridge has been identified as a key service centre which is attracting new homes but no employment opportunities.</i></p> <p><i>Members RESOLVED to respond to the consultation with the above points including a specific request that BE Group consult with Ribble Valley to establish what employment opportunities are being provided in Longridge.”</i></p> |
| Woodplumpton Parish Council | <p><i>“Members considered employment opportunities within the Parish and noted that apart from the units at Rosemary Lane, opportunities were restricted to farming, small</i></p> |

| Council | Comment |
|------------------------------------|---|
| | <p><i>rural outlets such as nurseries and farm shops, pubs and the leisure industry.</i></p> <p><i>Members reiterated their concerns that 5,000 homes had been 'planned' in the parish but currently there is no sign of the supporting infrastructure in the shape of shops, retail outlets, medical provision or schools – all of which will provide employment opportunities.</i></p> <p><i>In addition, when the housing land was allocated in the Core Strategy, it was stated that the homes were necessary to support jobs to be created within the Lancashire Enterprise Zone – so instead of a land study to identify more employment sites and premises, the study should be investigating a) whether there is still a need for 5,000 homes if jobs are not being created in the Enterprise Zone and b) how and when the supporting infrastructure will be provided in NW Preston for the homes currently under construction."</i></p> |
| South Ribble | |
| <p>Little Hoole Parish Council</p> | <p><i>"Little Hoole Parish Council, has, in the past, been pleased to take part in consultations concerning the Central Lancashire core strategy and South Ribble Borough Council's Local Plan.</i></p> <p><i>Since these consultations, a major development at the redundant Leyland Motors test track has been agreed. We support this and also development in the triangle of the M6, M65 and M61.</i></p> <p><i>Most of the area associated with Little Hoole is agricultural, and should remain so, even if employment opportunities are limited. As we are affected by other villages in the Western Parishes, we believe that following the extensive developments in the last ten years, any further development in these areas should be severely restricted.</i></p> <p><i>We consider Walmer Bridge to be enclosed within a Village Fence, lying in a protected Green Belt.</i></p> <p><i>The building of residential properties within the Parish was completed some time ago.</i></p> <p><i>In respect to any further employment development, we would look towards the Longton Business Park, which lies within Little Hoole Parish. This site has seen noticeable development in the last five years and may be available for further development of a suitable nature.</i></p> <p><i>Recently, South Ribble has been designated the best place to live in the UK and rightly so. No doubt it was helped by only being formed in 1974 and virtually with a clean sheet to plan its development. Basically, rural in nature, with a strong Green Belt policy, it has not suffered from either under development or over development and that is as a result of sound planning.</i></p> <p><i>We certainly believe in progress, which is defined as moving forward in a desirable, favourable and rewarding manner."</i></p> |
| <p>Penwortham Town Council</p> | <p><i>"Whilst Penwortham doesn't have a great deal of employment land within its boundaries the sites that are in existence the Town Council would like to see afforded some protection. These sites are:</i></p> <ul style="list-style-type: none"> <i>• Factory Lane Employment Site</i> <i>• The units to the rear of Penwortham Fire Station</i> <i>• The units to the rear of St Mary Magdalen's Primary School</i> <i>• Pristine Car wash</i> <i>• The currently unused MOT garage on Leyland Road</i> <i>• The farm type businesses on and around Howick Cross Lane and Townley Lane</i> <i>• The farm type businesses on and around Moss Lane, Bee Lane, Pickerings Farm, Penwortham."</i> |

Source: Central Lancashire Parish, Neighbourhood and Town Councils, 2017

Summary

- 5.26 39 key businesses, associated organisations, and major landowners and developers were consulted on a one to one basis as part of the study.
- 5.27 Amongst the 26 businesses and related organisations consulted there is a reasonable desire for growth, even if prospects are somewhat subdued on 2015, and there is a degree of concern about long term economic conditions in the face of Brexit. Two businesses have actively reduced their staffing and operational holdings since being consulted for the 2015 South Ribble Employment Land and Property Study, although this reflects national, sector-specific issues rather than concerns with Central Lancashire.
- 5.28 Ten businesses aspire for growth and are mostly seeking industrial, warehouse premises of up to 1,000 sqm, offices of 500-700 sqm and storage/operational sites of up to 16 ha. These are requirements which are difficult to meet locally.
- 5.29 Skills and recruitment issues are modest, and it is important to note that key office and high-tech businesses are finding the trained staff they need in Central Lancashire and adjacent locations. Shortages tend to be in the construction sector, more traditional heavy industries and for HGV Drivers, with the latter being a national issue.
- 5.30 Developers and landowners report good demand for industrial space and have a strong desire to acquire more second-hand schemes in Central Lancashire to meet those needs. Viability and rental levels are still a barrier to new speculative development though, except for light industrial units of sub 100 sqm which have been successfully and viably delivered in several locations in South Ribble. More developments of this type are likely.
- 5.31 In terms of offices, micro business suites of no more than 70 sqm are desirable and schemes offering such space have been a success in all three local authority areas. Demand for larger space is more variable and Preston City Centre retains a sizable oversupply of stock. Viability issues make speculative development of offices unlikely, except for specialist schemes such as the Chorley Digital Health Park.
- 5.32 In discussions, stakeholders commented on business sectors which, in their opinion, have potential for further growth in Central Lancashire:
- Automotive

- Aerospace
- Food and Drink
- Biosciences and Health
- Oil and Gas
- Logistics – Although would require greater land commitments than are currently being made to fully realise.

5.33 Central Lancashire's Town, Parish and Neighbourhood Councils were also consulted, and eight responses secured. Generally, these supported the use and protection of existing employment sites and employment areas for B-Class use, along with several proposed retail/leisure facilities such as the Cottam Hall Brickworks Scheme, Ingol, Preston. No completely new sites were put forward for B1/B2/B8 uses, however.

6.0 DEMAND ASSESSMENT – COMPANY SURVEY

Introduction

- 6.1 A business survey has been carried out to establish evidence of local demand for land and property, and substantiate findings in other sections of this study. It also widens the consultation process and provides direct empirical data on the demand for property and land. It is another strand of evidence that is used to inform the study's conclusions and recommendations. Furthermore, the survey is used to gain an insight into the confidence of Central Lancashire's businesses, and the advantages and disadvantages of operating a business in the area.
- 6.2 The views summarised below are the opinions of the representatives of the surveyed businesses at the time of the consultation. They are not the views of the local authorities or their officers.

Methodology

- 6.3 850 Central Lancashire businesses were surveyed by telephone in March and April 2017 – 300 each in Preston and South Ribble, 250 in Chorley. This represents an approx. 10 percent sample of the relevant business stock in each area. The survey comprised of a written questionnaire completed by the surveyor during the telephone conversation. The questionnaire covered basic information regarding the respondent's business premises, questions regarding business performance and confidence, and questions regarding intents to relocate premises. Business details were derived from business databases, including EGi, and Market Locations. The databases were filtered to target businesses types that typically locate in B-Class building stock. The questionnaire is provided in Appendix 2.
- 6.4 As much as possible, the survey was weighted to ensure broad and even coverage across the study area, reflective of the local split of population and businesses. Tables in Appendix 3 show the split of responses, by sub-area, against the numbers sought. As can be seen, with the exception of the North of Chorley Borough (Whittle-le-Woods, Heapey, Clayton-Le-Woods, Clayton Green, Clayton Brook), to a lesser degree Coppull, and South East Preston City, it was possible to get response levels in line with the population split. In West Preston (i.e. Ashton) the number of responses achieved was significantly above that sought, but this reflects the high

business population in, and around, Preston Docks, against the residential population of the area.

Company Size

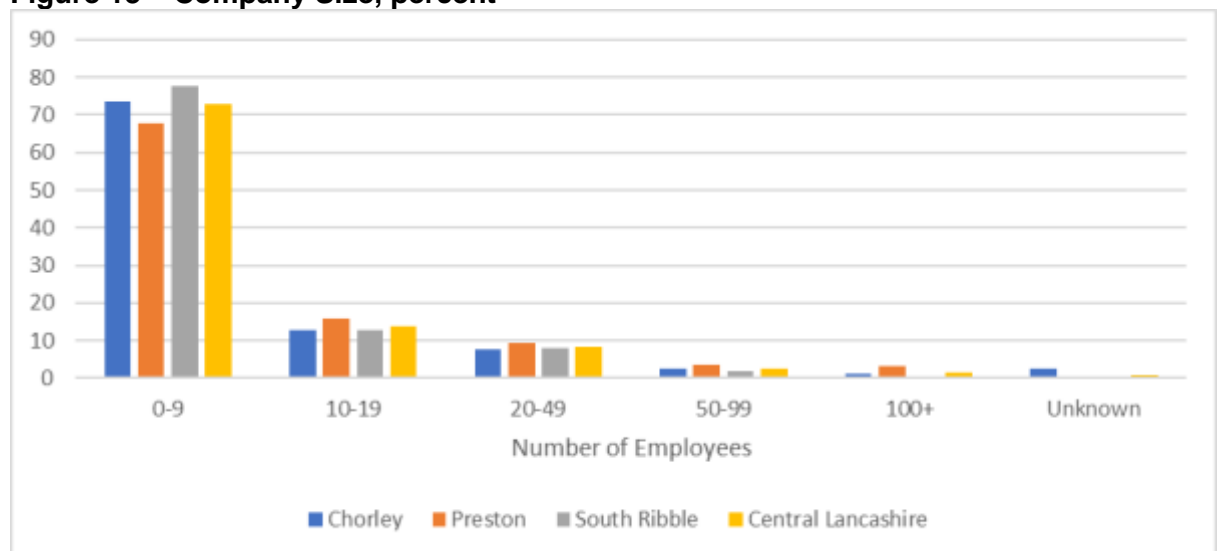
6.5 The 850 companies together employ some 6,430 people, comprising:

- Chorley – 2,564 (39.9 percent)
- Preston – 1,611 (25.0 percent)
- South Ribble – 2,255 (35.1 percent).

6.6 Of these, 3.0 percent are part-time employees – in South Ribble part time employment has a negligible role and just 0.5 percent of staff are part time, in Chorley its 3.7 percent, and in Preston 5.5 percent,

6.7 Figure 13 shows the number of staff for each responding business. The ONS data on business sizes in Central Lancashire presented in Section 3.0 showed that some 87.7 percent of businesses had less than 10 staff and 2.3 percent had more than 50 workers. The survey responses had a slightly different profile, with 72.9 percent having less than 10 workers and 4.1 percent having more than 50 workers.

Figure 13 – Company Size, percent

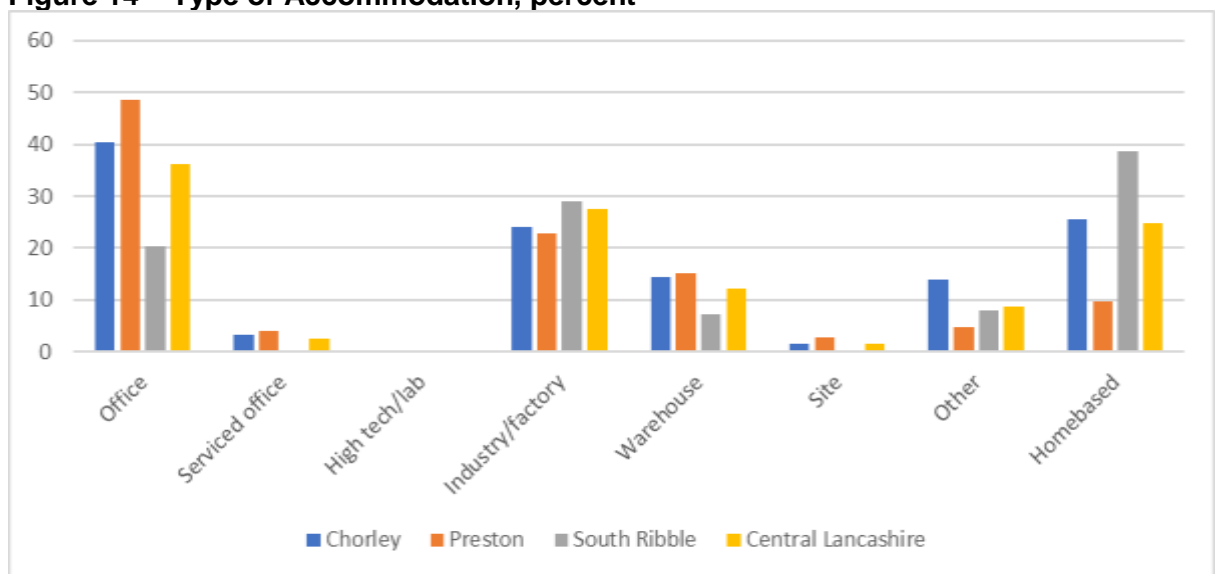


Source: BE Group, 2017

6.8 Most companies in all three areas employ between 0 and 9 people, and few companies employ more than 50. Preston has a slightly larger proportion of companies with 10-19 employees, and slightly less with 0-9 employees. None of the respondents from South Ribble had more than 99 employees.

6.9 Figure 14 shows that just over 38.6 percent of respondents work in an office/serviced office, with significant variation between the three areas – over half of Preston’s respondents (52.7 percent) occupy office accommodation, and just 20.3 percent of South Ribble’s. A slightly higher proportion (39.5 percent) of respondents overall occupy industrial/warehouse premises, with similar proportions in all three areas. A quarter of respondents work from home (212 businesses) – although again this varies considerably between each of the three local authority areas – 38.7 percent of South Ribble respondents worked from home, with a focus on the Borough’s rural areas, compared to just 9.7 percent in more urban Preston.

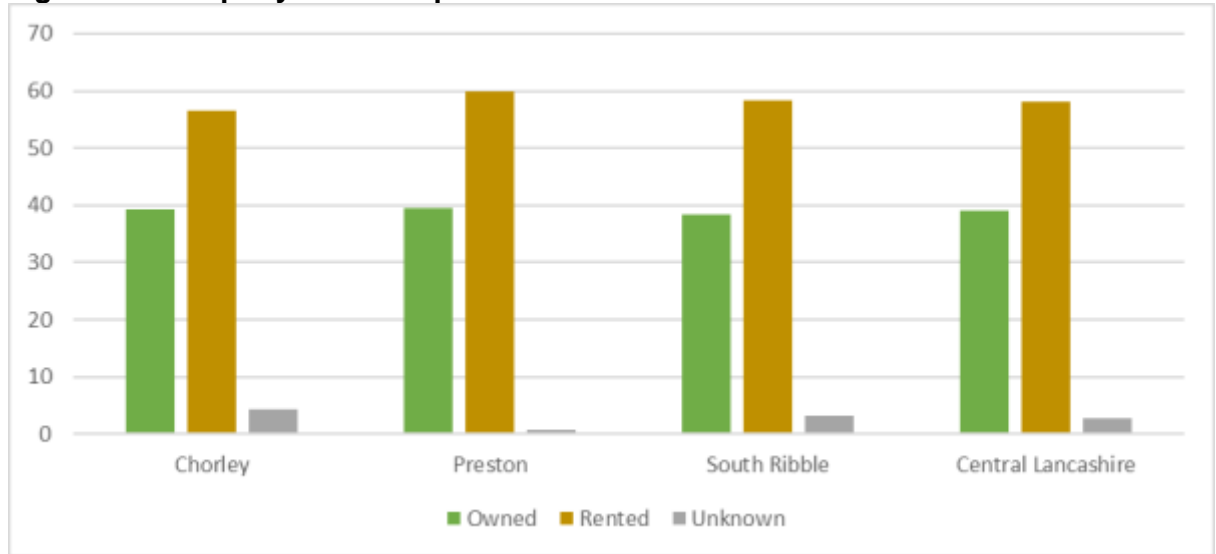
Figure 14 – Type of Accommodation, percent



Source: BE Group, 2017

6.10 Figure 15 shows that of the 638 companies that work from commercial premises, over a third own their property and over 60 percent rent their property (2.8 percent did not respond to this question).

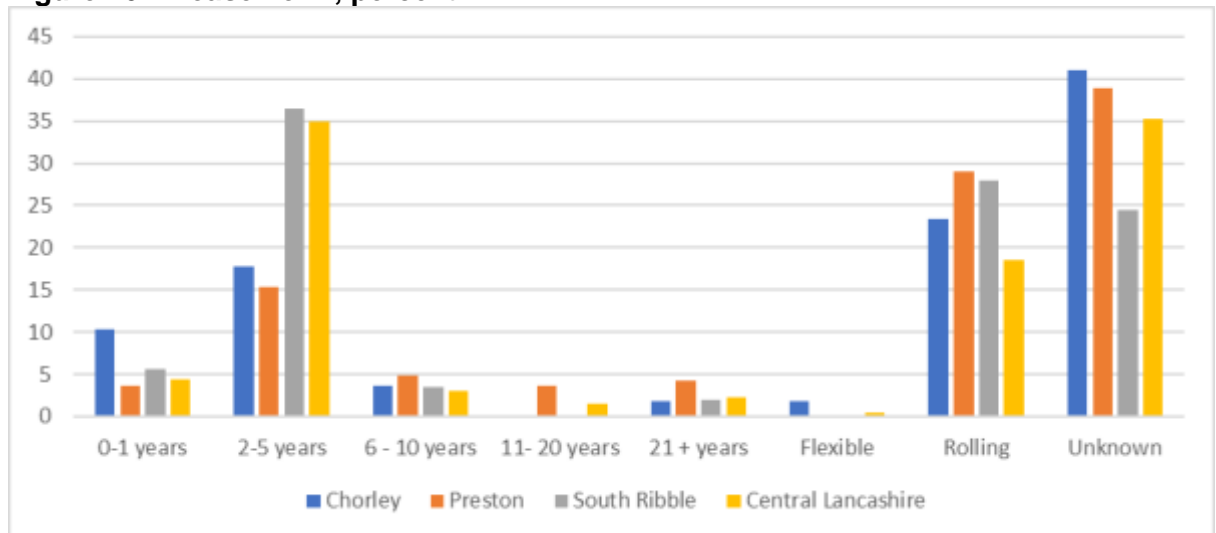
Figure 15 – Property Ownership



Source: BE Group, 2017

6.11 Of the 389 companies that rent their premises, over a third of companies were not sure, or did not respond when asked the length of their lease (see Figure 16). Overall, 35 percent of companies have 2-5 year lease term. A high number of companies reported that they are on ‘rolling’ leases with no set end.

Figure 16 – Lease Term, percent



Source: BE Group, 2017

6.12 Over half of companies occupy 0-200 sqm premises, and just over five percent occupy premises over 2,001 sqm (see Table 29). South Ribble companies occupy slightly larger premises than the other two areas, with noticeably fewer reporting they occupy 0-100 sqm units. This is likely a reflection of the smaller number of office based businesses responding in South Ribble, as office companies would usually be

in smaller premises than their industrial/storage equivalents.

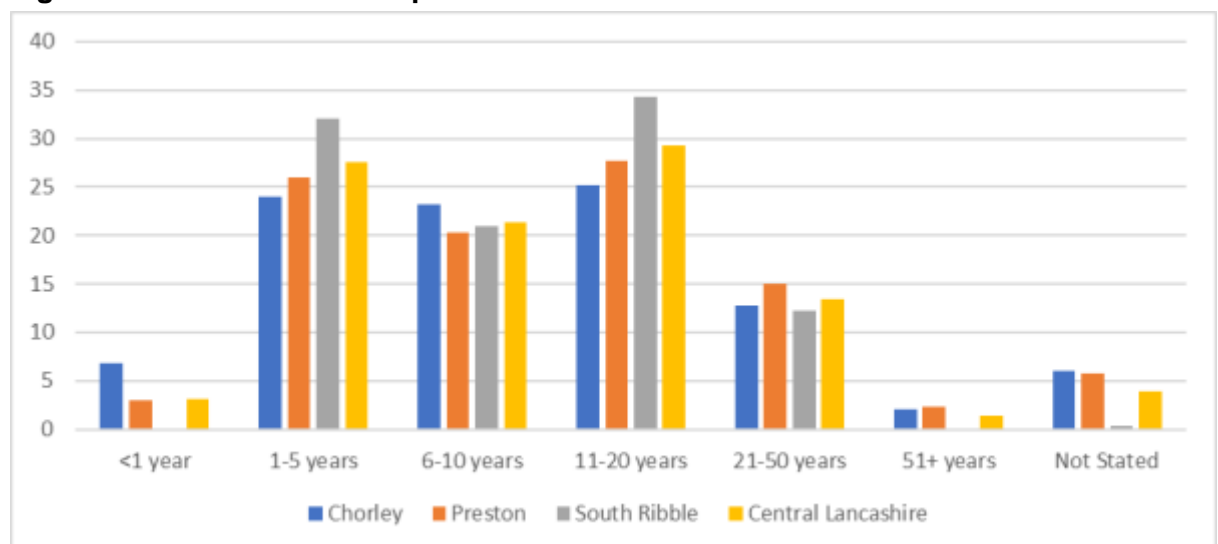
Table 29 – Unit size (excluding home based businesses), percent

| | 0-100 | 101-200 | 201-500 | 501-1,000 | 1,001-2,000 | 2,001-5,000 | 5,001-10,000 | + 10,000 | Unknown |
|--------------------|-------|---------|---------|-----------|-------------|-------------|--------------|----------|---------|
| Chorley | 48.9 | 12.4 | 12.9 | 9.1 | 0.5 | 3.8 | 2.7 | 1.1 | 8.6 |
| Preston | 38.0 | 19.2 | 16.6 | 4.4 | 1.8 | 3.7 | 2.2 | 0 | 14.1 |
| South Ribble | 9.9 | 30.4 | 18.8 | 12.7 | 11.0 | 5.5 | 0 | 0 | 11.6 |
| Central Lancashire | 33.2 | 20.4 | 16.1 | 8.2 | 4.1 | 4.2 | 1.7 | 0.3 | 12.1 |

Source: BE Group, 2017

6.13 Companies were asked to state how long they have occupied their current premises (see Figure 17). The largest proportion of companies have occupied their current premises for 11-20 years, with over half locating there for between six and 20 years. The proportions are similar in each of the three areas, although Preston has a slightly larger proportion of companies that have occupied their premises for over 21 years (17.3 percent compared to 14.8 percent in Chorley and just 12.3 percent in South Ribble). South Ribble by comparison had a high number of businesses indicating 1-5 year occupancy periods.

Figure 17 – Duration of Occupation of Current Premises

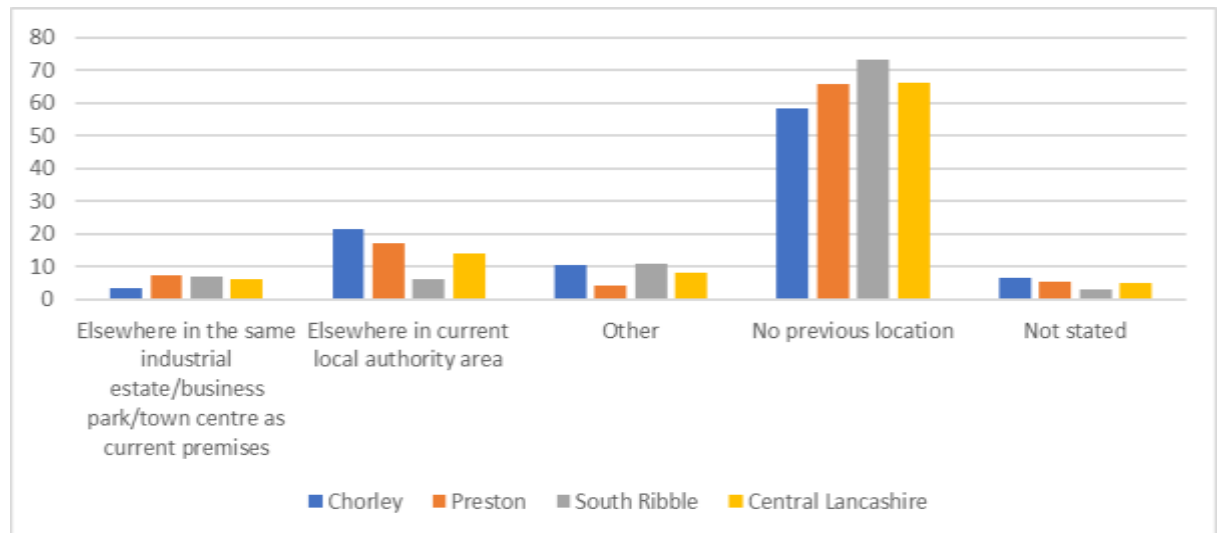


Source: BE Group, 2017

6.14 Companies were also asked about where they had previously been based. Figure 18 shows that two thirds of respondents stated that they had not occupied a previous

location, and 14.1 percent stated that their former location was within the same local authority area. However, this varies amongst the three areas – 21.6 percent of Chorley companies have previously occupied other premises within Chorley, but only 6.0 percent of South Ribble respondents have occupied other premises within South Ribble in the past.

Figure 18 – Previous Business Location



Source: BE Group, 2017

6.15 70 companies have previously occupied space outside of their current local authority location. Several companies have previously occupied space within another Central Lancashire authority – for example four South Ribble companies previously occupied space in Chorley, and three in Preston. Additionally, two Chorley companies were previously based in Preston, and two in South Ribble. One company currently occupying space in Preston was previously based in Buckshaw Village, Chorley and another in Leyland, South Ribble.

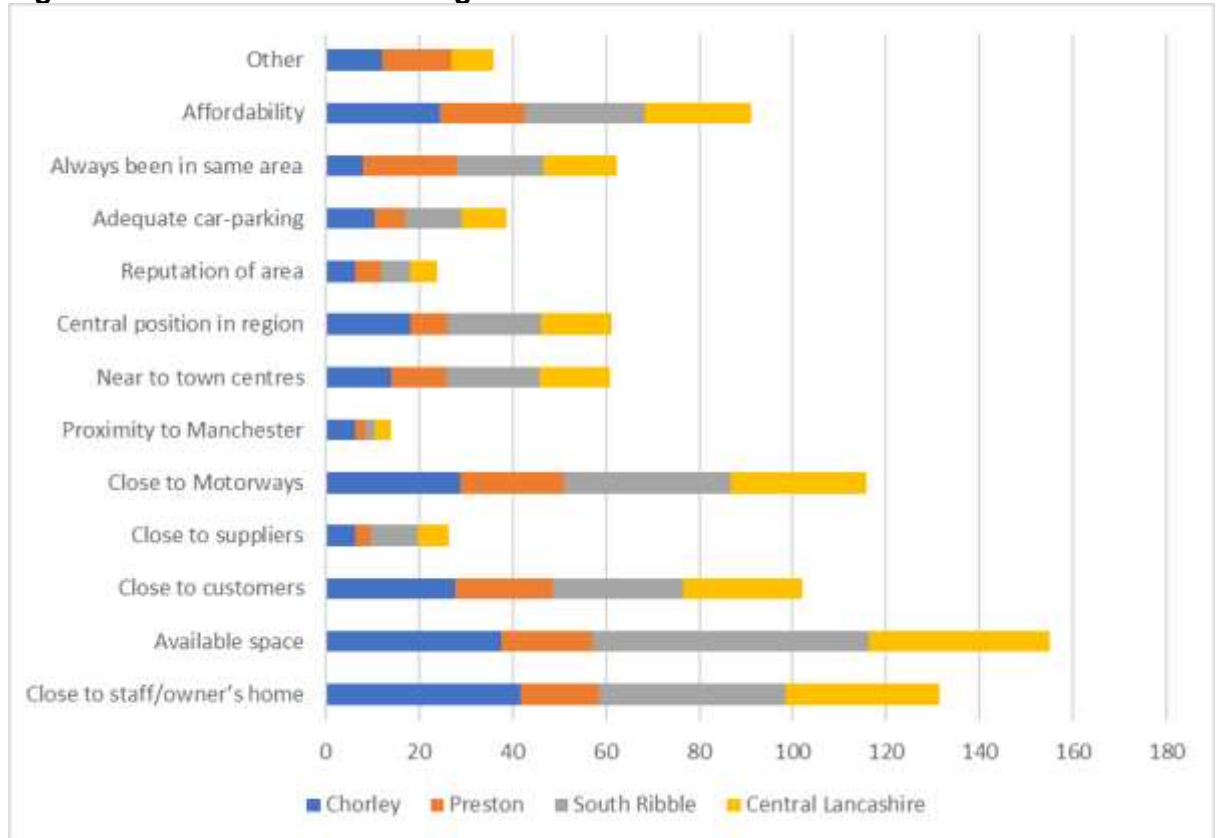
6.16 Other previous locations, outside of Central Lancashire, include other North West settlements such as Lytham St Annes, Blackpool, Blackburn, Bolton, Wigan, Warrington and Southport, and towns and cities further afield such as Leicester, Wolverhampton, Tewkesbury and London.

Current Location

6.17 Companies were asked to state the reasons why they chose to locate within the respective local authority area, and were provided with twelve potential reasons (and asked to state as many reasons as relevant). As Figure 19 shows, the most common reasons that companies give for locating at their current premises is proximity to

customers (25.5 percent), affordability (22.8 percent), availability of space (38.7 percent), and proximity to staff/owner’s home (32.9 percent).

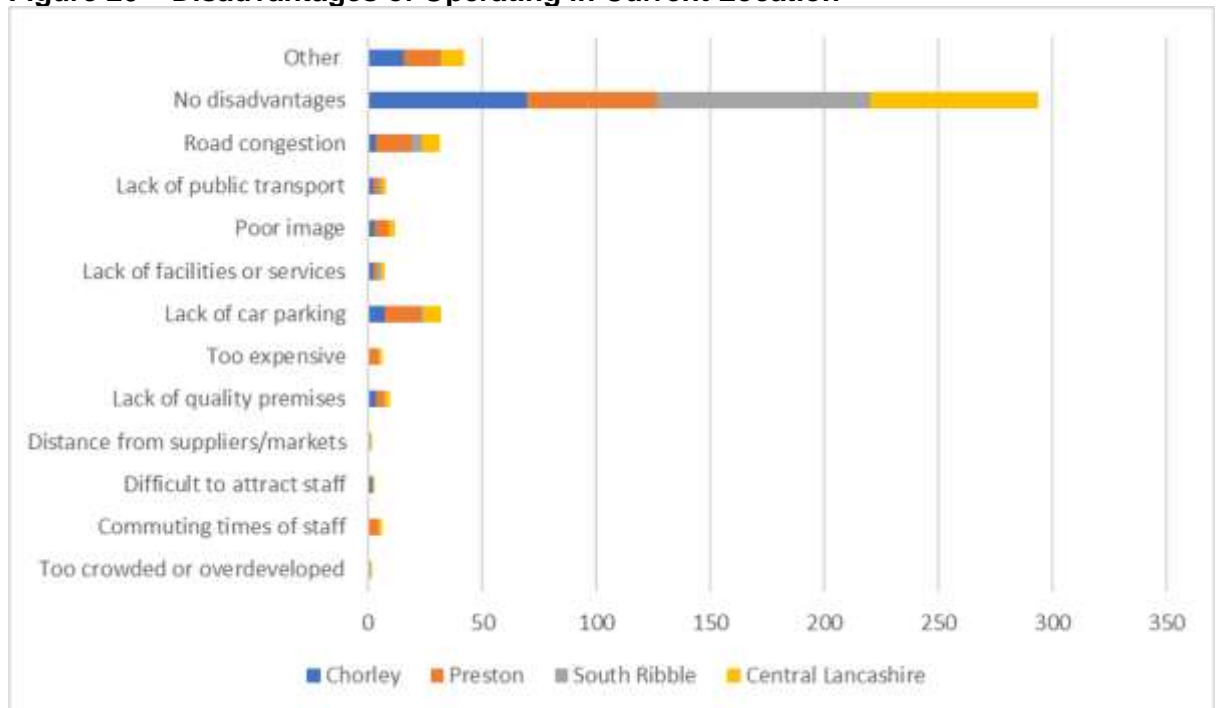
Figure 19 – Reasons for Locating in Current Location



Source: BE Group, 2017

- 6.18 In Chorley and Preston, key reasons provided were proximity to motorways and proximity to customers and staff/owners homes (in the case of Chorley). In South Ribble, available space was also key.
- 6.19 In addition, 75 companies listed additional advantages to locating in the area. In Chorley, this included good public transport links, the availability of good staff, rates relief and good amenities close by. In Preston, additional comments include the area being safe and secure, decent accessibility, and good transport links (including public transport).
- 6.20 Companies were also asked to state the disadvantages of operating in their current location, and were again provided with twelve possible answers. Positively, as Figure 20 shows, nearly three quarters of respondents stated that there aren’t any disadvantages. 69 companies stated that road congestion is an issue, and 68 are unhappy with the lack of car parking (48 of which are Preston companies).

Figure 20 – Disadvantages of Operating in Current Location



Source: BE Group, 2017

6.21 87 companies also provided details of other difficulties they face. In Chorley this includes access issues, particularly relating to the movement of larger vehicles, insufficient broadband speeds and mobile phone signal, and maintenance issues owing to being located within an old building.

6.22 In Preston, other disadvantages include a lack of visibility, neighbour nuisance in terms of nearby nightlife and access issues. No companies from South Ribble noted any additional difficulties.

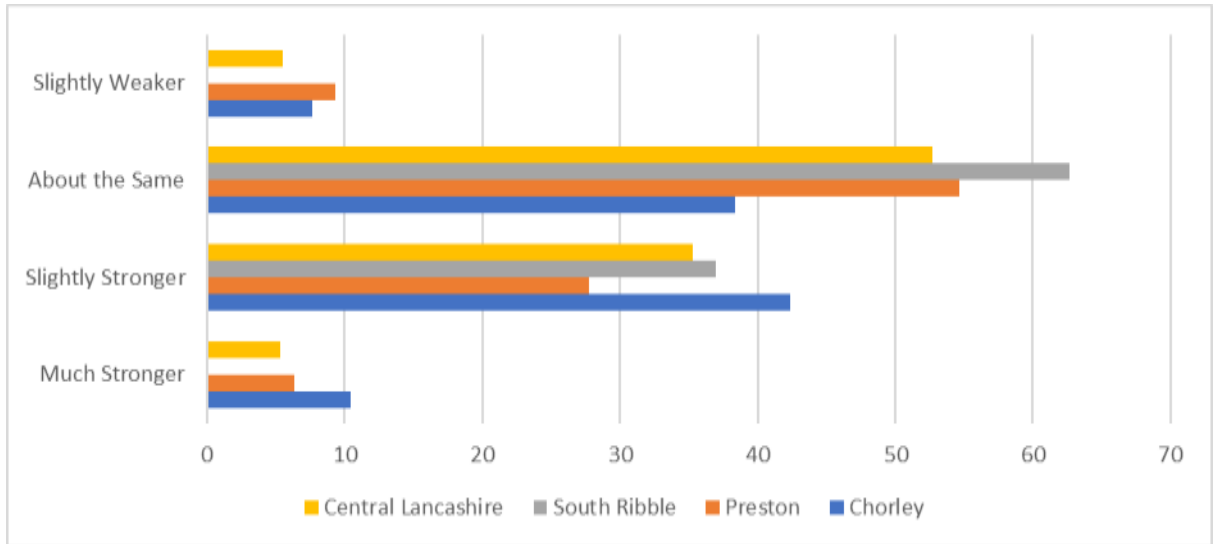
Business Confidence

6.23 Companies were asked how they feel their business has performed in the past 12 months compared to the year previous. Overall, over half of companies feel that their business has performed similarly, and over a third feel their business has performed slightly stronger (see Figure 21).

6.24 Business confidence is particularly strong in Chorley, where over half feel their business has performed either slightly, or much stronger during the past year. While no South Ribble companies felt performance was ‘much stronger’ than previous, the

proportion opting for slightly stronger was reasonable and none indicated that performance has weakened at all. Confidence is slightly lower in Preston, with 10.6 percent noting a decline in the past 12 months.

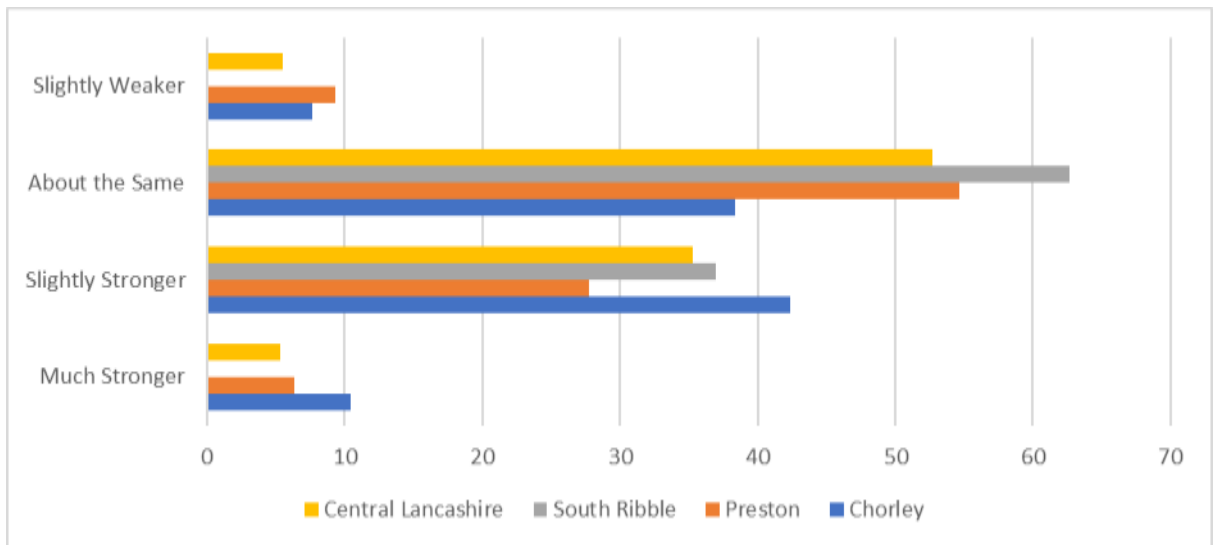
Figure 21 – Recent Business Performance



Source: BE Group, 2017

6.25 In terms of future performance, overall nearly half of companies feel performance will remain unchanged during the next year. Encouragingly, 41.3 percent feel they will perform stronger and just one percent anticipates a decline in company performance. Again, Chorley businesses are most confident, although Preston businesses are only slightly less confident overall, and 12 percent of the responding city businesses felt that future growth would be ‘Much Stronger’. Reflecting their response to the previous question, South Ribble businesses felt that modest growth or no significant change was most likely.

Figure 22 – Future Business Performance



Source: BE Group, 2017

6.26 Companies were also asked to comment upon how they expect several elements to change over the next year (see Figure 23). Optimistically 40 percent of companies expect to see an increase in sales and profitability in the next 12 months (which links to their earlier comments about Future Business Performance being slightly stronger), and a quarter expect to see a slight increase in capital investment. Expectations for employee numbers, and for the demand for and supply of skills are more modest, with three quarters expecting them to stay the same. And whereas over half of companies feel that operating costs will remain the same, 37.3 percent feel that they will increase.

Figure 23 – Expected Business Trends within next 12 months



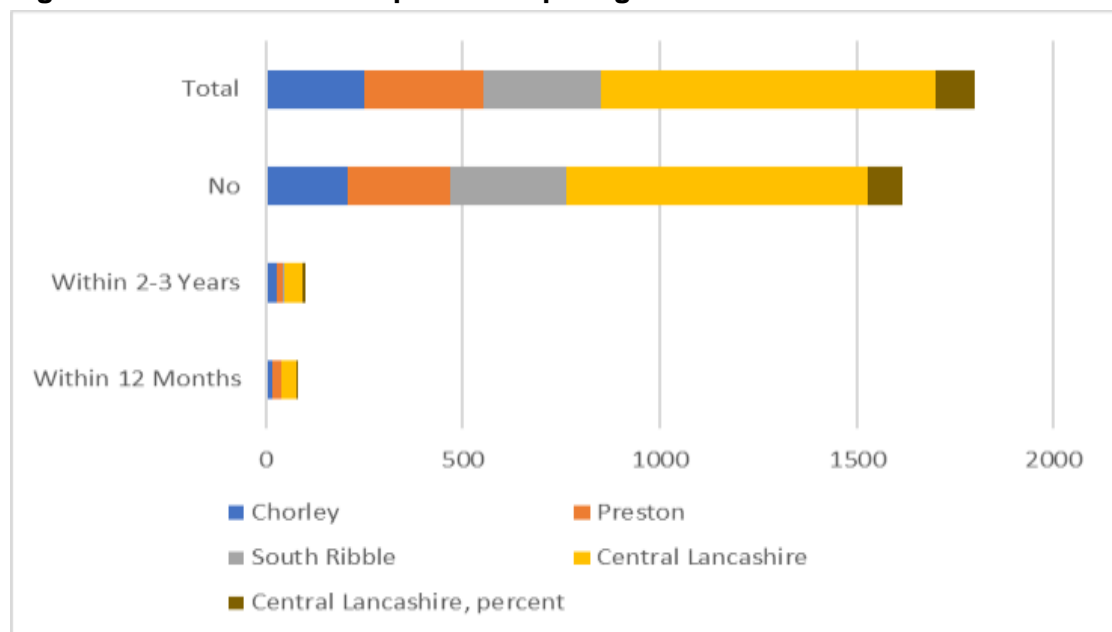
Source: BE Group, 2017

6.27 Overall, South Ribble respondents were most conservative with their expectations, with a larger proportion of companies expecting the varying specific issues within their business to stay the same in the next 12 months. Chorley businesses were again most confident, particularly in terms of sales and profitability, with close to half predicting growth in both areas.

Future Accommodation

6.28 All respondents were asked whether their business had an intention to relocate premises within the coming year or within 2-3 years. 86 businesses are considering moving premises within the next three years – 39 within 12 months and 47 in the next 2-3 years (see Figure 24). Only five of the 300 South Ribble respondents are considering moving premises in the foreseeable future (1.7 percent). This compares to 17.6 percent (44) of Chorley’s businesses, and 12.3 percent (37) of Preston’s.

Figure 24 – Number of Companies Requiring Accommodation



Source: BE Group, 2017

6.29 The low number of requirements recorded for South Ribble is surprising, especially when the 2015 South Ribble Employment Land and Property Study recorded 39 local companies intending to relocate, with 20 proposing that this will happen in 2015/16. Of course, it is likely that many of those companies have now moved, or given up on their property requirements and, in this survey sample at least, have not been replaced by new companies seeking to grow. By comparison, equivalent

requirements have not been met in Chorley and Preston or requirements have emerged somewhat later in these two local authority areas. Economic conditions are also more uncertain today than they were in 2015 which may be discouraging businesses from contemplating expansion/relocation. Certainly, the larger South Ribble businesses re-contacted for this study were less confident about growth today than they were in 2015 (see Section 5.0).

6.30 It is worth noting that when referring to the following tables, percentage values for South Ribble are slightly skewed since they refer to just five companies in total.

6.31 Of the 53 companies who answered the question, most require the new property to be a replacement for their current property, and just six companies are looking for a property additional to what they already have.

6.32 Companies were asked to provide additional detail regarding their future property requirements (see Table 30 and Figure 25). Some key trends worth noting are:

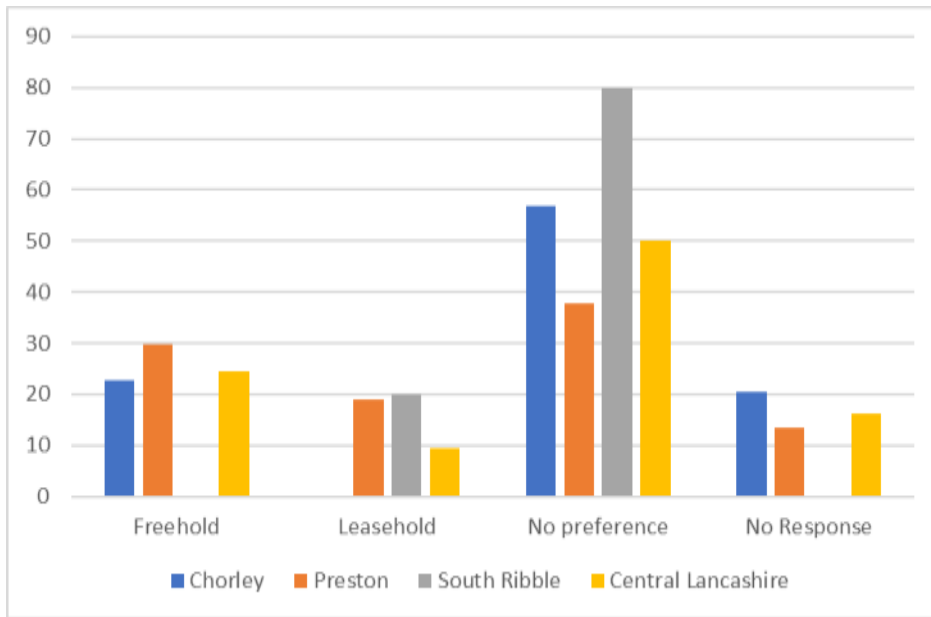
- Roughly equal levels of interest for offices and industrial/warehouse space
- Demand for offices is not higher in Preston than in Chorley, at least amongst this sample of mostly SME businesses
- Modest interest in serviced offices in Chorley and Preston
- The current preference is for freehold rather than leasehold premises. This will reflect the current easy access to finance/low interest rates which are encouraging companies to consider owner occupation.

Table 30 – Type of Accommodation Required

| Workspace Type | Chorley | | Preston | | South Ribble | | Central Lancashire | |
|-----------------|---------|---------|---------|---------|--------------|---------|--------------------|---------|
| | Count | Percent | Count | Percent | Count | Percent | Count | Percent |
| Office | 20 | 45.5 | 15 | 40.5 | 2 | 40 | 37 | 43.0 |
| Serviced Office | 3 | 6.8 | 1 | 2.7 | 0 | 0 | 4 | 4.7 |
| Industrial | 9 | 20.5 | 11 | 29.7 | 3 | 60 | 23 | 26.7 |
| Warehouse | 11 | 25.0 | 5 | 13.5 | 0 | 0 | 16 | 18.6 |
| Land | 1 | 2.3 | 3 | 3.0 | 0 | 0 | 4 | 4.7 |

Source: BE Group, 2017

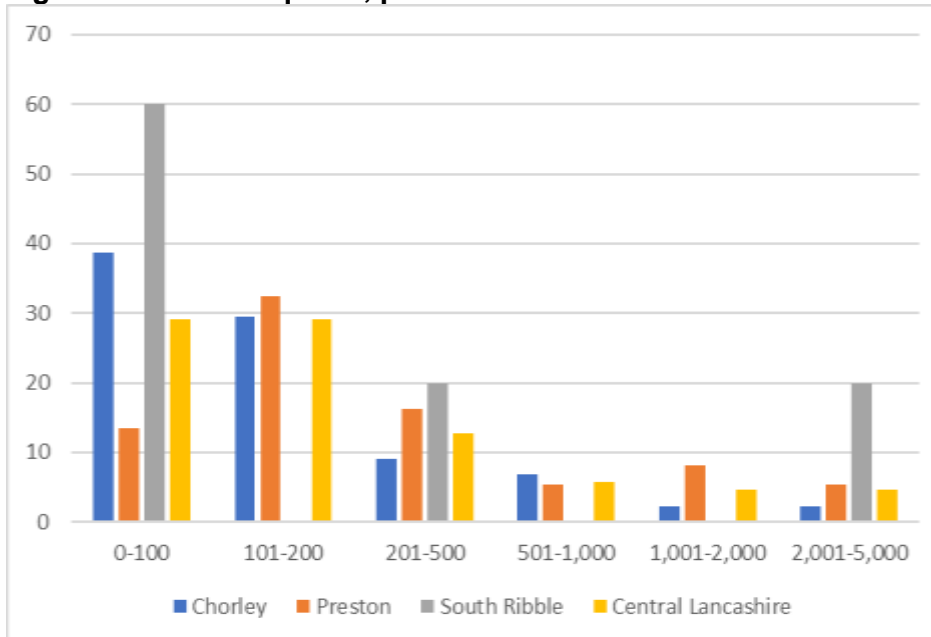
Figure 25 – Tenure required, percent



Source: BE Group, 2017

6.33 Most businesses, of all types, want units of 0-200 sqm, with Chorley and South Ribble companies favouring 0-100 sqm options and Preston ones seeking 101-200 sqm units (see Figure 26). Individual industrial and warehouse requirements extend up to 2,001-5,000 sqm however.

Figure 26 – Size Required, percent

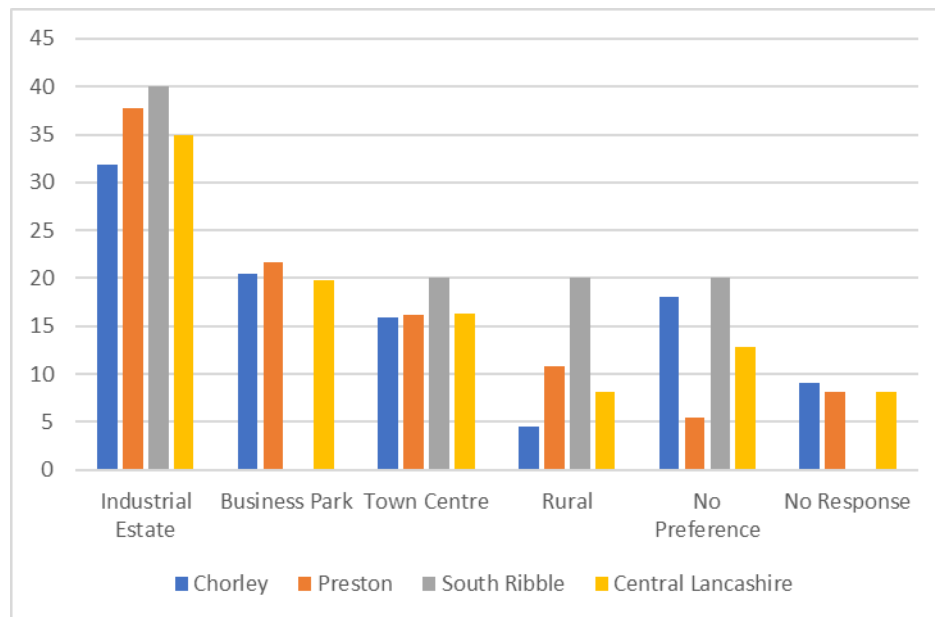


Source: BE Group, 2017

6.34 Companies were asked about what type of location they would prefer to move to (see

Figure 27). In general companies in Chorley and Preston would like to be on an industrial estate or business park, with smaller proportions requiring town centre or rural premises. In South Ribble two companies are looking for industrial estate premises and one each for town centre and a rural location, (the other company has no preference).

Figure 27 – Preferred Location Type, percent



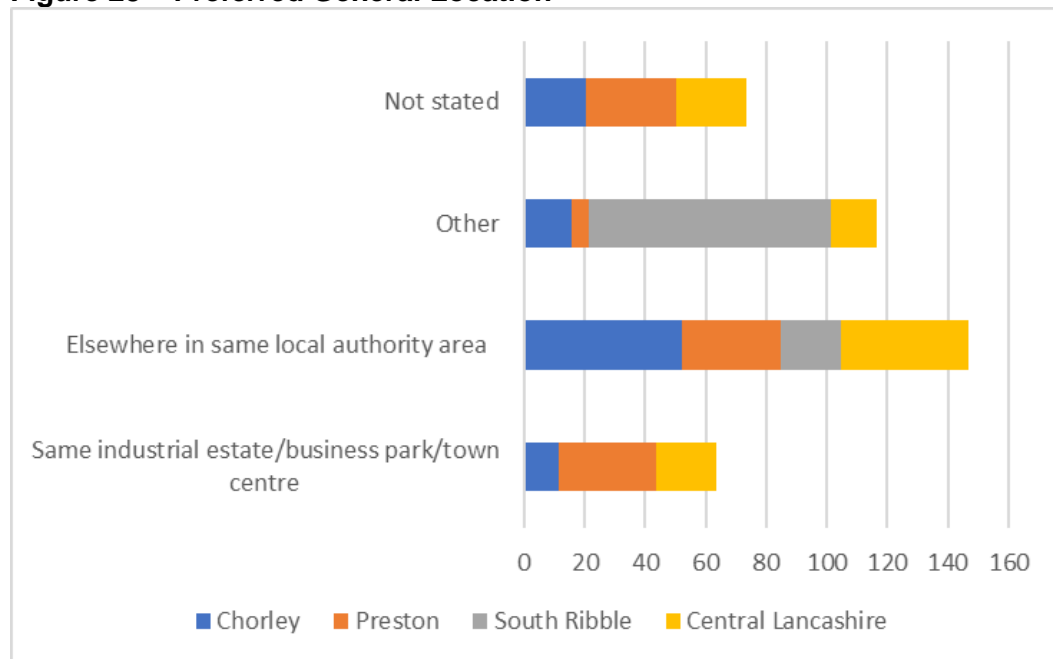
Source: BE Group, 2017

6.35 Respondents were also asked general location preferences (see Figure 28). This differs significantly in each of the three areas. In Chorley, five companies (11.4 percent) wish to stay at the same location, but over half (23 companies) would like to remain in Chorley Borough. Although most companies did not provide more detail for this question, one did state they would like to relocate to Chorley Business Park. Of the seven companies that stated they would move outside of Chorley, two would like to stay in Lancashire (but did not give further detail), one is considering a move to Blackburn and one to Southport.

6.36 Over a quarter of respondents from Preston, that are hoping to move, did not state where they would like to move to. Almost a third would stay at the same location, and a third would like to be elsewhere within Preston. Of the two companies that stated they would like to locate outside of Preston, one would like to locate in South Ribble. Out of the South Ribble companies looking to relocate, one company would like to remain in the Borough, but the remaining four companies would like to locate within

the Preston area.

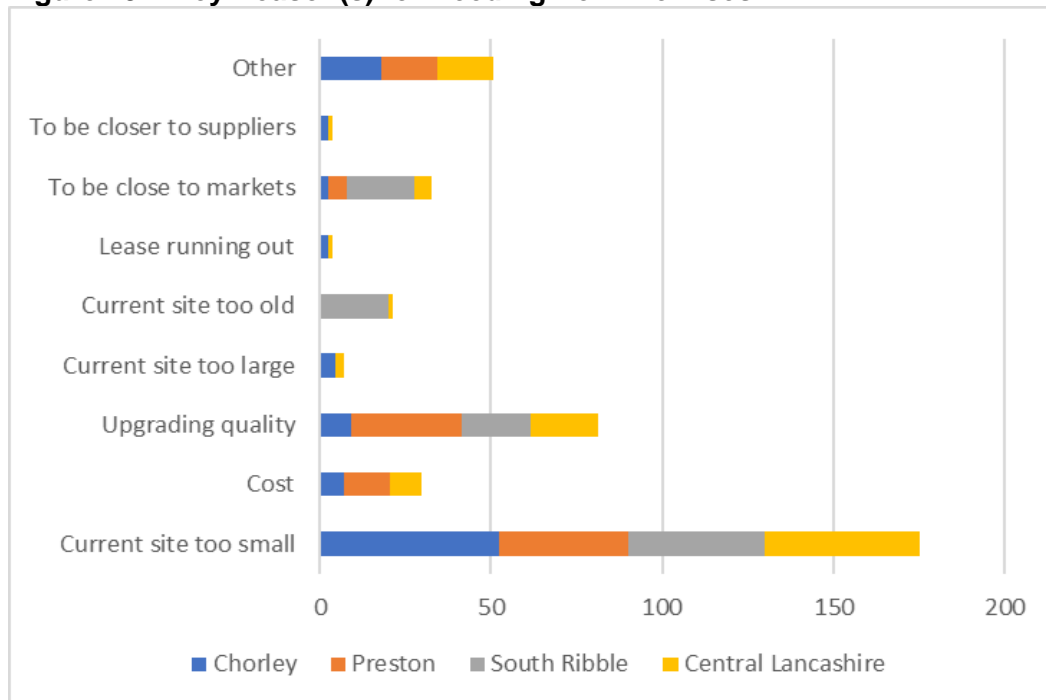
Figure 28 – Preferred General Location



Source: BE Group, 2017

6.37 Companies were asked to provide the key reasons that they are looking for new premises, and were presented with eight possible reasons (see Figure 29). Nearly half of companies are looking for new space because their current site is too small. 17 of 86 companies are upgrading the quality of their premises (12 of which are Preston companies). In addition, 14 companies provided additional reasons for their relocation. In Preston, this includes two companies currently renting but hoping to buy; a steel fabrication company that requires more storage; one company wishing to rebuild their current property into a purpose-built office; and one company wanting to relocate to somewhere with less traffic.

Figure 29 – Key Reason(s) for Needing New Premises



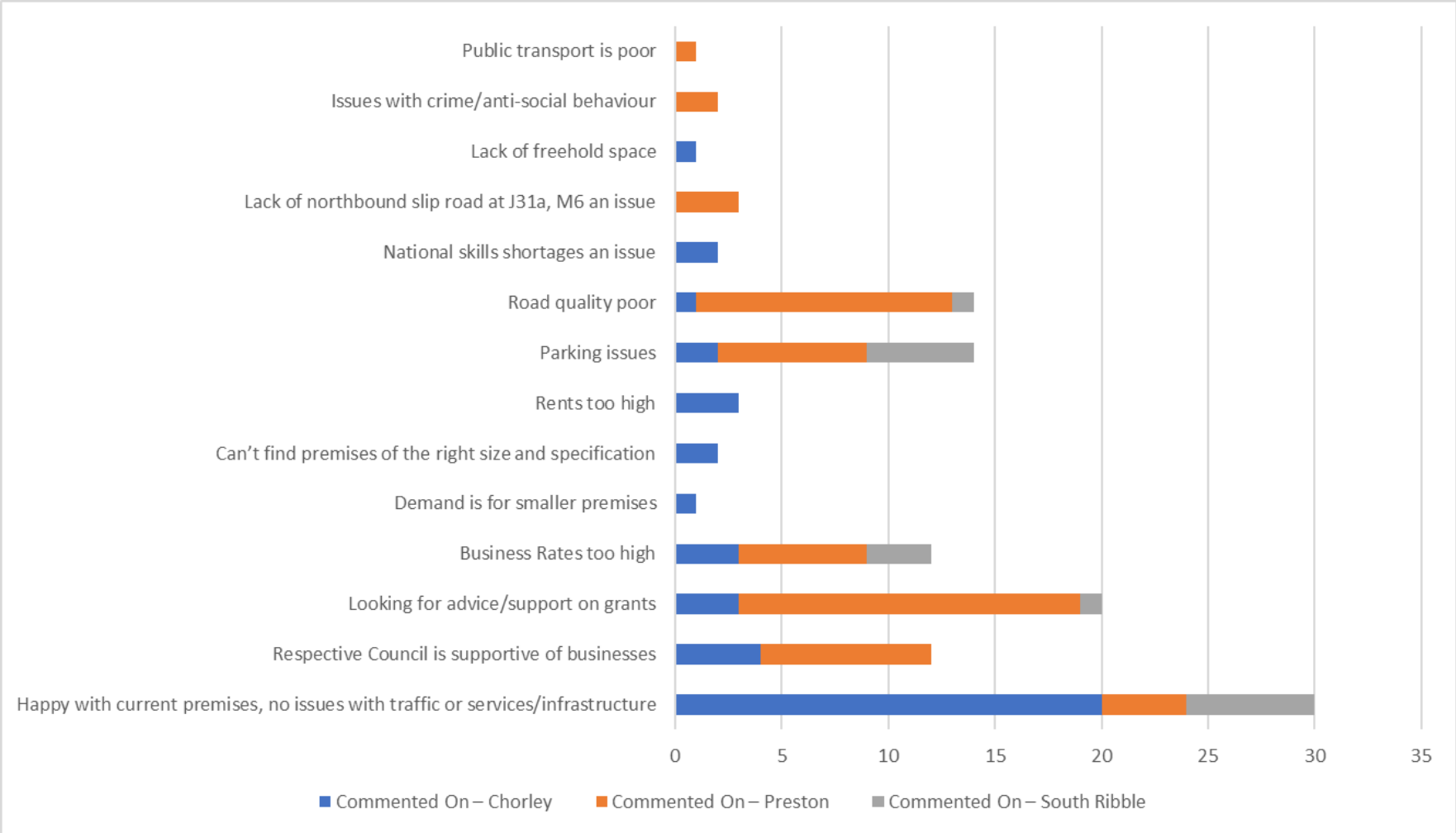
Source: BE Group, 2017

6.38 In Chorley, other reasons include finding a more affordable property with more parking; a cake company that requires larger, more professional kitchen space; a website design company that requires a base to meet clients and a company which is looking to invest in property. South Ribble companies did not provide any additional reasons.

Perceptions/Comments

6.39 Respondents also made additional comments relating to the wider business environment, with some making several comments (see Figure 30). As can be seen, in Chorley many people made positive comments about both the area and the performance of the Council. More negative comments centred around business rates and high local rents. In Preston, 16 businesses are looking for grant support to grow their businesses and invest in infrastructure and skills development. Concerns related to local level issues with parking and the road network. Fewer people made further comments in South Ribble, but those that did again raised local concerns with parking and rates.

Figure 30 – Other Issues

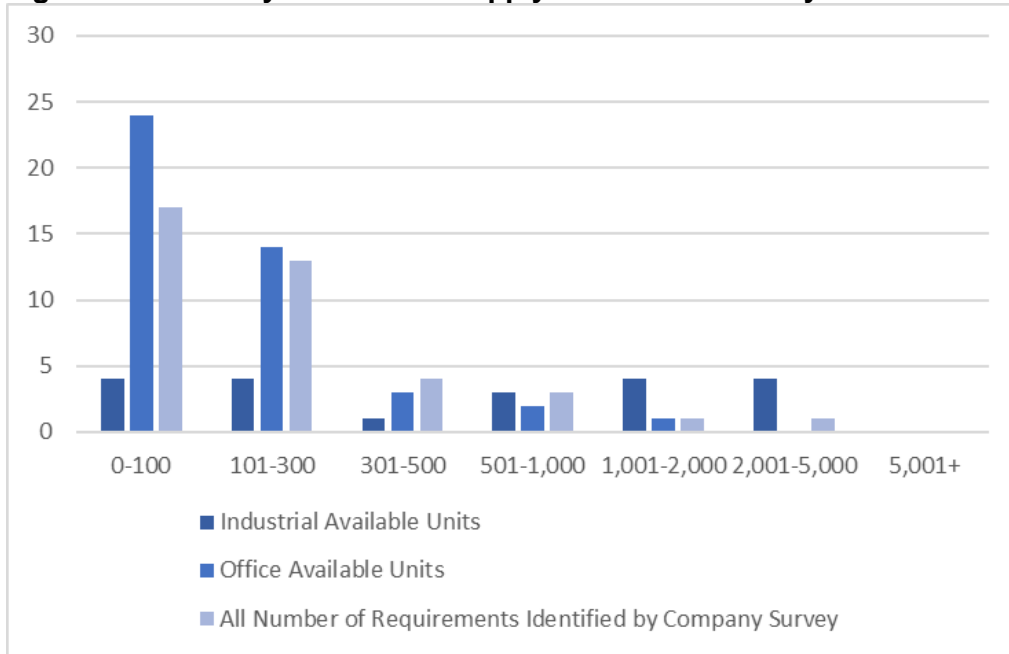


Source: BE Group, 2017

Summary

- 6.40 The survey results reflect the sub region's local economy structure, with responses from industrial companies dominating in South Ribble and office businesses in Chorley and particularly Preston. Most respondents were micro businesses, employing less than ten staff.
- 6.41 Business confidence is moderately strong, with most companies forecasting slight growth or a static position, but few indicating profitability, staff retention, trade and other factors will decline in the next few years.
- 6.42 Of the 850 businesses contacted, around 10 percent or 86 businesses are considering moving premises within the next three years – 39 within 12 months and 47 in the next 2-3 years. Of these only five South Ribble businesses were identified as having responses, a surprisingly low number given responses to the 2015. The exact reasons for this are unclear but it is important to emphasise that this sample response thus may not be fully reflective of South Ribble demand in this area.
- 6.43 Industrial/warehouse and office requirements were roughly even. Most businesses want units of 0-200 sqm, with Chorley and South Ribble companies favouring 0-100 sqm options and Preston ones seeking 101-200 sqm units. Individual industrial and warehouse requirements extend up to 2,001-5,000 sqm however. The preference is for freehold rather than leasehold premises.
- 6.44 The findings in Section 10.0 assess the supply of available premises. In Figures 31 to 33 below, the available properties are aligned to the identified company requirements as one test of the supply and demand situation. As these Tables here demonstrate, there is currently a relatively strong supply of both office and industrial stock across all three Central Lancashire areas. As expected, vacant stock for both begins to dwindle somewhat on the larger end of the scale, however supply seems very much in tune with the number of overall requirements as suggested through the company survey, which also reduce at the larger sizes.
- 6.45 That said, it is important to remember that this company survey contacted only around 10 percent of businesses. Scaling the response up suggests that shortages in premises are likely in all areas, particularly for larger industrial premises. This point was raised by property stakeholders in Section 4.0.

Figure 31 – Chorley – Premises Supply and Demand Analysis



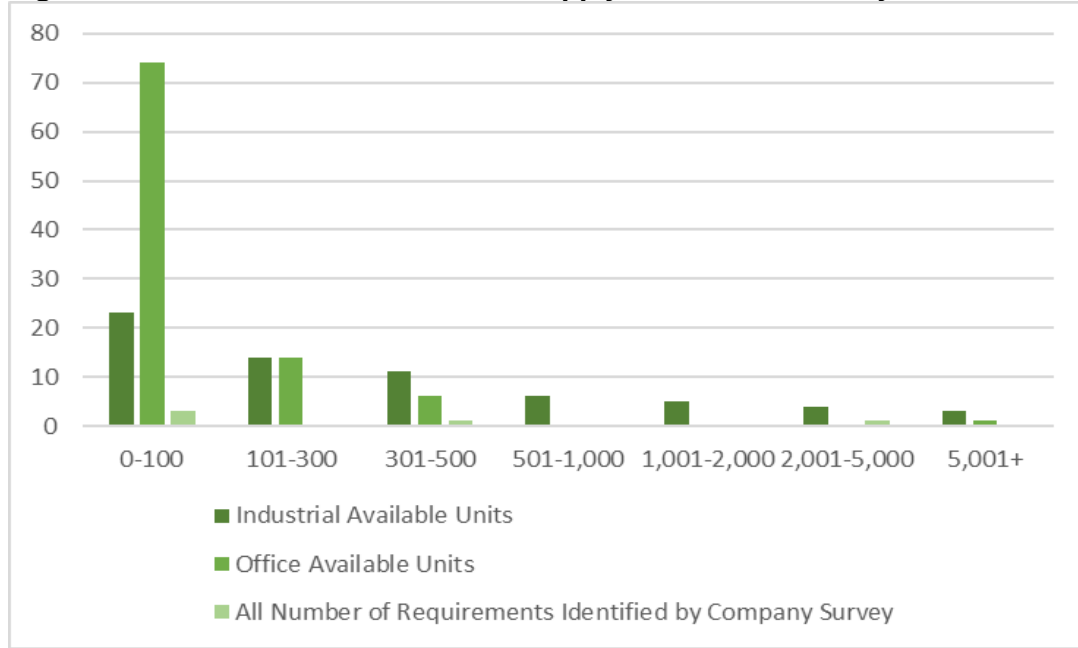
Source: BE Group 2017

Figure 32 – Preston – Premises Supply and Demand Analysis



Source: BE Group 2017

Figure 33 – South Ribble – Premises Supply and Demand Analysis



Source: BE Group 2017

6.46 Tables 31 to 33 provide a tenure analysis and suggest a Central Lancashire wide shortage of freehold premises. Chorley and Preston lack the freehold options even to meet the requirements of this 10 percent sample survey.

Table 31 – Chorley – Premises Supply – Tenure Analysis

| Requirement Property Size, sqm | Industrial Available Units | Office Available Units | All Number of Requirements Identified by Company Survey |
|--------------------------------|----------------------------|------------------------|---|
| Leasehold | 20 | 40 | - |
| Freehold (or Either) | - | 4 | 44 |

Source: BE Group 2017

Table 32 – Preston – Premises Supply – Tenure Analysis

| Requirement Property Size, sqm | Industrial Available Units | Office Available Units | All Number of Requirements Identified by Company Survey |
|--------------------------------|----------------------------|------------------------|---|
| Leasehold | 38 | 172 | 7 |
| Freehold (or Either) | 9 | 15 | 30 |

Source: BE Group 2017

Table 33 – South Ribble – Premises Supply – Tenure Analysis

| Requirement Property Size, sqm | <i>Industrial</i> Available Units | <i>Office</i> Available Units | <i>All</i> Number of Requirements Identified by Company Survey |
|---------------------------------------|--|--|---|
| Leasehold | 58 | 95 | 1 |
| Freehold (or Either) | 8 | - | 4 |

Source: BE Group 2017

6.47 It should be remembered that the company survey is just one strand of evidence, providing an illustration of pent-up demand. It is not the sole answer. It is probable that not all the company requirements identified by the survey returns will come to fruition. Equally there will be other companies who were surveyed that stated that they do not intend to relocate or expand now, but which may well do so over the next three years.

7.0 DEMAND ASSESSMENT – FUNCTIONAL ECONOMIC MARKET AREA

Introduction

- 7.1 This section defines and reviews the Functional Economic Market Area (FEMA) of Central Lancashire. It also looks in more detail at some of the neighbouring local authority areas, which fall within that FEMA area and which may compete with the Central Lancashire for strategic level property requirements. This is undertaken in recognition that the economies of Chorley, Preston and South Ribble, both individually and collectively, do not operate in isolation, but rather have intricate and important relationships between themselves and with neighbouring areas.

Functional Economic Market Area – Quantitative Evidence

- 7.2 The guidance for Housing and Economic Development Needs Assessments produced by the Department for Communities and Local Government includes guidance for the definition and consideration of a FEMA. The guidance states:

“The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply – often referred to as the functional economic market area. Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:

- *Extent of any Local Enterprise Partnership within the area*
- *Travel to work areas*
- *Housing market area*
- *Flow of goods, services and information within the local economy;*
- *Service market for consumers*
- *Administrative area*
- *Catchment areas of facilities providing cultural and social well-being*
- *Transport network.”*

- 7.3 All definitions of a functional economic market area are approximations of the interrelationships of a local economy with areas outside of Central Lancashire. The FEMA cannot account for all relationships in the economy, rather it is a representation of the key economic, workforce and consumer flows for the local economy.

7.4 Central Lancashire's economy clearly does not operate in isolation. The quantitative evidence base that influences the definition of Central Lancashire's FEMA is considered here.

Local Enterprise Partnership

7.5 The three local authorities of Central Lancashire sit at the centre of the Lancashire LEP. There is a strong degree of economic self-containment within the County and LEP area. 2011 Census data indicates that, in that year, 90 percent of commuting from, and within, South Ribble and 92 percent of commuting from/within Preston was to other parts of Lancashire. However, for Chorley the equivalent figure was only 77 percent and, as is shown below, Chorley Borough also has strong links with its neighbours in Greater Manchester, Bolton and Wigan, as well as with the City of Manchester directly.

Travel to Work Area

7.6 The commuting patterns of the working residents of, and the workforce employed in, Central Lancashire are important in understanding the housing and employment role of Central Lancashire in the context of the broader region. This has implications for the definition and understanding of Central Lancashire's FEMA.

7.7 Table 34 summarises the in and out commuting patterns of Central Lancashire as at the time of the 2011 Census. A more detailed table of data is provided at Appendix 4. The data shows that within Central Lancashire, Chorley was an exporter of labour to its neighbours, perhaps surprisingly, with a larger net outflow to South Ribble than Preston. Preston was the main importer. By far the largest single relationship was between South Ribble and Preston, with 13,500 commuting from South Ribble to the City in 2011 and another 5,200 commuting out of Preston to South Ribble. Overall, some 35,400 moved between the three authorities to work in 2011.

7.8 Outside of Central Lancashire, key trends to note are:

- Chorley – Has strong relationships, in terms of both inflows and outflows of labour, with the nearby Greater Manchester authorities of Bolton and Wigan. It also exported more than 1,000 people, in 2011, to Blackburn with Darwen, Manchester and West Lancashire
- Preston – Its strongest external relationships are with the Fylde Coast. The City's only significant net outflow is with Fylde, with some 3,300 commuting

out of Preston in 2011, compared to 2,900 commuting in. Wyre and, to a lesser degree Blackpool, were sizable net exporters of labour to Preston at this time. To the east, some 4,000-people moved between Ribble Valley and Preston although this will partly reflect movement within Longridge, which is split between these two local authorities. Lancaster and, to a lesser degree, West Lancashire and Wigan, were also sizable importers of labour to Preston

- South Ribble – Although modest compared to its relationship to Preston, South Ribble exported 2100 to Fylde in 2011, with links between the BAE Warton and Samlesbury plants likely a factor. South Ribble also exported more than 1,000 people in 2011 to Blackburn with Darwen and West Lancashire, while in-commuting rates of more than 1,000 were noted in Wigan and again Blackburn with Darwen/West Lancashire.

Table 34 – Central Lancashire Commuting Patterns

| | |
|--|--|
| Within Central Lancashire: | |
| <ul style="list-style-type: none"> • Chorley is an exporter of labour to Preston (4,800 outflow) and South Ribble (6,500 outflow) • Preston is a major importer of labour from both Chorley (4,800 inflow) and particularly South Ribble (13,500 inflow) • South Ribble is thus an exporter of labour to Preston and an importer from Chorley | |
| Key Relationships Outside of Central Lancashire | |
| Significant inflow of workers from: | Significant outflow of residents to: |
| <ul style="list-style-type: none"> • Bolton to Chorley (1,500) • Wigan to Chorley (2,000) • Blackburn with Darwen to Preston (2,300) • Fylde to Preston (2,900) • Ribble Valley to Preston (2,200) • Blackpool to Preston (1,900) • Wyre to Preston (2,400) | <ul style="list-style-type: none"> • Chorley to Bolton (2,500) • Chorley to Wigan (1,900) • Preston to Fylde (3,300) • Preston to Ribble Valley (1,900) • South Ribble to Fylde (2,100) |
| Overall Flow | |
| <ul style="list-style-type: none"> • Chorley is a large exporter of labour (11,900 net outflow) • Preston is a large importer of labour (22,200 net inflow) • South Ribble is an exporter of labour (6,500 net outflow). | |

Source: Census 2011

7.9 Preston Station is a key stop on the West Coast Main Line while some cross-county services also stop at Chorley. Accordingly, it is worth considering longer distance (likely) rail commuting as it was noted in the 2011 Census. That data source recorded that 112 Central Lancashire residents reported a commute to Westminster

or the City of London. The residence of these individuals was split relatively evenly between the three authorities. 18 Inner London residents indicated that they travelled north to Central Lancashire to work, all to Preston.

- 7.10 58 residents reported a shorter commute to Birmingham, while 51 Birmingham residents travelled north to work in Central Lancashire. Data on long distance commuting north, to and from Glasgow and Edinburgh, is not available.
- 7.11 In terms of defining the FEMA, it can be seen that that Central Lancashire has strong economic linkages – which can be defined as more than 2,000 commuter movements, in and out of any one Borough – with the following local authority areas:
- Bolton and Wigan in Greater Manchester – Strongest relationship with Chorley
 - Blackburn with Darwen – Strongest relationship with Preston
 - West Lancashire – Strongest relationship with South Ribble
 - Fylde, Wyre and Blackpool on the Fylde Coast – Strongest relationship with Preston
 - Ribble Valley – Strongest relationship with Preston.

Housing Market Area

- 7.12 The 2017 Central Lancashire Strategic Housing Market Assessment (SHMA) identified Central Lancashire as a relatively self-contained housing market, albeit with inter-relationships with Fylde Borough, Ribble Valley Borough, Wyre Council, Blackburn with Darwen, Wigan, Bolton and West Lancashire and Lancaster. However, these relationships are localised and the evidence of the SHMA does not point to these authorities falling within a common Housing Market Area overall.

Market Comments

- 7.13 Preston, City Centre and Docks, are Lancashire's predominant office market and as such attracts interest from across the County. Day-to-day requirements tend to come from within Central Lancashire and the Fylde Coast. In terms of industrial and warehousing, locations of more than local significance include Junction 31(a), Preston and Walton Summit/Bamber Bridge, South Ribble which attract county-wide interest. Chorley has a more local market, but does link to its Greater Manchester neighbours, Bolton and Wigan. In terms of logistics, Revolution Buckshaw and Junction 31(a) have competed for requirements at the regional and, on occasion, national level. Cuerden Strategic Site has the potential to do so in the future although it will face more competition as equivalent locations in Blackburn/Hyndburn, Bolton,

Wigan, St Helens, Warrington and Knowsley are brought forward. The Samlesbury Enterprise Zone is similarly a site of regional/national scope but is taking time to achieve its potential.

Services and Infrastructure

- 7.14 Central Lancashire is the meeting point of all the County's motorways. North of the City of Preston, the M55 provides a link west link to the Fylde Coast and particularly Blackpool. Around Cuerden and Bamber Bridge the M61, M6 and M65 converge. The M61 passes via Chorley and settlements of Bolton and Salford to link to the M60 Manchester Ring Road, with connections into the City of Manchester City. The M65 runs east through Pennine Lancashire, providing an immediate connection to Blackburn.
- 7.15 Running north-south, the M6 is clearly a national route. However, in the immediate Central Lancashire context it provides a strong link north to Lancaster and south to St Helens (notably Haydock) and Wigan. Connecting with the M58 near Skelmersdale it gives a further link west to the Port of Liverpool and the wider Liverpool City Region. The A6 and A49 pass through the heart of Central Lancashire to give further north-south options.
- 7.16 Preston and western parts of South Ribble are further served by the A59, which provides additional links west through West Lancashire to Liverpool and east into Yorkshire. The A583 provides a more immediate link west from Preston to the settlements of Fylde and Warton Aerodrome, and on to Blackpool.
- 7.17 In terms of services, Preston City Centre is a focus for retail trade, financial and legal services activities and public administration in Lancashire. Chorley Town Centre is a strong retail destination, as is Leyland Town Centre. Prominent out of centre retail destinations include the Capitol Centre, Walton-Le-Dale and Preston Docks. However, the catchment of all these centres is limited by the catchments of the two regional centres - Liverpool and Manchester, along with the Trafford Centre and, to a lesser extent, the competing centres of Wigan, Blackburn, Blackpool and St. Helens.
- 7.18 Based on the above evidence, in addition to its very significant economic interrelationships, the FEMA for Central Lancashire, includes the Fylde Coast local authority areas of Blackpool, Fylde and Wyre which have strong links to Preston via the M55/A583. In Pennine Lancashire, Blackburn with Darwen and Ribble Valley also

fall within the economic catchment area of Preston. In the west, West Lancashire has strong connections to South Ribble via the M6/M58, A59 and comparable routes. Finally, Chorley has a pronounced relationship with its Greater Manchester neighbours of Bolton and Wigan as a net exporter of labour.

- 7.19 The other areas of Lancashire (including Lancaster) and Greater Manchester have been excluded due to their lower relationships with Central Lancashire. As mentioned previously, the FEMA should incorporate the key relationships, rather than all relationships. Central Lancashire has a relationship with all these locations and there would be individual businesses within the three Central Lancashire Boroughs that would consider at least some of them as part of their core client base. However, overall the relationship is weaker than with the other locations shown above.

Neighbouring Areas

- 7.20 Para 160 of the NPPF states that local planning authorities should have a clear understanding of business needs within their local economic markets, by working with county and neighbouring authorities to prepare and maintain a robust evidence base about business needs and likely market changes.
- 7.21 Having initially defined the FEMA for Central Lancashire, the remainder of this section considers each of the districts which fall within that area on an individual basis. Accordingly, discussions have been undertaken with stakeholders in relation to these adjoining market areas, specifically Bolton, Wigan in Greater Manchester and Blackpool, Blackburn with Darwen, Fylde, Ribble Valley West Lancashire and Wyre in Lancashire.

Greater Manchester

Greater Manchester Spatial Framework

- 7.22 The Draft Greater Manchester Spatial Framework (GMSF) has been completed and was subject to consultation over October 2016-January 2017. Publication of a Submission Draft is expected in 2017, with Examination in Public and adoption in 2018. To 2035, the GMSF will:
- *“Set out how Greater Manchester should develop over the next two decades up to the year 2035*
 - *Identify the amount of new development that will come forward across the 10 districts, in terms of housing, offices, and industry and warehousing, and the main areas in which this will be focused; support the delivery of key*

infrastructure, such as transport and utilities

- *Protect the important environmental assets across the conurbation*
- *Allocate sites for employment and housing outside of the urban area*
- *Define a new Green Belt boundary for Greater Manchester.”*

7.23 The GMSF sets targets, to 2035, of:

- GVA growth of 2.5 percent year on year, giving an uplift of £5 billion above baseline conditions
- 199,700 additional jobs
- Population growth of 294,800, which translates into 227,200 net new homes.

7.24 The GMSF proposes a high level of economic growth for Greater Manchester, above baseline forecasts. Around 2,450,000 sqm of new office floor space is proposed over the period 2015-2035, much of which will be in the City Centre, complemented by growth at The Quays, Manchester Airport and the main town centres. In Bolton, this will include 100,000 sqm of extra space and 35,000 sqm in Wigan.

7.25 Around 4 million sqm of new industrial and warehousing floor space will be completed, including a range of strategic, motorway accessible sites. In Bolton 965,000 sqm is proposed, 1,261,000 sqm in Wigan.

7.26 Identified strategic growth locations, alongside the City Centre, The Quays, and Manchester Airport, which will link to Central Lancashire, include:

- Western Gateway – the Manchester Ship Canal, the two Manchester-Liverpool rail lines, the M62, M60 and M602 motorways. It will focus on Trafford Park, Port Salford and Carrington. In the long-term, the Western Gateway will deliver around 1,400,000 sqm of industrial and warehousing floorspace, and over 20,000 dwellings
- M6 corridor in Wigan – developing land around junctions 25 and 26 of the M6. For 333,000 and 150,000 sqm of floorspace respectively
- M61 Corridor in Bolton – There will be new strategic opportunities for development at Hulton Park and Chequerbent, west of Westhoughton, and to the south of junction 6 of the M61. Overall this corridor will deliver around 6,000 new homes by 2035, and has capacity for around 850,000 sqm of employment floorspace. The completion of Logistics North and its associated country park will take place early in the plan period. In the longer term, a substantial new

employment development will be delivered to the west of the existing Wingates industrial estate

- East Lancashire Road Corridor- offering several opportunities for major development linked to major improvements in public transport. Overall it will deliver around 133,000 sqm of employment floorspace and up to 3,600 new homes by 2035.

7.27 Specific site proposals for Bolton and Wigan are discussed further below.

Bolton

7.28 By far the most significant strategic development in Bolton is the 80 ha Cutacre development off Junction 4, M61. This is a major logistics scheme, marketed as Logistics North, and offering 400,000 sqm of space in plots capable of accommodating properties of 10,000-100,000 sqm. Existing occupiers include Aldi in 54,000 sqm and MBDA in 12,000 sqm. Joy Global, Costa Coffee, Green King and Lidl are occupiers with some 250,000 sqm of space completed to date in the North West's largest active commercial development.

7.29 Owners Harworth Group recently entered into a joint venture with Lancashire County Pension Fund to develop the next phase, creating ten new commercial units totalling approximately 52,400 sqm across 12.6 ha. The new units will be constructed in three separate phases, with three units – ranging from 4,200 to 6,000 sqm – completed by the end of December 2017. Six further units are programmed for 2018.

7.30 This is a logistics site of regional significance which will compete with locations such as Omega, Warrington for major national and regional requirements. It may draw some potential occupiers away from equivalent Central Lancashire locations, particularly Junction 31a, Preston and Cuerden Strategic Site, but its location close to the boundaries of Bolton, Wigan and Salford means that it will be particularly attractive to those looking for a large motorway site in the heart of Greater Manchester.

7.31 In the west of the Metropolitan Borough, the 74 ha Horwich Loco site is also proposed for a large mixed use (residential and employment) scheme. The consented development will feature 35,225 sqm of employment/mixed use commercial, 1,700 new homes and open space including pedestrian and cycle routes. The scheme will be developed by Horwich Vision Ltd, a joint venture between

Bluemantle and the Homes and Communities Agency, in partnership with Bolton Council. A 10-12 year delivery timetable is anticipated for this scheme which is expected to draw some labour from Chorley Borough.

7.32 Additional sites, now proposed in the GMSF, include:

- Policy M61C1: Junction 6 (Bolton) – The site borders the existing Wingates Industrial Estate, the A6 and Dicconson Lane to the north, a disused railway line to the west and Westhoughton Golf Club to the south. It is proposed for around 440,000 sqm of B2/B8 floorspace to 2035, as part of a mixed-use scheme. Delivery is expected later in the Plan period once Logistics North is completed.
- Policy M61C2: Hulton Park and Chequerbent (Bolton) – The Hulton Park and Chequerbent Opportunity Area is located east of Westhoughton and North of Atherton. It is bordered by the M61 to the north, the A579/existing residential development to the East, residential development/the boundary between the boroughs of Bolton and Wigan to the south and the A58/residential development to the West. Uses will include 2,700 new homes and 25,000 sqm of B2/B8 floorspace including logistics uses.

7.33 Overall, Bolton Borough has a large stock of employment land extending to some 130-145 ha along with a further 60 ha in mixed use sites. This will meet defined needs of between 145 ha and 165 ha up to 2026 as defined in the Adopted Core Strategy (2011). A high proportion of this land supply is in brownfield industrial locations in Bolton, Farnsworth and Kearsley and forming part of the broader urban land offer of the Greater Manchester Conurbation.

Wigan

7.34 Wigan Council consulted in 2015 on an Allocations and Development Management Local Plan Development Plan Document (DPD). However, further work on this is on hold pending substantial progress on the GMSF (see above). A formal date for restarting needs to be agreed.

7.35 Wigan's Core Strategy, adopted in September 2013, establishes a need for approximately 200 ha of employment land over 2011 and 2026, or 13-14 ha/year. This reduces to 196 ha with recent take-up.

7.36 Meeting this need is expected to be challenging for Wigan. Policy EM1 of the Draft

Allocations and Development Management Local DPD, establishes 5 major allocated sites which will satisfy one-third of the requirement:

- EM1.1: Land at Leopold Street, Pemberton, Wigan – 2.04 ha
- EM1.2: Land at Smithy Brook Road, Wigan – 14.42 ha
- EM1.3: Land at Landgate Lane, Bryn – 5.49 ha
- EM1.4: South Lancashire Ind. Estate Extension, Ashton-In-Makerfield – 32.92 ha
- EM1.5: Land at Chaddock Lane, Astley – 13.37 ha.

7.37 A further five ‘Major Sites’ will supplement this requirement, larger mixed use proposals including some employment allocations totalling 69 ha. Beyond this, an outstanding need of some 59 ha remains, and it will have to be determined whether to proceed with an identified shortfall of employment land, or look towards a Green Belt release.

7.38 Proposed employment allocations are mostly focused in the southern half of the Borough and thus are geographically distant from Central Lancashire. Site MS1: South of Hindley is perhaps of most relevance since it links to Junction 5, M61 and thus has a strong relationship north to Chorley and the Preston Conurbation. The proposal here is for a mixed-use scheme of 2,000 homes and 12 ha of employment land. This will form a major new Urban Village for the Borough and plans are being progressed by Peel Land and Property, with planning applications likely in the next few months. Early phases of development likely to be residential focused though with only modest employment delivery before 2026.

7.39 Further large scale development is proposed at South Lancashire Industrial Estate. This is recycled land at Ashton-in-Makerfield which boasts additional land for expansion on top of the units already in place. This expansion however would require highways infrastructure works. Further development in the Standish area may be possible, but proposals remain undefined at this stage. It is assumed that most new development will be residential in nature.

7.40 Additional sites, now proposed in the GMSF, include:

- Policy M61C4 West of Gibfield, Atherton (Wigan) – Links to the Bolton site M61C2: Hulton Park and Chequerbent (Bolton). The land borders Wigan Road, Atherton and properties to the south; Schofield Lane and open land to the east of Schofield Lane to the west; the Atherton railway line to the north; and

properties on North Road, Atherton and the Gibfield development to the east. Proposals include 45,500 sqm of floorspace for B1, B2, B8 employment uses

- Policy M6C1 Junction 25 (Wigan) – Of relevance to Central Lancashire, the Junction 25 strategic area provides an opportunity for a substantial employment development in the M6 corridor. The land borders the southern edge of Wigan (Wheatlea Industrial Estate and Winstanley) to the north, the A49 Warrington Road/Wigan Road to the east, the northern edge of Ashton-in-Makerfield (Link 25 Business Park/Soughers Lane) to the south and the M6 motorway to the west. Proposals include around 332,500 sqm of B1, B2, B8 employment uses
- Policy M6C2 Junction 26 (Wigan) – Complimenting the above is a further opportunity at Junction 26. This land borders Spring Road to the north; the Kitt Green area of Wigan and the school fields of Abraham Guest Academy to the east; properties fronting the A577 Orrell Road to the south; and the M6 Motorway to the west. Proposals include 150,500 sqm of B1, B2, B8 floorspace.

Lancashire – Pennine Lancashire

Blackburn with Darwen

- 7.41 Prestige sites within Blackburn with Darwen include the Evolution Park site adjacent to Royal Blackburn Hospital. However, linkages with Central Lancashire will likely be focused along the M65 Corridor and further land allocations have been made at M65 Junctions 4, 5 and 6 in the adopted Local Plan Part Two. These are mostly local scale sites of 2-6 ha, which comprise the total supply of 66 ha which is needed over 2011-2026.
- 7.42 The main exception is the Whitebirk Site, at Junction 6, M65. This extends to 35 ha, of which 22 ha is in Hyndburn and 13 ha in Blackburn. The land now has outline consent for B1(c)/B2 industrial and B8 logistics uses together with a drive through hot food take away (A5), pub/restaurant (A3/A4), a hotel (C1), and a petrol filling station. Some 92,415 sqm of B1/B2/B8 uses is proposed on 17.48 ha of land. If fully consented development would commence in late 2017, with a first phase of B8 logistics space, all development would be completed by the early 2020s.
- 7.43 Whitebirk will provide some competition for the Cuerden Strategic Site and Junction 31a, particularly in the area of B8 logistics. Phase 1 at Whitebirk is expected to include 44,000 sqm of warehousing on 8 ha. However, while Whitebirk was originally

conceived as a Strategic Regional Site serving all of Pennine Lancashire, it is increasingly considered as a more local allocation, serving the needs of Blackburn with Darwen and Hyndburn only. The other Pennine Lancashire authorities are no longer looking to the site to meet any element of their employment land requirements.

- 7.44 The aerospace and advanced flexible materials sectors are considered key within Blackburn and Darwen and the Borough already contains a number of companies within the BAE Systems supply chain. Stakeholders hope the Borough can attract further companies who are looking to support BAE but are not eligible to locate on the Samlesbury Enterprise Zone itself.
- 7.45 Elsewhere however, Blackburn and Darwen is felt to be relatively self contained with retail, leisure, office and industrial markets which are distinct from Central Lancashire. Blackburn and Darwen's retail and employee catchment area more naturally extends east to Burnley, Hyndburn and Pendle.

Ribble Valley

- 7.46 The Ribble Valley Core Strategy was adopted in 2014. It proposes an extra 8 ha of employment land to 2028, reduced to 1.6 ha after completions, etc. Ribble Valley Borough Council is now working to prepare a Housing and Economic Development, Development Plan Document and is now consulting on a Preferred Option version. That DPD presently identifies three new employment land allocations, totalling 4 ha:
- Policy EAL1 Land at Sykes Holt, Mellor (1.7 ha)
 - Policy EAL2 Land at Time Technology Park, Simonstone (0.8 ha)
 - Policy EAL3 Land at Higher College Farm, Longridge (1.5 ha).
- 7.47 Clearly the Longridge allocation overlaps with the Preston economy, although the scale of the proposed site is modest compared to the land and property offer of North East Preston and is unlikely to attract significant business away from the City. Rather it responds to comments made in the 2013 Ribble Valley Employment Land Study Refresh (completed by BE Group) and elsewhere about the need for local growth opportunities to meet the specific requirements of Longridge town.
- 7.48 Ribble Valley Enterprise Park, off the A59 at Clitheroe is identified as the Borough's main established employment area with some 12 ha of land remaining here. Land at

this location has been on the market for some years and while interest is being recorded from developers and occupiers, delivering a commercially viable scheme here remains a challenge. Only housing has been delivered at this location in recent years.

- 7.49 The 2013 Employment Land Study Refresh suggested that while the local property market was stable, and some rural businesses schemes were performing very well, there remained an oversupply of both office and industrial property in the Borough. There was also little inward investment.
- 7.50 Stakeholders feel that demand has improved since that time. Clitheroe, Longridge, Whalley and rural schemes are proving increasingly successful in attracting SMEs undertaking bespoke manufacturing and small scale warehousing. Such companies are attracted by the good environmental quality and high standard of living locally.
- 7.51 Occasionally larger companies are also being attracted. At present, the highest profile relocation is Thwaites which in 2014 announced the relocation of its main Brewery from Blackburn Town Centre to Sykes Holt at Mellor Brook, just off the A59. Total investment in the move could be as much as £10 million, with 200 staff relocated. The move to a site in the south west of Ribble Valley, on the A59 Corridor, is also likely to benefit South Ribble and Preston.
- 7.52 Ribble Valley's office market remains negligible however. Longridge may benefit from economic growth from North East Preston but at present lacks the land to support the local expansion of employment opportunities.
- 7.53 Samlesbury Enterprise Zone is a strategic opportunity site which will inevitably benefit both Ribble Valley and Central Lancashire. Ribble Valley feels that, as with Blackburn with Darwen, it could benefit from supply chain businesses looking to relocate to the area to serve BAE, but who are ineligible to operate from the Enterprise Zone itself. Sites elsewhere on the A59 Corridor would be logical alternative locations for such businesses, likely including sites at Clitheroe if an appropriate land and premises offer can be brought forward.

Lancashire – Fylde Coast

Blackpool

- 7.54 Blackpool's Core Strategy was adopted in 2016. It seeks to safeguard around 180 ha of existing industrial/business land for employment use; and promote opportunities for redevelopment to create new/enhanced B-Class premises. The Town Centre will be a focus for office development, while new employment development generally will be focused in the south of the town.
- 7.55 The 2013 Blackpool Employment Land Study identifies an employment land need of 31.5 ha to 2027, based on average annual take-up rate of 1.75 ha and including a 20 percent flexibility allowance to provide a margin of choice. Against this need, Blackpool had a modest realistic supply of only 17.8 ha, as of July 2012. This suggests a shortfall in supply of 13.7 ha.
- 7.56 Blackpool is intensely developed and has a tightly constrained boundary, which means there are few opportunities for delivery of new employment land within the town. Instead it is now agreed that Fylde will provide for this shortfall, which will be added to Fylde's requirement over their Local Plan period to 2032. Development to meet this need will be focused around the cross-boundary locations of Whitehills at Junction 4, M55 and at Blackpool Airport. There is no expectation that Blackpool will need to look outside of the Fylde Coast to meet shortfalls.
- 7.57 A key strategic site for Blackpool and Fylde is Blackpool Airport. The Airport currently provides a limited range of scheduled air services, primarily servicing Irish Sea gas and oil platforms and off-shore wind farms alongside executive and private aviation. It also recently moved from CAT II to CAT III operational capability, which increases the size of aircraft the Airport can receive, and has the capacity for further operational status upgrades.
- 7.58 Blackpool Airport secured Enterprise Zone status in 2015 and that status will continue to 2041, covering 141 ha much of which encompasses a large portion of the operational airfield. The Enterprise Zone is being targeted at a range of sectors including energy, aviation, food and drink manufacturers, creative, digital, advanced manufacturing and professional services, but unlike other Enterprise Zones there is no strong emphasis on a core sector of operations.
- 7.59 The growth targets are for more than 180 new businesses, a minimum of 3000 new jobs over its lifetime, more than £300 million of new private sector investment and £60 million plus of retained business rates growth. The Enterprise Zone is currently

home to some 260 businesses, with 1,800 employees.

- 7.60 Both Blackpool Airport and the Lancashire (Samlesbury-Warton) Enterprise Zones have an emphasis on the aviation sector although there are also clear differences with the Lancashire Enterprise Zone focused on aviation manufacture and the BAE supply chain, particularly for defence activities. Blackpool Airport by comparison is a civilian and commercial facility, with a focus on the operational aspects of the aviation sector. The Airport Enterprise Zone also extends to include local office and industrial/warehouse areas which support occupiers in a range of more general business sectors. Finally, Blackpool Airport is also subject to specific plans for a new Energy Sector HQ, a dedicated new training facility to be developed by Blackpool and Fylde College. It is intended that the Enterprise Zone will become a wider centre of excellence and commercial activity for the energy sector, linked to its existing support activities for Irish Sea energy operations. A masterplan for the Airport Enterprise Zone is currently being prepared.

Fylde

- 7.61 The emerging Fylde Local Plan is subject to an ongoing Examination in Public with plan adoption, subject to the outcome of the Examination, expected by the end on 2017. It is informed by the Fylde Employment Land and Premises Study (2012), which was completed by BE Group. Based on the forward projection of average annual take-up of 2.7 ha/year (later amended to 2.22 ha/year), the Borough's land need is 46.6 ha to 2027. As noted above, a further 14 ha is required to meet Blackpool's requirements. Further adjustments to allow for ongoing completions over 2011-2015 and an extended Local Plan period, to 2032, the total land need is 60 ha.
- 7.62 Major employment land allocations include 14.5 ha at Blackpool Airport Enterprise Zone, as discussed above. Another 31 ha is proposed in, and around, the Whitehills and Whyndyke areas, off Junction 4, M55.
- 7.63 The Whitehills Area was the subject of Development Appraisal work in 2013, also completed by BE Group. That research identified the strength of links between Whitehills/Fylde and the Preston Conurbation along the M55 Corridor. Whitehills includes an established body of public sector and financial services companies (with further large businesses in Lytham and St Annes), which link to the larger offer of Central Preston and Preston Docks. The local service sector at Whitehills has seen little recent growth however, and research suggests that future growth in the area will

focus on industrial/warehousing space of 500-5,000 sqm, primarily meeting the needs of companies indigenous to the Fylde Coast. At present at least, Whitehills is not attracting larger inward investment opportunities that might otherwise have gone to Central Lancashire.

- 7.64 The other strategic site in Fylde is the Warton element of the Lancashire Enterprise Zone. This employment site is considered separately, alongside its partner site at Samlesbury, in Section 5.0.

Wyre

- 7.65 Wyre's emerging Local Plan has yet to be published in full, while the earlier Wyre Core Strategy Preferred Option (2012) is not now being progressed.
- 7.66 The latest Wyre Employment Land Study Update (2015) highlights the strong commuting relationships between the Fylde Coast and Centre Lancashire, particularly Preston and South Ribble. Market demand in Wyre can more self-contained with most requirements coming from within the Fylde Coast area. Demand is almost exclusively for industrial space of up to 5,000 sqm. The office market is modest, and Wyre does not have a defined hub for B1(a) uses.
- 7.67 Employment land take up was 2.46 ha/year over 2004-2015. Against this rate of take-up Wyre had an employment land supply of some 92 ha in 2015, a 36 year forward supply, although this would reduce to 54 ha if sites suited for specialist port and chemicals uses are removed. Measured through jobs growth (policy on and policy off) scenarios and measures of past take up, Wyre requires 43 – 67 ha of office and industrial land over 2011-2031. Thus, the Borough has a present shortfall of 6-13 ha. New allocations are recommended for the rural east and north of Wyre, to deliver employment opportunities for the whole Borough.
- 7.68 Key employment locations in Wyre Borough tend to be focus in the north western area of Fleetwood/Thornton-Cleveleys and Poulton. These include Fleetwood Dock (South), Copse Road, Red Marsh Industrial Estate, Thornton, Poulton Industrial Estate. The offer on the A6 north of Preston, at Garstang and Catterall, is of a more modest local scale.
- 7.69 The main strategic site in Wyre is the 138 ha Hillhouse Business Park in Thornton-Cleveleys. The site was designated an Enterprise Zone in 2015, with a market focus on the hi-tech chemical and polymer sectors alongside energy and advanced

manufacturing. The employment target is to increase employment at the site from 1,650 jobs today to more than 3,000 jobs by 2035.

- 7.70 Hillhouse, which is owned by developer NPL Group, is home to a large established chemicals cluster, with specialisations in high tech-chemicals, polymers, energy generation and environmental (waste). It is secure and has a Top-Tier COMAH designation. Planned investments over 2017-19 are primarily in new power generation and waste processing facilities, along with associated B2/B8 business space.
- 7.71 While growth at Hillhouse may draw some chemicals, energy and waste sector specific companies away from Central Lancashire, Hillhouse Business Park has been an established chemicals/waste cluster for many years and the Enterprise Zone designation does not change this basic focus. Overlap with the Lancashire Enterprise Zone, which is focused on aerospace, automotive and comparable advanced manufacturing, is likely to be minimal.
- 7.72 Regeneration at Fleetwood Docks will deliver new B-Class premises, but the overall focus will remain on port-related uses, including a new fish-processing park which is a distinct offer from anything in central Lancashire.

Lancashire – West Lancashire

- 7.73 West Lancashire was included within the Liverpool City Region Joint Employment Land and Premises Study, completed by BE Group in 2010. That study indicated that the Borough had 69.90 ha of employment land made up of 20 sites. However, 10.44 ha of this comprised land in operational use by companies, or held for future expansion. The realistic supply was therefore considered to be 59.46 ha, comprising 15 sites. Most of this land is in Skelmersdale. There is only a modest supply in the smaller northern settlements which border Chorley and South Ribble Borough's, such as Tarleton. An additional 93.04 ha is required to 2026, based on past take-up rates of 7.06 ha/year between 1992/93 and 2007/08, and including a 20 percent buffer.
- 7.74 This was updated in the Liverpool City Region Housing and Economic Development Evidence Base Overview Study, 2011. The study indicated a land supply, at December 2010, of 49.66 ha. West Lancashire needs 135.03 ha of land to 2031, giving a shortfall of 85.37 ha.
- 7.75 The West Lancashire Local Plan, 2013 indicates that 75 ha of employment land will

be required between 2012 and 2027. 52 ha of this will be provided in Skelmersdale through the development of existing allocations (notably at White Moss and XL Business Park) and the regeneration of vacant and under-used premises on Pimbo, Gillibrands and Stanley Industrial Estates. The remaining 23 ha will be provided through:

- Existing allocations and remodelling of the Burscough industrial estates (3 ha)
- Extension of the Burscough industrial estates into the Green Belt (10 ha)
- Existing allocations and remodelling of Simonswood Industrial Estate (5 ha)
- Existing allocations and new opportunities for rural employment sites in rural areas (5 ha).

7.76 The strongest linkages between West Lancashire and Central Lancashire are likely to be around Skelmersdale, particularly Gillibrands Industrial Estate, Pimbo Industrial Estate and Stanley Industrial Estate. These three very large industrial estates are all located within the M58 corridor and are easily accessible from the M6 Corridor. There is an established body of national and international B2 and B8 businesses that operate regional scale operations from this area including Procter and Gamble, Walkers Crisps and Matalan.

7.77 Also located off the M58 at Skelmersdale are White Moss Business Park and XL Business Park (which includes logistics facilities for Asda and Comet). Together these two employment areas include some 27 ha of undeveloped expansion land. Skelmersdale is therefore identified as a location which can compete with Central Lancashire for investment from larger B2 and B8 businesses. It is also geographically well placed to meet an element of land needs from the Liverpool Superport, although West Lancashire District Council concedes that at present, West Lancashire still lacks a sufficient supply of large allocated sites adjacent to, or in close proximity to the M58 corridor to take advantage of the longer-term logistics and warehousing opportunities emerging.

7.78 The rural areas of West Lancashire overlap with those of Chorley and South Ribble, south of the Ribble Estuary. The A59 provides a major link through this area, from Preston to Burscough, Ormskirk and on into Liverpool. Along this route, the Burscough Industrial Estates provide a sizable offer of mostly smaller industrial and warehousing space, which serve a wide rural catchment extending into Chorley/South Ribble.

Summary

- 7.79 Based on a mix of market evidence and commuting data, the FEMA for Central Lancashire includes the Fylde Coast local authority areas of Blackpool, Fylde and Wyre which have strong links to Preston via the M55/A583. In Pennine Lancashire, Blackburn with Darwen and Ribble Valley also fall within the economic catchment area of Preston. In the west, West Lancashire has strong connections to South Ribble via the M6/M58, A59 and comparable routes. Finally, Chorley has a pronounced relationship with its Greater Manchester neighbours of Bolton and Wigan as a net exporter of labour.
- 7.80 Stakeholders with links to this wider FEMA were contacted, and key issues for Central Lancashire are identified in Table 35.

Table 35 – FEMA Issues

| Area | Comments |
|-----------------------|--|
| Bolton | The 80 ha Cutacre development off Junction 4, M61 is a major logistics scheme, with considerable spare capacity, which will compete with the Cuerden Strategic Site/Junction 31(a), Preston for requirements for businesses looking to serve the North West and particularly Greater Manchester market. At the smaller scale, the Horwich Loco site could provide competition for Chorley. |
| Wigan | Wigan has a range of strategic employment sites. Site MS1: South of Hindley is perhaps of most relevance since it links to Junction 5, M61 and thus has a strong relationship north to Chorley and the Preston Conurbation. However, most are mixed use sites which are expected to primarily deliver housing in the short and medium term. |
| Blackburn with Darwen | The Whitebirk Site, at Junction 6, M65 is the closest competing strategic location to the Cuerden Strategic Site, it is expected to deliver larger B2/B8 uses over the next few years, but has yet to do so. The aerospace and advanced flexible materials sectors are considered key within Blackburn and Darwen and the Borough already contains several companies within the BAE Systems supply chain. Stakeholders hope the Borough can attract further companies who are looking to support BAE but are not eligible to locate on the Samlesbury Enterprise Zone itself. |
| Ribble Valley | Excluding the cross-boundary Samlesbury Enterprise Zone, there are no other strategic scale sites and employment areas in Ribble Valley, although the Borough clearly provides an element of labour for the Central Lancashire market. |
| Blackpool | A constrained land supply across Blackpool will place limits on the Borough's employment growth. There will be a likely overlap in the aviation sector between Blackpool Airport and the Lancashire (Samlesbury-Warton) Enterprise Zones. However, there are also clear differences with the Lancashire Enterprise Zone focused on aviation manufacture and the BAE supply chain, particularly for defence activities. Blackpool Airport by comparison is a civilian and commercial |

| Area | Comments |
|-----------------|---|
| | facility, with a focus on the operational aspects of the aviation sector. The Airport Enterprise Zone also extends to include local office and industrial/warehouse areas which support occupiers in a range of more general business sectors. |
| Fylde | There are clear service sector linkages along the M55 Corridor, between Whitehills and Preston. The local service sector at Whitehills has seen little recent growth and is not attracting larger inward investment opportunities that might otherwise have gone to Central Lancashire. |
| Wyre | Hillhouse Business Park in Thornton-Cleveleys is expected to meet large scale chemicals sector requirements in the region, especially when combined with a growing chemicals sector offer in West Runcorn. |
| West Lancashire | The large industrial estates of Skelmersdale are well established and some 52 ha of further growth land is available in the town. Skelmersdale is particularly likely to compete with Central Lancashire for logistics and industrial requirements emerging from the growing Liverpool Superport. |

Source: BE Group, 2017

8.0 DEMAND ASSESSMENT – OBJECTIVELY ASSESSED NEEDS

Introduction

8.1 Planning Practice Guidance states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods, and highlights that these should include historic land take-up and future employment/population change. The methodology employed in this study uses two models and associated sensitivity testing. None provide a definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and therefore they are considered in the context of the market overview undertaken as part of this study.

8.2 The models are:

- Historic land take-up forecast

This reviews the actual take-up of employment land in the three Central Lancashire Boroughs over a period of time. The method is not wholly reliable as there will be peaks and troughs, and different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up.

- Employment based forecast

This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs from figures are then translated to land using a formula based on a jobs to floorspace density, which in turn can be translated into the projected land need. This scenario uses as its base Oxford Economics forecasts for 2016/17, which account for the most recent national and regional socio-economic and political changes (pre the latest General Election at least). The dataset is also consistent with that used in the Central Lancashire SHMA which was produced at the same time as this report.

8.3 This is a 'policy-off' scenario in that it does not account for any strategic policy initiatives which seek to boost jobs growth. To account for the impact of City Deal, and the strategic sites of Cuerden and Samlesbury, further sensitivity testing is undertaken for Preston and South Ribble only, the two local authorities directly impacted by these initiatives.

- 8.4 These forecasts have several limitations. They are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends. Therefore, sensitivity testing against actual land take-up is undertaken to assess how the two trends in Central Lancashire are related.
- 8.5 The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing, or shrinking which in turn can inform land and property needs.
- 8.6 In some forecast methodologies, a third, Resident Workforce forecast model is used. This uses the same method of forecasting as the employment based method but takes forecast changes in the working population i.e. labour supply, rather than jobs – labour demand.
- 8.7 However, in completing previous Employment Land Studies, BE Group has found that labour supply figures do not accurately predict future land needs. Amongst other flaws, there is no allowance for the impact of in-commuting or company aspirations for growth. The relevance of the figures is more related to evaluating the relationship between economic and housing needs. Therefore, the method is not utilised in this study.
- 8.8 The method adopted in this Study brings together all the forecasts, and compares them with historic trends through the sensitivity testing. To do this, actual land take-up and building completions over a period from 1991 to 2016 are compared with land needs that would have been generated from jobs change during the same period. The resultant land figures show that actual take-up is many times the assumed need compared with the jobs calculation for that period.
- 8.9 The methods, and calculations, are considered in turn.

Scope of the OAN

- 8.10 It should first be noted that all analysis in the section, whether of land take up or labour force change (policy on or policy off), relates to the local authority areas of Chorley, Preston and South Ribble. Accordingly, the resulting Objectively Assessed

Need is for those three local authority areas only. It does not relate to the wider FEMA, as discussed in Section 7.0. However, this does not preclude the option that strategic scale employment sites in areas close to the Central Lancashire boundary could contribute to meeting the identified OAN.

Aligning Supply and Need Dates

- 8.11 This study measures need back, from 2017, to 2014. This allows consistency with other parts of the Central Lancashire evidence base, including the SHMA, but does mean that the base date for measuring need (2014) is out of alignment with the base date for measuring supply (2016). To ensure the two align, it is appropriate to add back into the supply total completions that have occurred since 2014, indicating Central Lancashire's land potential at that time.
- 8.12 As is indicated in Section 10.0, the realistic land supply for Central Lancashire is 175.29 ha, comprising:
- Chorley: 52.25 ha
 - Preston: 70.68 ha
 - South Ribble: 52.36 ha.
- 8.13 Annual employment land take up is recorded in Table 35 below. For the two years 2014/15 and 2015/16 the following completion rates are recorded:
- Chorley: 7.50 ha
 - Preston: 1.01 ha
 - South Ribble: 4.63 ha.
- 8.14 Thus the 2014 supply position in Central Lancashire is **188.43 ha**, comprising:
- Chorley: 52.25 ha (realistic supply) + 7.50 ha (2014-2016 take up) = 59.75 ha (backdated supply)
 - Preston: 70.68 ha (realistic supply) + 1.01 ha (2014-2016 take up) = 71.69 ha (backdated supply)
 - South Ribble: 52.36 ha (realistic supply) + 4.63 ha (2014-2016 take up) = 56.99 ha (backdated supply).

Model 1: Historic Land Take-up

- 8.15 Employment land take-up annually is recorded by the three Councils. Table 36 shows the schedule of completions between 1991 and 2016 based on this data. As can be

seen there is a data gap for Preston for 2010-2012 and this is accounted for in calculations. Preston and South Ribble could also not split their take up for the 1990s and early 2000s by year, but the overall figures for that period are provided and utilised in calculations.

Table 36 – Employment Land Take-Up 1991-2016

| Completion Period | Chorley | Preston | South Ribble |
|--|----------------|----------------|---------------------|
| 1991-1992 | 1.1 | 27.94 | 5.00 |
| 1992-1993 | 0.5 | | |
| 1993-1994 | 1.4 | | |
| 1994-1995 | 0.8 | | |
| 1995-1996 | 2.0 | 6.73 | 12.10 |
| 1996-1997 | 1.6 | | |
| 1997-1998 | 3.92 | | |
| 1998-1999 | 3.6 | 26.99 | 0.00 |
| 1999-2000 | 2.3 | | |
| 2000-2001 | 0.59 | | |
| 2001-2002 | 0.92 | | |
| 2002-2003 | 1.06 | | |
| 2003-2004 | 6.73 | 6.71 | 2.07 |
| 2004-2005 | 2.91 | | 3.70 |
| 2005-2006 | 12.55 | | 11.24 |
| 2006-2007 | 10.91 | 1.09 | 9.97 |
| 2007-2008 | 12.15 | 2.25 | 7.70 |
| 2008-2009 | 2.53 | 1.65 | 4.25 |
| 2009-2010 | 5.11 | 0.38 | 0.00 |
| 2010-2011 | 2.63 | 2.83 | 0.00 |
| 2011-2012 | 2.38 | No Data | 14.62 |
| 2012-2013 | 6.49 | No Data | 12.60 |
| 2013-2014 | 3.92 | 1.11 | 0.70 |
| 2014-2015 | 1.71 | 3.29 | 0.00 |
| 2015-2016 | 5.79 | 0.48 | 0.00 |
| Total | 95.60 | 81.98 | 88.58 |
| Annual average over 25 years (23 for Preston) | 3.82 | 3.56 | 3.54 |
| Reduced annual average, excluding anomalous years | 2.73 | 3.42 | 2.66 |

Source: CBC, PCC, SRB, BE Group, 2017

- 8.16 In total, over that period 266.16 ha of land has been developed in Central Lancashire, 35.9 percent of was in Chorley, a third was in South Ribble and 30.8 percent in Preston. By local authority area, Chorley has an average annual take-up rate of 3.82 ha/year, while Preston and South Ribble record slightly lower average annual rates of 3.56 ha/year and 3.54 ha/year respectively. In the case of South Ribble, the annual take up rate recorded is not dissimilar to that seen in the 2015 South Ribble Employment Land and Property Study (3.65 ha/year).
- 8.17 There have been peaks and troughs in take up over the full 25-year period recorded for each Borough, which generally accord with periods of national growth and recession. Generally, Chorley and South Ribble saw higher rates of take up this century than in the 1990s, although take-up in South Ribble did drop to zero at times during the last recession, something not evidenced elsewhere. Conversely, Preston enjoyed high rates of development in the 1991-2005 period than in the last decade.
- 8.18 However, the biggest anomalies can be identified as:
- Chorley – High take up rates, equating to more than 10 ha/year over 2005-2008. This is at least partially accounted for by the delivery of several large logistics properties at the Revolution, Buckshaw Village and does accord with a period of national market growth
 - Preston – The more limited annual breakdown makes it harder to identify any anomalies, but 2004/05 was clearly a year of above average take up which accords with a high development year in North East Preston
 - South Ribble – Like Chorley, South Ribble saw high take-up during the national growth years 2004-2007/08. More surprising is the take-up recorded in 2010/11 and 2011/12, when 27.22 ha of completions were noted during a period of low growth nationally. This is explained by the completion of two very large warehouse premises in the Borough over those two years – a development on Lancashire (Enterprises) Business Park, Farington, replacing a large fire damaged building, and completion of the 39,000 sqm Waitrose Regional Distribution Centre at Matrix Park, Buckshaw Village.
- 8.19 Table 36 above shows reduced average annual take-up rates, excluding those anomalous years, although, as can be seen, the difference for Preston is negligible. However, the evidence is that larger (primarily) B8 logistics developments are a feature of all three locations, even if the biggest completions happen only

infrequently. They have occurred in the past and are likely to occur again, particularly with motorway-linked sites in Cuerden (Strategic Site), South Ribble; Great Knowley, Chorley and North East Preston potentially providing large plots which will be well suited for larger B2/B8 options. Thus, the following calculations proceed using the full average annual take-up rates recorded.

8.20 Using the full take-up rates and applying them to the period 2014-2034 (20 years), the following requirements are noted:

- Chorley – 3.82 ha/year x 20 (years) = **76.40 ha**
- Preston – 3.56 ha/year x 20 (years) = **71.20 ha**
- South Ribble – 3.54 ha/year x 20 (years) = **70.80 ha**

Central Lancashire total requirement – 218.40 ha

8.21 The three Boroughs should also have a buffer in supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2034 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2034. There is no set guidance on how long this buffer should be, however, in the 45 employment land studies completed by BE Group over the last decade, a buffer of five years has usually been applied, which equates to another 25 percent on the 20-year take up measure. This has been identified as an acceptable margin in Local Plan Examination's in Public, in which BE Group's employment needs assessments have been appraised. Based on the historic take-up trend this would generate the following further land needs:

- Chorley – 3.82 ha/year x 5 (years) = 19.10 ha
- Preston – 3.56 ha/year x 5 (years) = 17.80 ha
- South Ribble – 3.54 ha/year x 5 (years) = 17.70 ha.

8.22 Added to the 2034 need figure, this increases the requirement as follows:

- Chorley – 76.40 ha + 19.10 ha = **95.50 ha**
- Preston – 71.20 ha + 17.80 ha = **89.00 ha**
- South Ribble – 70.80 ha + 17.70 ha = **88.50 ha.**

Central Lancashire total requirement – 273.00 ha

8.23 Overall need of additional land can then be assessed through a comparison of current supply set against these figures.

8.24 At 31st March 2016, there was a realistic supply of 175.29 ha of available local land in Central Lancashire, plus a strategic supply of 58.37 ha at Cuerden and Samlesbury. Backdating for completions over 2014-2016 increases this to **188.43**.

8.25 Taken overall, therefore, Central Lancashire has a land supply shortfall of 23.86 ha. However, Model One is a measure of local needs only, assessing the past take-up that has occurred locally in Central Lancashire and projecting it forward to 2034. To assess like for like, assuming Cuerden and particularly Samlesbury are focused on meeting inward investment requirements, and allowing for the fact that Chorley and Preston do not have explicitly strategic sites, the above needs should be assessed against the realistic(backdated) local supply only. This could require the three Councils finding a further **84.57 ha** to meet local needs. Individually, the extra local requirements are:

- Chorley – 95.50 ha (need) – 59.75 ha (realistic supply, local only, backdated) = **35.75 ha (further need)**
- Preston – 89.00 ha (need) – 71.69 ha (realistic supply, local only, backdated) = **17.31 ha (further need)**
- South Ribble – 88.50 ha (need) – 56.99 ha (realistic supply, local only) = **31.51 ha (further need)**

Split by Use Class

8.26 Whilst overall need is important, further analysis can evaluate what the potential needs will be in the different use classes. Tables 37 to 39 use available Council monitoring to split the take-up by the main employment use classes (B1 (a, b, c), B2, B8), or a mix of some, or all, of these use classes. In the case of Preston, only very limited take-up by use class data is available and thus the resulting need by use class estimates should be considered indicative only.

Table 37 – Employment Land Take-Up Split – Chorley

| Year | Use Class | | | | | | Total |
|-----------|-----------|-------|-------|------|-------|--------|-------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| 2003-2004 | 0.98 | - | - | - | 5.75 | - | 6.73 |
| 2004-2005 | 0.23 | - | 0.16 | 2.28 | 0.24 | - | 2.91 |
| 2005-2006 | 0.96 | - | 1.35 | 0.20 | 10.04 | - | 12.55 |
| 2006-2007 | 0.56 | - | 0.03 | 0.16 | 0.74 | 9.42 | 10.91 |
| 2007-2008 | 1.88 | - | 0.29 | 1.78 | 1.60 | 6.60 | 12.15 |

| Year | Use Class | | | | | | Total |
|------------------------|-------------------------|-------|-----------------------|-----------------------|-------------------------|-------------------------|----------------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| 2008-2009 | 1.22 | - | 0.94 | 0.37 | - | - | 2.53 |
| 2009-2010 | 0.81 | - | 0.05 | 0.17 | 3.88 | 0.20 | 5.11 |
| 2010-2011 | 0.25 | - | 0.03 | 0.12 | 0.04 | 2.19 | 2.63 |
| 2011-2012 | 1.52 | - | 0.11 | 0.06 | 0.69 | - | 2.38 |
| 2012-2013 | 2.34 | - | - | 2.13 | 1.95 | 0.07 | 6.49 |
| 2013-2014 | 0.42 | - | 0.44 | 0.35 | 0.54 | 2.17 | 3.92 |
| 2014-2015 | 0.05 | - | 0.27 | 0.28 | 1.11 | - | 1.71 |
| 2015-2016 | 0.91 | - | 0.08 | - | - | 4.80 | 5.79 |
| Total (percent) | 12.13 (16.0) | - | 3.75 (4.9) | 7.9 (10.4) | 26.58 (35.1) | 25.45 (33.6) | 75.81 (100.0) |

Source: CBC, BE Group, 2017

*Mix of some, or all, B Use Classes.

Table 38 – Employment Land Take-Up Split – Preston*

| Year | Use Class | | | | | | Total |
|------------------------|------------------------|-------|-----------------------|------------------------|------------------------|---------|---------------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed** | |
| 2005-2006 | 0.43 | - | 0.20 | - | 0.11 | - | 0.74 |
| 2006-2007 | 0.71 | - | 0.05 | 0.17 | 0.39 | - | 1.32 |
| 2007-2008 | 1.05 | - | - | 0.28 | 0.32 | - | 1.65 |
| 2008-2009 | - | - | - | - | - | - | - |
| 2009-2010 | 0.85 | - | - | 1.63 | 0.35 | - | 2.83 |
| Total (percent) | 3.04 (46.5) | - | 0.25 (3.8) | 2.08 (31.8) | 1.17 (17.9) | - | 6.54 (100.0) |

Source: PCC, BE Group, 2017

*Use Class split estimated from a range of available monitoring documents. In many cases the available monitoring by use class, does not cover the entirety of the take-up recorded for that year. Thus, the totals shown in Table 38 do not match the annual take-up totals shown in Table 36 above for 2005/06 and 2007/08.

**Mix of some, or all, B Use Classes.

Table 39 – Employment Land Take-Up Split – South Ribble*

| Year | Use Class | | | | | | Total |
|-----------|-----------|-------|-------|------|------|---------|-------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed** | |
| 2004-2005 | 3.10 | - | - | 4.3 | 1.7 | 2.14 | 11.24 |
| 2005-2006 | 3.59 | - | - | 2.89 | 3.49 | - | 9.97 |
| 2006-2007 | 2.65 | - | 0.14 | 2.26 | 2.65 | - | 7.70 |
| 2007-2008 | 1.33 | - | - | 2.27 | 0.65 | - | 4.25 |
| 2008-2009 | - | - | - | - | - | - | 0.00 |
| 2009-2010 | - | - | - | - | - | - | 0.00 |

| Year | Use Class | | | | | | Total |
|------------------------|-------------------------|----------|-----------------------|-------------------------|-------------------------|-----------------------|----------------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed** | |
| 2010-2011 | 7.84 | - | - | 4.82 | 1.96 | - | 14.62 |
| 2011-2012 | 0.37 | - | - | - | 12.23 | - | 12.60 |
| 2012-2013 | 0.70 | - | - | - | - | - | 0.70 |
| 2013-2014 | - | - | - | - | - | - | 0.00 |
| 2014-2015 | - | - | - | - | - | - | 0.00 |
| Total (percent) | 19.58 (32.1) | - | 0.14 (0.2) | 16.54 (27.1) | 22.68 (37.1) | 2.14 (3.5) | 61.08 (100.0) |

Source: SRBC, BE Group, 2017

*Use Class split estimated from figures for completed floorspace provided in SRBC Annual Monitoring Reports

**Mix of some, or all, B Use Classes.

8.27 Therefore, projecting the historic split of land need forward for the period to 2034, for each local authority area, Tables 40 to 42 shows the anticipated need for the different use classes for the Local Take-Up Model. This is then compared to the current realistic employment land supply, as of 31st March 2016, as defined in Section 10.0 and split, in that section, by B1/B2/B8 uses and also now including the backdated element. The Further Need, by use class, for this model can then be identified.

Table 40 – Full Need, Split by Use Class – Chorley

| Period | Use Class | | | | | | Total (ha) |
|--|--------------|----------|-------|---------------|--------------|-------------|--------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| Percentage, percent | 16.00 | - | 4.90 | 10.40 | 35.10 | 33.60 | 100.00 |
| Local Take Up Trend, ha | 15.28 | - | 4.68 | 9.93 | 33.52 | 32.09 | 95.50 |
| 2016 Realistic Supply, by Use Class, backdated to 2014, ha | 1.76 | - | | 17.63 | 11.27 | 29.09 | 59.75 |
| Further Needs, ha | 13.52 | - | | (3.02) | 22.25 | 3.00 | 35.75 |

Source: CBC/BE Group, 2017

*Mix of some, or all, B Use Classes.

Table 41 – Full Need, Split by Use Class – Preston

| Period | Use Class | | | | | | Total (ha) |
|---------------------|-----------|-------|-------|-------|-------|--------|------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| Percentage, percent | 46.50 | - | 3.80 | 31.80 | 17.90 | - | 100.00 |

| Period | Use Class | | | | | | Total (ha) |
|--|--------------|-------|-------|----------------|---------------|--------|--------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| Local Take Up Trend, ha | 41.38 | - | 3.39 | 28.30 | 15.93 | - | 89.00 |
| 2016 Realistic Supply, by Use Class, backdated to 2014, ha | 0.47 | - | | 53.79 | 17.43 | - | 71.69 |
| Further Needs, ha | 40.91 | - | | (22.10) | (1.50) | - | 17.31 |

Source: PBC/BE Group, 2017

*Mix of some, or all, B Use Classes.

Table 42 – Full Need, Split by Use Class – South Ribble

| Period | Use Class | | | | | | Total (ha) |
|--|--------------|-------|-------|-------------|--------------|----------------|--------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed* | |
| Percentage | 32.10 | - | 0.20 | 27.10 | 37.10 | 3.50 | 100.00 |
| Local Take Up Trend, ha | 28.41 | | 0.18 | 23.98 | 32.83 | 3.10 | 88.50 |
| 2016 Realistic Supply, by Use Class, backdated to 2014, ha | 1.92 | - | | 21.78 | 10.93 | 22.36 | 56.99 |
| Further Needs, ha | 26.49 | - | | 2.38 | 21.90 | (19.26) | 31.51 |

Source: SRBC/BE Group, 2017

*Mix of some, or all, B Use Classes.

8.28 The above Tables show the following trends:

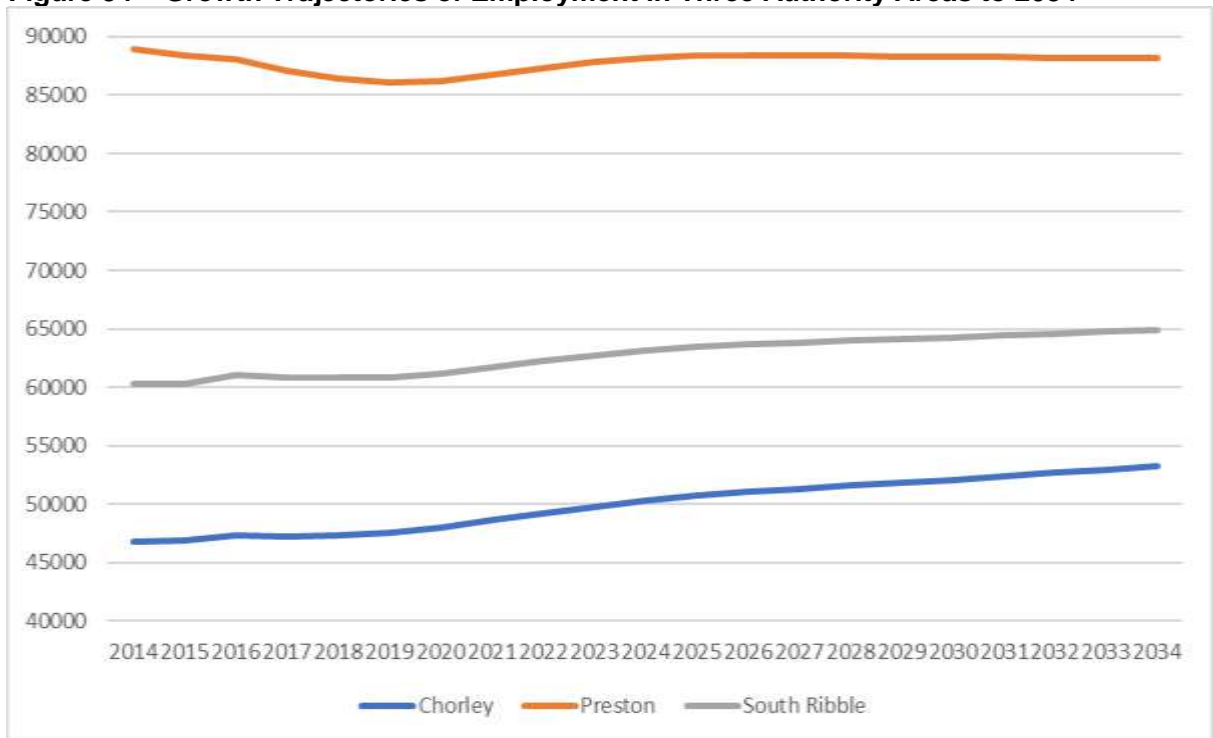
- Chorley – By this measure the greatest need, unlikely to be met in the current supply, is for land suitable for larger B2/B8 options. Some 13.50 ha of primarily office land is also required, while the Borough has sufficient land for smaller light industrial/industrial and warehouse options
- Preston – As noted, the data is more limited for Preston, however, the general trend is that Preston needs more sites suited for B1(a) offices, but has sufficient land for other industrial and warehouse uses
- South Ribble – As with Chorley, the need is for sites suiting both larger B2/B8 uses and B1(a) offices, with other needs mostly being met by the existing supply.

Model 2: Employment Forecasts

8.29 Employment forecasts were prepared by Oxford Economics in July 2016. These forecasts projected employment by sector to 2034 for the three authority areas.

8.30 Between 2014 and 2034, total employment in Central Lancashire is forecast to grow by approximately 10,276 jobs, an average of about 514 jobs per year. Over half of this jobs growth is anticipated to be in Chorley (+6,412 jobs), with South Ribble adding 4,671 jobs and Preston remaining seeing an overall loss (-808 jobs). Illustrated below is the growth trajectories for employment in each local authority area. As can be seen in the graph, Oxford Economics forecast a short-term decline in overall employment numbers in Preston, before returning to a level of negligible change from 2024 onwards.

Figure 34 – Growth Trajectories of Employment in Three Authority Areas to 2034



Source: Oxford Economics, 2016

Sector Level Forecasts

8.31 At a sector level, there are substantial differences in the forecast employment growth, as summarised by Table 42 for Central Lancashire.

8.32 Overall in Central Lancashire, it is projected that the largest employment growth sectors will be in construction (+4,158 jobs), human health and social work (+3,035) administrative and support services (+2,660), professional, scientific and technical

activities (+2,184), and wholesale and retail trade (+1,927).

- 8.33 The sectors anticipated to have the most significant declines in employment numbers between 2014 and 2034 in Central Lancashire are manufacturing (-2,867 jobs), public administration and defence (-2,830) and education (-536).

Table 43 – Employment Forecasts by Sector, Central Lancashire

| Sector | Total Employment | | |
|---|------------------|----------------|----------------|
| | 2014 | 2034 | Change 2014-34 |
| Agriculture, Forestry and Fishing | 1,883 | 1,621 | (262) |
| Mining and Quarrying | 59 | 28 | (31) |
| Manufacturing | 13,571 | 10,704 | (2,867) |
| Electricity, Gas, Steam and Air Conditioning Supply | 318 | 238 | (81) |
| Water supply, Sewerage, Waste Management and Remediation Activities | 2,492 | 2,080 | (412) |
| Construction | 21,313 | 25,471 | 4,158 |
| Wholesale and Retail Trade | 30,897 | 32,824 | 1,927 |
| Transportation and Storage | 7,415 | 7,208 | (207) |
| Accommodation and Food Service Activities | 10,127 | 11,750 | 1,623 |
| Information and Communication | 5,416 | 6,295 | 879 |
| Finance and Insurance | 2,942 | 2,788 | (154) |
| Real Estate | 3,051 | 3,210 | 159 |
| Professional, Scientific and Technical | 9,528 | 11,712 | 2,184 |
| Administrative and Support Service | 19,314 | 21,975 | 2,660 |
| Public Administration and Defence | 14,179 | 11,349 | (2,830) |
| Education | 14,226 | 13,690 | (536) |
| Human Health and Social Work | 29,984 | 33,019 | 3,035 |
| Arts, Entertainment and Recreation | 4,191 | 4,934 | 744 |
| Other Service Activities | 5,177 | 5,464 | 287 |
| Total | 196,083 | 206,359 | 10,276 |

Source: Oxford Economics, 2016

- 8.34 Therefore, in the public sector, there is a movement away from administrative and education employment and towards health and allied services. In the private sector, the long-term trend of declining manufacturing jobs, as is typical of most areas in the UK, is anticipated to continue, with growth focused in construction and a range of service industries.

8.35 There are anticipated to be differences in the sectoral growth trajectories between the three local authority areas. Oxford Economics' sectoral growth projections for the three areas are provided in Tables 44 to 46 below.

Table 44 – Employment Forecasts by Sector, Chorley

| Sector | Total Employment | | |
|---|------------------|---------------|----------------|
| | 2014 | 2034 | Change 2014-34 |
| Agriculture, Forestry & Fishing | 825 | 712 | (113) |
| Mining and Quarrying | 33 | 15 | (18) |
| Manufacturing | 2,605 | 2,048 | (558) |
| Electricity, Gas, Steam and Air Conditioning Supply | 0 | 0 | 0 |
| Water supply; Sewerage, Waste Management and Remediation Activities | 133 | 109 | (23) |
| Construction | 3,022 | 3,612 | 590 |
| Wholesale and Retail Trade | 6,797 | 7,309 | 512 |
| Transportation and Storage | 1,712 | 1,789 | 78 |
| Accommodation and Food Service Activities | 3,151 | 3,813 | 662 |
| Information and Communication | 1,573 | 1,800 | 227 |
| Finance and Insurance | 462 | 439 | (24) |
| Real Estate | 504 | 552 | 49 |
| Professional, Scientific and Technical | 2,831 | 3,852 | 1,021 |
| Administrative and Support Service | 6,762 | 8,245 | 1,483 |
| Public Administration and Defence | 1,360 | 1,186 | (174) |
| Education | 4,065 | 4,150 | 85 |
| Human Health and Social Work | 8,144 | 10,286 | 2,142 |
| Arts, Entertainment and Recreation | 1,147 | 1,419 | 271 |
| Other Service Activities | 1,685 | 1,887 | 202 |
| Total | 46,811 | 53,224 | 6,412 |

Source: Oxford Economics, 2016

Table 45 – Employment Forecasts by Sector, Preston

| Sector | Total Employment | | |
|---|------------------|---------------|-------------------|
| | 2014 | 2034 | Change 2014-34 |
| Agriculture, Forestry & Fishing | 533 | 458 | (75) |
| Mining and Quarrying | 20 | 10 | (10) |
| Manufacturing | 4,034 | 3,182 | (852) |
| Electricity, Gas, Steam and Air Conditioning Supply | 257 | 192 | (65) |
| Water supply; Sewerage, Waste Management and Remediation Activities | 307 | 255 | (51) |
| Construction | 4,600 | 5,141 | 542 |
| Wholesale and Retail Trade | 15,473 | 15,800 | 327 |
| Transportation and Storage | 3,131 | 2,862 | (268) |
| Accommodation and Food Service Activities | 4,380 | 4,679 | 299 |
| Information and Communication | 2,051 | 2,392 | 341 |
| Finance and Insurance | 2,155 | 2,042 | (113) |
| Real Estate | 1,564 | 1,543 | (21) |
| Professional, Scientific and Technical | 4,458 | 5,090 | 632 |
| Administrative and Support Service | 8,605 | 9,308 | 703 |
| Public Administration and Defence | 10,966 | 8,577 | (2,389) |
| Education | 6,311 | 5,793 | (518) |
| Human Health and Social Work | 15,804 | 16,316 | 511 |
| Arts, Entertainment and Recreation | 2,046 | 2,256 | 210 |
| Other Service Activities | 2,305 | 2,296 | (9) |
| Total | 89,000 | 88,192 | (808) |

Source: Oxford Economics, 2016

Table 46 – Employment Forecasts by Sector, South Ribble

| Sector | Total Employment | | |
|---|------------------|--------|-------------------|
| | 2014 | 2034 | Change 2014-34 |
| Agriculture, Forestry & Fishing | 525 | 451 | (75) |
| Mining and Quarrying | 6 | 3 | (3) |
| Manufacturing | 6,931 | 5,474 | (1,457) |
| Electricity, Gas, Steam and Air Conditioning Supply | 62 | 46 | (16) |
| Water supply; Sewerage, Waste Management and Remediation Activities | 2,053 | 1,715 | (338) |
| Construction | 13,691 | 16,718 | 3,027 |

| Sector | Total Employment | | |
|---|------------------|---------------|-------------------|
| | 2014 | 2034 | Change 2014-34 |
| Wholesale and Retail Trade | 8,627 | 9,715 | 1,088 |
| Transportation and Storage | 2,573 | 2,557 | (16) |
| Accommodation and Food Service Activities | 2,597 | 3,258 | 661 |
| Information and Communication | 1,791 | 2,103 | 312 |
| Finance and Insurance | 325 | 308 | (17) |
| Real Estate | 983 | 1,114 | 131 |
| Professional, Scientific and Technical | 2,239 | 2,771 | 531 |
| Administrative and Support Service | 3,947 | 4,422 | 475 |
| Public Administration and Defence | 1,854 | 1,587 | (267) |
| Education | 3,850 | 3,746 | (103) |
| Human Health and Social Work | 6,035 | 6,417 | 382 |
| Arts, Entertainment and Recreation | 997 | 1,260 | 263 |
| Other Service Activities | 1,186 | 1,281 | 94 |
| Total | 60,271 | 64,943 | 4,671 |

Source: Oxford Economics, 2016

8.36 The following key points are noted from these sectoral projections for the three areas:

- The direction of growth (positive or negative) is consistent for the larger sectors throughout the three local authority areas
- The large Central Lancashire region growth in construction is primarily being driven by South Ribble (+3,027 jobs), which accounts for 73 percent of the region's construction employment growth to 2034
- Chorley Borough is projected to drive growth in the human health and social work sector in Central Lancashire, adding some 2,142 jobs or 71 percent of the region's jobs growth. This supports the Digital Health Park proposals on Euxton Lane. Both Preston and South Ribble are anticipated to have modest positive growth in this sector to 2034
- The decline in the region's manufacturing sector is forecast to be most pronounced in South Ribble (around half of total job losses) although all local authority areas are expected to have a declining manufacturing workforce
- Preston is forecast to experience the largest decline in the public administration and defence sector, losing 2,389 jobs or 84 percent of Central Lancashire's sectoral losses. Both other authority areas are expected to have modest declines
- The three largest growth sectors in Chorley are anticipated to be

administrative and support services, human health and social work and professional, scientific and technical activities. In Preston, the three largest growth sectors are projected to be administrative and support services, professional, scientific and technical activities and construction. In South Ribble, the three sectors are projected to be construction, professional, scientific and technical and wholesale and retail trade.

Implications for B-Class Land

8.37 Not all employment growth would result in an increase in demand for B-class employment land or premises. Only certain industry sectors are typically located on B-class land, such as manufacturing, transport and storage and professional services. The next stage of this analysis projects the likely proportions of sectoral employment growth to be located on B-class employment sites.

8.38 Using the Oxford Economics forecasts, the BE Group has forecast employment floorspace and employment land requirements for Central Lancashire and its constituent local authorities. The methodology of calculating this requirement is as follows:

- Identify which industry sectors are likely to take up employment land, including the proportion of that sector’s employment on B-class employment land
- Adopt the Homes and Communities Agency’s (HCA) employment densities as outlined in the Employment Density Guide Third Edition (2015) to convert employment numbers to floorspace demand
- Adopt a plot ratio of 39 percent to convert floorspace to employment land demand.

Table 47 – Model Assumptions

| Sectors | Employment | | |
|---------------|-------------------------------------|----------------------------|--|
| | Percentage Occupying B-Class, space | Floorspace per person, sqm | Comments |
| Agriculture | 5 | 12 | Managerial, admin |
| Manufacturing | 100 | 36 | HCA gives a range from 36-47 sqm/job. Higher density reflects largely B2; a lower density can be applied to B1 light industry. Given the manufacturing mix in Central Lancashire, the general industrial density has been adopted (36 sqm/job) |

| Sectors | Employment | | |
|-------------------------------|-------------------------------------|----------------------------|--|
| | Percentage Occupying B-Class, space | Floorspace per person, sqm | Comments |
| Utilities | 26 | 12 | Managerial, admin components of sector taking office locations |
| Construction | 26 | 12 | Managerial, admin components of sector taking office locations |
| Distribution | 48 | 70 | Warehouses, offices-non large scale/high bay facilities. HCA provides a range of 70-95 sqm/job. Range reflects final mile distribution centres (70 sqm/job), regional distribution centres (77 sqm/job) and national distribution centres (95 sqm/job). Assume 70 sqm/job for this analysis. |
| Transport | 48 | 70 | Warehouses, offices-non large scale/high bay facilities. Same range as Distribution and same assumed level adopted. |
| Financial and Business | 100 | 10-12 | HCA guide reports higher job densities in finance and insurance sector (10 sqm/job) than other office based sectors (12 sqm/job) |
| Government and Other Services | 22 | 12 | Local Government, Public Administration |

Source: HCA, 2015, BE Group 2017

8.39 Using the above assumptions, applied to the Oxford Economics forecasts, the B-class floorspace and land requirements have been calculated by sector, summarised in Table 48 for Central Lancashire. The large projected decline in employment in the manufacturing sector is heavily influencing the calculations of floorspace and land demand.

Table 48 – Forecast Employment Land and Floorspace Demand based on Oxford Economics Forecasts 2014-2034 – Central Lancashire

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (262) | 5 | (13) | 12 | (157) |
| Mining and Quarrying | (31) | 5 | (2) | 12 | (19) |
| Manufacturing | (2,867) | 100 | (2,867) | 36 | (103,212) |
| Electricity, Gas, Steam and Air Conditioning Supply | (81) | 26 | (21) | 12 | (253) |
| Water supply; Sewerage, Waste Management and Remediation Activities | (412) | 26 | (107) | 12 | (1,285) |
| Construction | 4,158 | 26 | 1,081 | 12 | 12,973 |
| Wholesale and Retail Trade | 1,927 | 5 | 96 | 70 | 6,745 |
| Transportation and Storage | (207) | 48 | (99) | 70 | (6,955) |
| Accommodation and Food Service Activities | 1,623 | 0 | - | | - |
| Information and Communication | 879 | 100 | 879 | 11 | 9,669 |
| Finance and Insurance | (154) | 100 | (154) | 10 | (1,540) |
| Real Estate | 159 | 100 | 159 | 12 | 1,908 |
| Professional, Scientific and Technical | 2,184 | 100 | 2,184 | 12 | 26,208 |
| Administrative and Support Service | 2,660 | 100 | 2,660 | 12 | 31,920 |
| Public Administration and Defence | (2,830) | 22 | (623) | 12 | (7,471) |
| Education | (536) | 0 | - | | - |
| Human Health and Social Work | 3,035 | 5 | 152 | 12 | 1,821 |
| Arts, Entertainment and Recreation | 744 | 0 | - | | - |
| Other Service Activities | 287 | 22 | 63 | 12 | 758 |
| Total | 10,276 | | 3,389 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 85,046 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (113,937) |
| Net Change in Floorspace Demand (sqm) | | | | | (28,891) |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 21.8 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (29.2) |
| Equivalent Employment Land Needed – Net (ha) | | | | | (7.4) |

Source: BE Group, 2017

- 8.40 The analysis of B-class floorspace and land demand generated from forecast overall employment growth reveals an anticipated small decline in B-class land demand below 2014 levels of 28,891 sqm of floorspace or 7.4 ha of land. This is due to growth in demand driven by office based sectors being more than offset by the decline in demand for manufacturing floorspace.
- 8.41 Focussing just on the growing sectors – the analysis shows that these sectors have a demand for some 85,046 sqm of floorspace or 21.8 ha of employment land. Looking at growth sectors only can be useful for the planning of employment land and floorspace as declining sectors may not release floorspace for growth sectors in a timely manner, or at all, and the types of floorspace may be inappropriate for the growth sectors. Therefore, it is an unwise assumption to consider that the demand from the growing sectors would be met by the release of floorspace and land from the declining sectors.
- 8.42 Critically, this methodology relies on the assumption of a constant sqm floorspace/job over the forecast period. With productivity improvements through automation, streamlining of processes or component outsourcing, this is unlikely to be correct. Considering the historic performance of the manufacturing sector over many decades, there has been a substantial increase in output per worker due to automation, technology and improved processes, which has resulted in some manufacturing areas declining in number of workers, yet continuing to operate and grow in the region.
- 8.43 Therefore, it is unreasonable to assume that a decline in a sector’s workforce would necessarily lead to a commensurate decline in the floorspace of that sector, as a declining workforce is not necessarily due to lower production levels. Businesses would require floorspace for additional plant and machinery for automated processes and increased storage capacity and therefore, while they may reduce their workforce, may not reduce (or indeed may increase) their floorspace. Furthermore, due to the business disruption of relocating premises, even if a business did have lower floorspace needs as their workforce declined, there would still be a considerable lag between the reduction of the workforce and the reduction of the floorspace.
- 8.44 Tables 49 to 51 are the equivalent floorspace and employment land analyses for the three local authority areas.

Table 49 – Forecast Employment Land and Floorspace Demand based on Oxford Economics Forecasts 2014-2034 – Chorley

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (113) | 5 | (6) | 12 | (68) |
| Mining and Quarrying | (18) | 5 | (1) | 12 | (11) |
| Manufacturing | (558) | 100 | (558) | 36 | (20,088) |
| Electricity, Gas, Steam and Air Conditioning Supply | 0 | 26 | - | 12 | - |
| Water supply; Sewerage, Waste Management and Remediation Activities | (23) | 26 | (6) | 12 | (72) |
| Construction | 590 | 26 | 153 | 12 | 1,841 |
| Wholesale and Retail Trade | 512 | 5 | 26 | 70 | 1,792 |
| Transportation and Storage | 78 | 48 | 37 | 70 | 2,621 |
| Accommodation and Food Service Activities | 662 | 0 | - | | - |
| Information and Communication | 227 | 100 | 227 | 11 | 2,497 |
| Finance and Insurance | (24) | 100 | (24) | 10 | (240) |
| Real Estate | 49 | 100 | 49 | 12 | 588 |
| Professional, Scientific and Technical | 1,021 | 100 | 1,021 | 12 | 12,252 |
| Administrative and Support Service | 1,483 | 100 | 1,483 | 12 | 17,796 |
| Public Administration and Defence | (174) | 22 | (38) | 12 | (459) |
| Education | 85 | 0 | - | | - |
| Human Health and Social Work | 2,142 | 5 | 107 | 12 | 1,285 |
| Arts, Entertainment and Recreation | 271 | 0 | - | | - |
| Other Service Activities | 202 | 22 | 44 | 12 | 533 |
| Total | 6,412 | | 2,515 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 41,205 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (20,938) |
| Net Change in Floorspace Demand (sqm) | | | | | 20,267 |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 10.6 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (5.4) |
| Equivalent Employment Land Needed – Net (ha) | | | | | 5.2 |

Source: BE Group, 2017

Table 50 – Forecast Employment Land and Floorspace Demand based on Oxford Economics Forecasts 2014-2034 – Preston

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (75) | 5 | (4) | 12 | (45) |
| Mining and Quarrying | (10) | 5 | (1) | 12 | (6) |
| Manufacturing | (852) | 100 | (852) | 36 | (30,672) |
| Electricity, Gas, Steam and Air Conditioning Supply | (65) | 26 | (17) | 12 | (203) |
| Water supply; Sewerage, Waste Management and Remediation Activities | (51) | 26 | (13) | 12 | (159) |
| Construction | 542 | 26 | 141 | 12 | 1,691 |
| Wholesale and Retail Trade | 327 | 5 | 16 | 70 | 1,145 |
| Transportation and Storage | (268) | 48 | (129) | 70 | (9,005) |
| Accommodation and Food Service Activities | 299 | 0 | - | | - |
| Information and Communication | 341 | 100 | 341 | 11 | 3,751 |
| Finance and Insurance | (113) | 100 | (113) | 10 | (1,130) |
| Real Estate | (21) | 100 | (21) | 12 | (252) |
| Professional, Scientific and Technical | 632 | 100 | 632 | 12 | 7,584 |
| Administrative and Support Service | 703 | 100 | 703 | 12 | 8,436 |
| Public Administration and Defence | (2,389) | 22 | (526) | 12 | (6,307) |
| Education | (518) | 0 | - | | - |
| Human Health and Social Work | 511 | 5 | 26 | 12 | 307 |
| Arts, Entertainment and Recreation | 210 | 0 | - | | - |
| Other Service Activities | (9) | 22 | (2) | 12 | (24) |
| Total | (808) | | 182 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 22,637 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (47,527) |
| Net Change in Floorspace Demand (sqm) | | | | | (24,889) |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 5.8 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (12.2) |
| Equivalent Employment Land Needed – Net (ha) | | | | | (6.4) |

Source: BE Group, 2017

Table 51 – Forecast Employment Land and Floorspace Demand based on Oxford Economics Forecasts 2014-2034 – South Ribble

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (75) | 5 | (4) | 12 | (45) |
| Mining and Quarrying | (3) | 5 | (0) | 12 | (2) |
| Manufacturing | (1,457) | 100 | (1,457) | 36 | (52,452) |
| Electricity, Gas, Steam and Air Conditioning Supply | (16) | 26 | (4) | 12 | (50) |
| Water supply; Sewerage, Waste Management and Remediation Activities | (338) | 26 | (88) | 12 | (1,055) |
| Construction | 3,027 | 26 | 787 | 12 | 9,444 |
| Wholesale and Retail Trade | 1,088 | 5 | 54 | 70 | 3,808 |
| Transportation and Storage | (16) | 48 | (8) | 70 | (538) |
| Accommodation and Food Service Activities | 661 | 0 | - | | - |
| Information and Communication | 312 | 100 | 312 | 11 | 3,432 |
| Finance and Insurance | (17) | 100 | (17) | 10 | (170) |
| Real Estate | 131 | 100 | 131 | 12 | 1,572 |
| Professional, Scientific and Technical | 531 | 100 | 531 | 12 | 6,372 |
| Administrative and Support Service | 475 | 100 | 475 | 12 | 5,700 |
| Public Administration and Defence | (267) | 22 | (59) | 12 | (705) |
| Education | (103) | 0 | - | | - |
| Human Health and Social Work | 382 | 5 | 19 | 12 | 229 |
| Arts, Entertainment and Recreation | 263 | 0 | - | | - |
| Other Service Activities | 94 | 22 | 21 | 12 | 248 |
| Total | 4,671 | | 694 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 30,806 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (55,016) |
| Net Change in Floorspace Demand (sqm) | | | | | (24,210) |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 7.9 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (14.1) |
| Equivalent Employment Land Needed – Net (ha) | | | | | (6.2) |

Source: BE Group, 2017

- 8.45 Of the three authorities, only Chorley is forecast to have a net positive level of floorspace and employment land demand using this model, at about 20,267 sqm of floorspace and 5.2 ha of land. This is due to Chorley's relatively low level of decline in the manufacturing sector, compared to the other areas.
- 8.46 Looking at growth sectors only, Chorley is forecast to have the largest demand for employment land to 2034 at 10.6 ha, with Preston (6.4 ha) and South Ribble (6.2 ha) forecast to have similar land demands.
- 8.47 The above analysis would be considered a baseline level of demand generated by employment changes in the three local authority areas. That is, if employment growth was to continue on trend, with unchanging levels of job densities, the floorspace and land requirements would be as detailed above.

Policy On Forecasting

- 8.48 Success of the strategic interventions through the City Deal would mean that growth in employment, and therefore employment land demand, will be over and above the baseline demand forecast above. Therefore, revised, 'policy-on' forecasts have been prepared for Preston and South Ribble (where the strategic interventions would occur) that reflect the additional impetus that the City Deal could provide for overall employment growth. While Chorley will enjoy indirect benefits from City Deal and the two strategic sites, it is not possible to quantify exactly what level of benefit might be accrued locally and prepare a further policy on forecast for Chorley Borough.
- 8.49 The City Deal will deliver additional housing to the area, which will have implications for employment demand and opportunities. Boosting housing delivery will have direct impacts on construction jobs, but also flow-on benefits to consumer driven sectors due to the higher population in the area. The City Deal's strategic interventions to open up employment areas (e.g. Cuerden) will provide impetus to warehousing and manufacturing sectors over and above the baseline forecasts.
- 8.50 The Enterprise Zone at Samlesbury also has substantial capacity for jobs growth, which will have implications for the overall employment take-up in the area. While this Enterprise Zone has not seen significant growth in recent years, it is expected that over the forecast period significant specialised manufacturing jobs would be created. This would have benefits for the supply chain in the area, most notably in Preston and South Ribble.

8.51 Quantifying additional employment by sector due to such strategic interventions is difficult and imprecise. BE Group has prepared policy on land and floorspace forecasts using the same approach as for the baseline employment-led demand modelling. The following have also been considered in developing the policy on forecasts:

- The overall parameters of the City Deal, including objectives for housing and jobs growth to deliver 17,000 new dwellings and 20,000 new jobs over a ten-year period from 2013.
- Information where available on the likely jobs capacity at strategic employment sites at Cuerden and Samlesbury, including a masterplan schedule for Cuerden, set out in the latest Outline planning application, for some 80,000 sqm of industrial/logistics space and 26,000 sqm of offices and Samlesbury's Enterprise Zone application, which while somewhat dated now provides an indication of overall development intents. It was assumed that the displacement factor for these jobs from other locations in the local authority areas would be very low due to the strategic nature of the sites.
- It is assumed that the growth sectors in the baseline forecasts will get an additional impetus due to the higher population growth in Preston and South Ribble due to the City Deal, estimated to be 25 percent above the projected growth.
- Furthermore, specific sectors, such as construction, transportation and storage, manufacturing and office-based support services would have an impetus due to the interventions to support the roll-out of employment land. This boost will not be uniform across sectors or areas and it is expected that South Ribble's impetus would be focussed around construction, transportation and storage and manufacturing and Preston's impetus would be more focussed on office based support sectors (although industrial uses would still see some uplift). The uplift is assumed to be between 5 and 20 percent above baseline levels.

8.52 Tables 52 and 53 provide the policy on forecasts for Preston and South Ribble respectively.

Table 52 – Policy On Forecast Employment Land and Floorspace Demand 2014-2034 – Preston

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (47) | 5 | (2) | 12 | (28) |
| Mining and Quarrying | (11) | 5 | (1) | 12 | (7) |
| Manufacturing | 776 | 100 | 776 | 36 | 27,936 |
| Electricity, Gas, Steam and Air Conditioning Supply | (69) | 26 | 18 | 12 | (215) |
| Water supply; Sewerage, Waste Management and Remediation Activities | (50) | 26 | (13) | 12 | (156) |
| Construction | 920 | 26 | 239 | 12 | 2,870 |
| Wholesale and Retail Trade | 241 | 5 | 12 | 70 | 844 |
| Transportation and Storage | (101) | 48 | (48) | 70 | (3,394) |
| Accommodation and Food Service Activities | 733 | 0 | - | | - |
| Information and Communication | 574 | 100 | 574 | 11 | 6,314 |
| Finance and Insurance | 25 | 100 | 25 | 10 | 250 |
| Real Estate | (225) | 100 | (225) | 12 | (2,700) |
| Professional, Scientific and Technical | 1,206 | 100 | 1,206 | 12 | 14,472 |
| Administrative and Support Service | 407 | 100 | 407 | 12 | 4,884 |
| Public Administration and Defence | (2,547) | 22 | (560) | 12 | (6,724) |
| Education | -462 | 0 | - | | - |
| Human Health and Social Work | 1,202 | 5 | 60 | 12 | 721 |
| Arts, Entertainment and Recreation | 248 | 0 | - | | - |
| Other Service Activities | (88) | 22 | (19) | 12 | (232) |
| Total | 2,732 | | 2,412 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 58,291 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (13,456) |
| Net Change in Floorspace Demand (sqm) | | | | | 44,835 |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 14.9 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (3.5) |
| Equivalent Employment Land Needed – Net (ha) | | | | | 11.5 |

Source: BE Group, 2017

Table 53 – Policy On Forecast Employment Land and Floorspace Demand 2014-2034 – South Ribble

| SIC Group | Workforce Growth 2014-34 | Percentage Occupying B1/2/8 Space | Growth Number of Jobs on B1/2/8 Space | Floorspace Per Job, sqm | Floorspace Required, sqm |
|---|--------------------------|-----------------------------------|---------------------------------------|-------------------------|--------------------------|
| Agriculture, Forestry and Fishing | (50) | 5 | (3) | 12 | (30) |
| Mining and Quarrying | (3) | 5 | (0) | 12 | (2) |
| Manufacturing | 1,510 | 100 | 1,510 | 36 | 54,360 |
| Electricity, Gas, Steam and Air Conditioning Supply | (17) | 26 | (4) | 12 | (53) |
| Water supply; Sewerage, Waste Management and Remediation Activities | (321) | 26 | (83) | 12 | (1,002) |
| Construction | 4,809 | 26 | 1,250 | 12 | 15,004 |
| Wholesale and Retail Trade | 2,667 | 5 | 133 | 70 | 9,335 |
| Transportation and Storage | 1,174 | 48 | 564 | 70 | 39,446 |
| Accommodation and Food Service Activities | 1,965 | 0 | - | | - |
| Information and Communication | 1,065 | 100 | 1,065 | 11 | 11,715 |
| Finance and Insurance | 392 | 100 | 392 | 10 | 3,920 |
| Real Estate | 482 | 100 | 482 | 12 | 5,784 |
| Professional, Scientific and Technical | 1,410 | 100 | 1,410 | 12 | 16,920 |
| Administrative and Support Service | 4,189 | 100 | 4,189 | 12 | 50,268 |
| Public Administration and Defence | (107) | 22 | (24) | 12 | (282) |
| Education | (118) | 0 | - | | - |
| Human Health and Social Work | 662 | 5 | 33 | 12 | 397 |
| Arts, Entertainment and Recreation | 392 | 0 | - | | - |
| Other Service Activities | 150 | 22 | 33 | 12 | 396 |
| Total | 20,251 | | 10,947 | | |
| Increase in Floorspace – Growth Sectors (sqm) | | | | | 207,545 |
| Decline in Floorspace – Declining Sectors (sqm) | | | | | (1,369) |
| Net Change in Floorspace Demand (sqm) | | | | | 206,176 |
| Assumed Developable Floorspace per Hectare (sqm/ha) | | | | | 3,900 |
| Equivalent Employment Land Needed – Growth Sectors (ha) | | | | | 53.2 |
| Equivalent Employment Land Needed – Declining Sectors (ha) | | | | | (0.4) |
| Equivalent Employment Land Needed – Net (ha) | | | | | 52.9 |

Source: BE Group, 2017

8.53 This policy on approach results in a net positive land demand for both Preston (11.5 ha) and South Ribble (52.9 ha). This is a change of 17.9 ha for Preston and 59.1 ha for South Ribble over the baseline forecasts. South Ribble has a much higher level of change over the baseline level due to Cuerden and Samlesbury, which are delivered within South Ribble.

Employment Land Take-Up/Employment Change Comparison

8.54 In reality the employment change does not translate to land provision in the way set out in the above employment-based models, both policy-on and policy-off. There are several factors that will influence the land requirement and it is necessary to understand the market signals to predict a more accurate employment land requirement. These factors include:

- To what extent the growth in office employment takes place in town centre locations, at higher densities, rather than in low-density business parks. Preston, for example, will see both higher density development in the City Centre and lower density development in North East Preston. Where growth is predicted in town or city centres different densities would be applied, closer to 100 percent site coverage.
- Will the decline in jobs lead to the release of land? As noted previously, experience suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvement and change. Where jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.
- Land take-up/property needs can be for different reasons such as modernisation or geographic relocation, land banking for future needs.
- Expansion may also be within existing premises or on expansion land not accounted for in land allocations.

8.55 Therefore, to test how closely jobs change translates to land take-up, historic trends have been compared for South Ribble. Using the same methodology, the land needs based on employment change has been calculated for two historic periods. For this analysis, just baseline (policy-off) forecasts are used as the relevant strategic initiatives had yet to be implemented during the bulk of these historic periods.

- The long-term period from 1991-2016 and compared to the actual land take-up during that period (Table 54)

- 2001-2007 which was a period of sustained economic growth nationally (Table 54).

Table 54 – Employment Land Take-Up/Employment Change Comparison 1991-2016 – South Ribble

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 25,900 | 24.2 |
| Decline | (9300) | (72.1) |
| Net growth | 16,600 | (47.9) |
| Historic land take-up | - | 88.50 |

Source: BE Group, Oxford Economics, SRBC 2017

Table 55 – Employment Land Take-Up/Employment Change Comparison 2001-2007 – South Ribble

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 6900 | 1.80 |
| Decline | (2700) | (11.0) |
| Net growth | 4200 | (9.20) |
| Historic land take-up | - | 34.68 |

Source: BE Group, Oxford Economics, SRBC 2017

- 8.56 The two tables show that low net jobs growth during both periods, would have resulted in negative land needs, the result of large projected declines in manufacturing employment. Even if the sectors predicted to grow only are considered, the projected land requirements represent only a fraction of what was taken up.
- 8.57 Equivalent exercises are completed for Chorley and Preston in Tables 56-59 and show the same basic trends. In the case of Chorley, forecast jobs growth is primarily in health and service sectors, which have modest B-Class land needs. Declines are in manufacturing, which has larger B-Class land requirements. For this reason, as with South Ribble, the healthy projected jobs growth does not offset losses in terms of employment land needed.

Table 56 – Employment Land Take-Up/Employment Change Comparison 1991-2016 – Chorley

| Employment Change | Total Jobs | Land (Ha) |
|-----------------------|--------------|--------------|
| Growth | 14,916 | 27.3 |
| Decline | (6,541) | (28.9) |
| Net growth | 8,375 | (1.6) |
| Historic land take-up | - | 95.60 |

Source: BE Group, Oxford Economics, CBC 2017

Table 57 – Employment Land Take-Up/Employment Change Comparison 2001-2007 – Chorley

| Employment Change | Total Jobs | Land (Ha) |
|-----------------------|--------------|--------------|
| Growth | 8,828 | 17.1 |
| Decline | (1,642) | (9.9) |
| Net growth | 7,186 | 7.2 |
| Historic land take-up | - | 47.23 |

Source: BE Group, Oxford Economics, CBC 2017

Table 58 – Employment Land Take-Up/Employment Change Comparison 1991-2016 – Preston

| Employment Change | Total Jobs | Land (Ha) |
|-----------------------|-------------|---------------|
| Growth | 17,067 | 24.7 |
| Decline | (17,138) | (93.2) |
| Net growth | (71) | (68.5) |
| Historic land take-up | - | 81.98 |

Source: BE Group, Oxford Economics, PCC 2017

Table 59 – Employment Land Take-Up/Employment Change Comparison 2001-2007 – Preston

| Employment Change | Total Jobs | Land (Ha) |
|-----------------------|---------------|---------------|
| Growth | 19,591 | 46.4 |
| Decline | (5,747) | (9.1) |
| Net growth | 13,844 | 37.2 |
| Historic land take-up | - | 23.55* |

Source: BE Group, Oxford Economics, PCC 2017

*There is no annual take up breakdown for the years 2001/02-2003/04, for Preston, rather monitoring provides an overall completion for 1998-2004. To allow this 2001-2007 analysis to be undertaken, the 1998-2004 take up figure of 26.99 ha has been divided evenly over those six years, to create an average take up rate of 4.50 ha/year. This has then been added to years where take up is available on an annual basis to create an indicative take up over 2001-2007 of 23.55 ha.

- 8.58 In the case of Preston, the 2001-2007 exercise does come somewhat closer with projected needs of 37.2 ha against an indicative real world take up rate of 23.55 ha. This reflects the fact that the forecast does suggest a gain in manufacturing employment for the City in the early 2000s. However, when the whole 1991-2016 period is considered, forecasts and reality diverge sharply, with forecast losses of 68.5 ha and real-world gains of around 82 ha. The large difference reflects that fact that Oxford Economic forecast that Preston would lose over 8,000 manufacturing jobs between 2002 and 2016, losses that would not be offset, in terms of B-Class land, by increases in service sector and public-sector employment.
- 8.59 Thus, the trend shows that net jobs growth is not an accurate method of calculating land. **Even when land is calculated on the sectors that generate a positive jobs figure over the two periods, there is still a significant difference between the anticipated take-up from a jobs calculation and the actual market take up. An allowance for strategic growth only slightly addresses this. This calculation reinforces the view that historic take-up is the most appropriate method.**

Summary

- 8.60 Three alternative forecast options have been produced and considered for the period of 2014-2034, for the three Boroughs of Central Lancashire. The calculations for each are summarised in Table 60 and show varied outcomes.
- 8.61 The scenarios outlined are based on the adjusted land availability where sites considered undeliverable (or deliverable only for specific companies), or already developed, are excluded. A distinction is made between the realistic local supply of employment land and the strategic supply at Cuerden/Samlesbury. The total land realistic supply for Central Lancashire, as noted in Section 10.0 is 175.29 ha, the strategic supply is 58.37 ha.
- 8.62 However, to allow for the difference between the need (2014) and supply (2016) base dates, take up achieved by the three local authority areas over 2014/15 and 2015/16 is added back into the supply. Thus the 2014 supply position in Central Lancashire is 188.43 ha, comprising:
- Chorley: 59.75 ha (backdated supply)
 - Preston: 71.69 ha (backdated supply)
 - South Ribble: 56.99 ha (backdated supply).

- 8.63 The first scenario measures local land take-up, over the last 25 years, onwards to 2034 for each local authority area, and then measures it against local only supply. A scenario for strategic take up is not possible since there have been no B-Class completions at Cuerden and little at Samlesbury to date.
- 8.64 The figures also allow for a five-year buffer to allow for choice and potential change in needs during the study period as well as accounting for further possible losses in the supply.
- 8.65 If employment based forecasts are taken then there is a need of up to 21.8 ha across Central Lancashire, under a baseline, Policy-Off, forecast. The Borough specific targets range from 10.60 ha in Chorley, to 7.90 ha in South Ribble and 5.80 ha in Preston, where sectors predicted to grow only are considered.
- 8.66 Further scenarios have been prepared for Preston and South Ribble, which adjust the baseline Oxford Economics forecast, to allow for the impact of City Deal and known jobs forecasts for Cuerden/Samlesbury. This provides a mixed local/strategic forecast of 14.90 ha for Preston and 53.20 ha for South Ribble, the latter reflecting the fact that Cuerden/Samlesbury fall wholly within South Ribble Borough. Deducting local baseline requirements from policy-on requirements suggests that strategic only needs are around 9 ha in Preston and 45 ha in South Ribble, to 2034. Under all of the above employment forecasts, all three authorities have ample land, both local and strategic, to meet needs.
- 8.67 However, from the market assessment and reviewing the historic trends in employment change and land take up, it is suggested that employment land needs are underestimated in both policy-on and policy-off forecast models. When a comparison of past employment change over the period 1991-2016 and 2001-2007 periods is made, actual land take-up is usually many times more than the estimate put forward by the growth only approach.

Table 60 – Central Lancashire Land Forecast Models – Summary

| Local Authority | Model | A: Land Stock 2016, ha – Strategic and/or Local Supply* | B: Land Need 2014-2034, ha | C: Buffer (five years further need), ha | D: Surplus (Shortfall), ha $D=A-(B+C)$ | Assumptions |
|-----------------|---------------|---|----------------------------|---|---|-----------------------|
| Chorley | Local Take Up | 59.75 Local | 76.40 | 19.10 | (35.75) | Based on historic (25 |

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| Local Authority | Model | A: Land Stock 2016, ha – Strategic and/or Local Supply* | B: Land Need 2014-2034, ha | C: Buffer (five years further need), ha | D: Surplus (Shortfall), ha $D=A-(B+C)$ | Assumptions |
|-----------------|---|--|--------------------------------|---|---|---|
| | | Supply, backdated | | | | years) take-up of 3.82 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 59.75 Local Supply, backdated | +10.60 Growth +5.20 Change | +2.65 +1.30 | 1) 46.50 2) 53.25 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | - | - | - | - | - | - |
| Preston | Local Take Up | 71.69 Local Supply, backdated | 71.20 | 17.80 | (17.31) | Based on historic (23 years) take-up of 3.56 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 71.69 Local Supply, backdated | +5.80 Growth -6.40 Change | +1.45 N/A | 1) 64.44 2) 78.09 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | Employment based on adjusted stock – Policy-On Model | 71.69 Local Supply, backdated (with strategic sites in SR) | +14.90 Growth +11.50 Change | +3.73 +2.88 | 1) 53.06 2) 57.31 | Based on 1) projected growth sectors 2) projected employment change across sectors A local/strategic growth scenario |
| South Ribble | Local Take Up | 56.99 Local Supply, backdated | 70.80 | 17.70 | (31.51) | Based on historic (25 years) take-up of 3.54 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 56.99 Local Supply, backdated | +7.90 Growth -6.20 Change | +1.98 N/A | 1) 47.11 2) 63.19 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | Employment based on adjusted stock – Policy-On Model | 115.36 Strategic/Local Supply, backdated | +53.20 Growth +52.90 | +13.30 +13.23 | 1) 48.86 2) 49.23 | Based on 1) projected growth sectors 2) projected employment |

| Local Authority | Model | A: Land Stock 2016, ha – Strategic and/or Local Supply* | B: Land Need 2014-2034, ha | C: Buffer (five years further need), ha | D: Surplus (Shortfall), ha $D=A-(B+C)$ | Assumptions |
|-----------------|-------|---|----------------------------|---|---|--|
| | | | Change | | | change across sectors A local/strategic growth scenario |

Source: BE Group, 2017

*Backdated land supply at 2014

8.68 In conclusion, it is considered that the most appropriate forecasts is the Local Take-Up Scenario. Although this does not permit consideration of strategic requirements at Cuerden/Samlesbury, it does accurately measure local needs and suggests that each authority does require additional local land to 2034, against the realistic supply, comprising:

- Chorley – 35.75 ha further need
- Preston – 17.31 ha further need
- South Ribble – 31.51 ha further need.

8.69 Central Lancashire’s previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8 – and then compared to an equivalent split of the realistic local land supply from Section 10.0. This identifies the following main gaps:

- Chorley – Larger B2/B8 options. Some 13.50 ha of primarily B1(a) office land is also required,
- Preston – Preston needs more sites suited for B1(a) offices, but has sufficient land for other industrial and warehouse uses
- South Ribble – Sites suiting both larger B2/B8 uses and B1(a) offices.

9.0 DEMAND ASSESSMENT – LAND NEEDS OF NON-B CLASS USES

Introduction

9.1 Reflecting a wider definition of economic development this section considers, as far as is possible, future requirements for land from non-B class sectors that are also employment generators.

9.2 For this study, the following broad sectors have been identified:

- Retail
- Accommodation and food service activities (tourism related)
- Education
- Human health and social work activities
- Arts, entertainment and recreation
- Also housing, where it relates to possible office conversions.

9.3 It must be recognised that the job and space requirements associated with these sectors are estimated and planned for in a different way to B class uses. For example, health facilities will have quite specific land needs that are not linked directly to job numbers; education facilities are planned based on forecasts for pupil roll numbers and capacity in existing schools/colleges. Retail or leisure operators will often locate in town centres, within mixed-use schemes or in locations of their choice, rather than on specifically allocated sites.

Retail

9.4 Policy 11: Retail and Town Centre Uses and Business Based Tourism of the Central Lancashire Core Strategy, identifies Central Lancashire retail hierarchy as:

- City Centre: Preston
- Principal Town Centres: Leyland and Chorley
- District Centres: Bamber Bridge, Clayton Green, Longton, Penwortham and Tardy Gate, emerging centres at Buckshaw Village and Cottam.

Retail Demand

9.5 Current retail and leisure studies for Central Lancashire identify the following.

Chorley (Central Lancashire Retail and Leisure Review, 2010)

- 9.6 In terms of convenience retail, the existing out-of-centre Morrison's store in Chorley was found to be overtrading to the extent that there was a need for a new sequentially compliant foodstore in the Town Centre. That requirement has now been met with the completion of the Asda foodstore at the junction of Bolton Street and Pall Mall.
- 9.7 Whilst Chorley Town Centre retained just under half of all comparison expenditure, it secured only 35 percent of clothing and fashion spend. The existing local fashion offer is focused towards the value end of the market. There thus was a quantitative and qualitative need to plan for new comparison retail provision within the town centre, with an extension of the Market Walk Shopping Centre suggested. That expansion to the current 34-unit shopping centre will include Reel Cinema.
- 9.8 Bulky goods needs are met in out of centre locations.

Preston (Central Lancashire Retail and Leisure Review, 2010 and Preston City Centre Retail and Leisure Study, 2013)

- 9.9 Preston City Centre appears to be well maintained and has seen a number of improvements made to the public realm and the main shopping centres, both of which are modern and well occupied and have attracted a number of high street retailers which have not previously been represented in Preston. Preston has improved its retail ranking in recent years, moving from 44th nationally, in 2009, to 29th in 2013. Preston is thus becoming a more competitive centre within the region, and continues to attract retail and leisure requirements. The study also reports a strong requirement for more comparison floorspace in the City Centre, equating to 146,275 sqm by 2027.
- 9.10 There is no equivalent need for convenience floorspace but rather a qualitative need to improve the convenience goods provision within Preston City Centre through increasing the range of operators and improving the independent convenience goods offer. Among other benefits this would address identified overtrading in a range of out of centre foodstores. Elsewhere it is assumed that major housing growth proposed for North West Preston will generate a range of further convenience requirements which will be met locally.
- 9.11 However, most recent investment in retail or leisure floorspace has been at out of centre locations, such as Deepdale Retail Park, and the City Centre lacks modern

floorspace and facilities, specifically department stores and large floorplates as well as family orientated leisure uses.

South Ribble (Central Lancashire Retail and Leisure Review, 2010)

- 9.12 Leyland has a strong convenience offer including Tesco, Morrison's (now Asda) and discount multiples. Of the District Centres, Bamber Bridge is under performing due to its limited food offer (then including Somerfield) in comparison to the large out-of-centre Sainsbury's store at South Rings. There was thus a quantitative and qualitative scope for a new centrally located (sequentially compliant) mainstream foodstore in Bamber Bridge in order to clawback expenditure. It is not clear how much this has now been achieved with the replacement of Somerfield with a mid-sized Morrisons.
- 9.13 Leyland has a limited comparison retail offer and the survey results indicate that it loses a high proportion of its trade to the Capitol Centre (Walton-le-Dale) and Preston City Centre for their main comparison shopping needs (clothing etc.). While the town could benefit from a greater comparison offer, the real prospects of attracting large scale national multiple investment to this secondary retail centre are modest. Bamber Bridge serves localised day-to-day comparison shopping needs and there is no requirement to proactively plan for new provision
- 9.14 In terms of growth forecast in this sector to 2034, by Oxford Economics:
- Chorley – 500 extra jobs locally from the 2014 total of 6,800
 - Preston – 300 extra jobs locally from the 2014 total of 15,500
 - South Ribble – 1,100 extra jobs locally from the 2014 total of 8,600.

Retail in Employment Areas

- 9.15 Larger retail and leisure uses do overlap with B-Class employment in a range of Central Lancashire Employment Areas, including around Buckshaw Village, Chorley; South Rings, Cuerden (where a new Gym has been developed) and many of the inner urban employment areas of Preston. Five larger format retail units, plus the Ikea store will form part of the mixed-use proposals at the Cuerden Strategic Site. In the local land supply, the following can be noted:
- EP1.2: Botany Bay, Chorley – The current planning application proposes the whole EP1.2 site for a retail park, with any B-Class uses limited to B1(a) offices in the existing Mill building

- EP1.7: Land at Ackhurst Business Park, Chorley – Current proposal is for a Nissan motor sales garage
- EP1.13: Southern Commercial, Buckshaw Village, Chorley – Frontage land developed for two pub-restaurants and Aldi foodstore (with another drive-thru restaurant proposed)
- EP1.3: Preston East Employment Area, Preston – Development here includes roadside services
- EP1.7: Land North of Eastway (formerly Broughton Business Park), Preston – Proposals include a 0.7 ha mixed use centre including local shops, services, food and drink
- Royal Ordinance Matrix Park, Buckshaw Village, South Ribble – Remaining land now developed for roadside services and coffee shop.

9.16 The impact of these on the local employment land supply is considered further in Section 10.0.

Accommodation and Food Service Activities

9.17 The sector covers employment generated by hotel, bed and breakfast self-catering accommodation, as well as bars and restaurants. Low growth is forecast in this sector to 2034:

- Chorley – 700 extra jobs locally from the 2014 total of 3,200
- Preston – 300 extra jobs locally from the 2014 total of 4,400
- South Ribble – 700 extra jobs locally from the 2014 total of 2,600.

9.18 Demand for this sector is generated from both domestic, and to a lesser extent overseas tourism (hotels and restaurants), as well as spend by the sub regions residents (most likely to be restaurants and other catering). The nature of Central Lancashire also means that a reasonable portion of hotel demand will come from business travellers. Business hospitality will also support local restaurants, pubs and cafes.

9.19 Key trends in the evening economy, identified in current retail and leisure studies, are:

- *Chorley* – Chorley has a relatively small evening economy offer which is focused on traditional independent pubs and restaurants, predominantly focused along Market Street. Overall, the Borough retains over half of its evening economy spending, particularly for traditional drinking. Chorley Town

Centre could benefit from more family orientated facilities, which are mostly found in out of town locations

- *Preston* – The evening economy offer in Preston City Centre is primarily concentrated around the Church Street, Avenham Street and Cannon Street areas and two thirds to three quarters of the Borough's trade is retained locally. There is a qualitative need to improve the offer of Preston City Centre. The City Centre does not benefit from a cinema, and has a limited range of bar and restaurant uses which together drive footfall and provide a night time economy. There are, however, a number of reported requirements for space from leisure and restaurant / bar operators. There is an opportunity to secure these operators in Preston through the delivery of appropriate space in the City Centre
- *South Ribble* – The evening economy in Leyland comprises a mix of traditional pubs and high street restaurants. The main provision is predominantly located in the secondary areas of the town centre around Chapel Brow and Golden Hill Lane, recently augmented by a new Wetherspoons on Hough Lane. Station Road, Bamber Bridge also has a relatively strong food offer. The Central Lancashire Retail and Leisure Review (2010) reported that while levels of eating out in South Ribble are high around 57 percent of restaurant trade is lost to Preston.

9.20 A growing resident population is likely to boost the local demand for hot food, but it is difficult to quantify the amounts.

9.21 In terms of hotel provision, further local growth is expected to focus on accommodating businesses travellers. There is already a reasonable provision of mid-budget hotels around the core industrial/business areas of North East Preston, Bamber Bridge and Walton Summit, but further growth is likely. For example, Travelodge is seeking three further hotels in Central Lancashire, with Bamber Bridge, Leyland and Preston all identified as specific target locations, in addition to its existing Preston City Centre and Clayton-le-Woods, Chorley hotels. There are also three hotel proposals within Preston City Centre Regeneration Plans, including the restoration of The Former Post Office Building for a 60-bedroom hotel and spa by Signature Living; a 105- room aparthotel (plus casino, spa and gym) in the Guild Hall improvement scheme and return of the Park Hotel, East Cliff to C1 use.

- 9.22 All three Central Lancashire authorities link to the rural economy tourism/visitor markets of the County, with offers of rural food, hotel and holiday let accommodation. The market view is that there is only modest growth potential in this area.

Education

- 9.23 This sector incorporates primary and secondary schools, further education colleges, universities as well as commercial nurseries. Oxford Economics identifies this as a largely static, or declining sector:

- Chorley – 100 extra jobs locally from the 2014 total of 4,000
- Preston – 500 jobs less from the 2014 total of 6,300
- South Ribble – 100 jobs less from the 2014 total of 3,900.

- 9.24 One to one discussions have been completed with the University of Central Lancashire (UCLan) and the two further education colleges of Central Lancashire. Of the three, only UCLan has significant ongoing growth aspirations. Physical growth will be contained within the existing campus area and limited to student teaching/support facilities, although a growing local student population will clearly generate linked requirements for housing, retail and leisure facilities. An improved skills offer in Central Lancashire will also have a positive impact on business growth although this cannot be translated into a quantitative employment land need.

University of Central Lancashire

- 9.25 With a student population of almost 38,000 UCLan in Preston is the largest University in Lancashire and the third largest in the North West. As of 2013/14 UCLan employed 3,290 staff and supported 4,300 FTE jobs across the region, contributing £200 million to the North West economy, including £15 million in supplier contracts. It offers a portfolio of over 350 undergraduate courses and nearly 250 postgraduate courses, with identified specialisms in business, health, humanities and science. The Preston Campus covers 15 ha north of the City Centre and presently comprises some 138,000 sqm in 63 buildings.
- 9.26 In recent years UCLan has invested over £100 million in infrastructure and technology support projects. Of relevance to this study is the £15 million Media Factory, Maudland Road which provides facilities for digital media and performing arts, alongside a business incubator. The incubator provides both office and flexible workspace, with accommodation made available to former students only who have,

or are looking to found their own businesses in a range of digital, service and creative sectors.

- 9.27 In 2015 UCLan developed a Masterplan Framework for the delivery of a further £200 million in investment, in Preston, to 2025. The Masterplan, if delivered in full would provide 36,462 sqm (gross) of additional floorspace, in 14 buildings/extensions ranging from 20 to 8,390 sqm. Most would be delivered as infill development, but a major local highways alteration is also proposed with the redevelopment of the Moor Lane/Walker Street/Friargate/Corporation Street Interchange and the delivery of a new campus square, parking and 7,560 sqm of additional premises as a student Support Centre.
- 9.28 Most Masterplan projects remain aspirational at this time although the University is delivering two areas of student study and break out space, off Marsh Lane and Victoria Street, in summer 2017 at a cost of £8.15 million.
- 9.29 Also, intended to commence in summer 2017 is the 8,390 sqm Engineering Innovation Centre (EIC), Corporation Street. Part funded by the LEP to support key skills development, relevant EIC objective are:
- *“An expanded engineering school with the capacity to accommodate increased undergraduate students*
 - *An increase in applied, industry relevant research linked to key Lancashire manufacturing sub-sectors and specialisms, directly supporting the engineering business base in Lancashire and the North West*
 - *A long term programme of SME and supply chain engagement, innovation and business development support, with companies able to access state of the art equipment and testing facilities*
 - *An increase in the number of graduate engineers each year in Lancashire, providing Lancashire employers with a source of locally trained new graduates*
 - *An increase in the number of young people and, in particular the proportion of females, choosing to take up engineering at a local university.*
 - *GVA and employment generation as a result of the Engineering Innovation Centre’s activities.”*
- 9.30 UCLan’s include highways and public realm investment along the main routes south to the City Centre – Corporation Street and Friargate. The University has submitted a Growth Deal bid to support this. It is working with the City Council to link to broader

regeneration plans and private sector investment, which is expected to include a conversion of the 'Old Tram Shed' building to student residential.

- 9.31 UCLan is also working with the Central Lancashire local authorities and Preston Collage to deliver a 'Construction Skills Hub' for construction sector skills and training. It has the goal of boosting construction industry skills, working with employers and endeavouring to ensure that a higher proportion of Central Lancashire's construction activities are met by local labour and local businesses. 2013/14 data indicated that graduates for that year were expected to contribute an annual average of £24 million to the North West and £15 million to the Lancashire economy over their working lives.

Student Accommodation

- 9.32 UCLan no longer delivers student accommodation directly, and has no role in private sector development schemes. Yet its growth is clearly driving growth in student living in inner Preston. Large blocks of student flats have been delivered on Walker Street, Moor Lane and at Ringway, with further developments/conversions planned on Friargate and Fylde Road.

Preston College

- 9.33 Preston College has invested some £25 million in new facilities over the last 5 years, and has no further large scale growth plans. In 2015, these included a £13 million science, technology, engineering and maths (STEM) development, for skills development and local business training.
- 9.34 The College is currently part of a County-wide review of further education facilities which may impact on its operations, possibly including a merger with other Colleges in the Central Lancashire/Fylde Coast area. It currently has 12,000-15,000 students.
- 9.35 Preston College reports no concerns with transport and access. In the past the College had 26 buses attending the site at peak times, but an agreement with Stagecoach means that this has been rationalised to a regular daytime service every 20 minutes.

Runshaw College

- 9.36 Runshaw College is a further and higher education college based at three centres in Leyland and Chorley. The College has some 10,000 students (and 700 staff), of

which 80 percent are based at the main campus at Langdale Road, Leyland. All of these 16-18 year olds on further education courses.

- 9.37 Runshaw College has a further 2,000 students at its Euxton Lane Campus, on the edge of Buckshaw Village, Chorley, including 200-300 apprentices.

Langdale Road Campus

- 9.38 Runshaw College's Langdale Road Campus presently comprises some 26,000 sqm of developed premises on 7.5 ha. There has been almost continuous redevelopment and expansion within the Langdale Road campus over the last 20 years. The most recent completions include the delivery of a 750 sqm redevelopment of the former Borrowdale Block to create a BREAM Excellent teaching facility referred to as Patterdale. The Hawkshead Annex has also been developed, a further 750 sqm of space, as have two Dalehead buildings.

- 9.39 Future growth at Langdale Road will remain within the current 7.5 ha site. Expansion outside of this area is prevented by surrounding woodland, steep valleys, adjacent housing and the M6 Motorway. The only possible expansion option may be onto a small area of land, owned by LCC, adjacent to the M6. If that land could be brought under College control, it would likely be developed for car parking.

- 9.40 Further development, within the defined Langdale Road site, is expected to include a new theatre, hair and beauty centre and restaurant facilities, developed in the footprint of the current Tindale Building. However, this will cost some £10 million to deliver, funds the College does not have.

Euxton Lane Campus

- 9.41 Over 2015-2016, Runshaw College invested £6.2 million (part funded by Lancashire LEP) in a new, 2,056 sqm Science and Engineering Innovation Centre (SEIC) which is aimed at providing vocational training at apprenticeship, HNC, ONC and higher levels. The facility has seen good interest from students but lacks business partners in the manufacturing and engineering sectors. Several other large employers have set training standards which are difficult for the College to meet.

- 9.42 Further investment at Euxton Lane is unlikely. Overall, Runshaw College is moving away from adult and specialist vocational training, reducing staffing in this area. This

is partly due to cuts of up to 40 percent in the funding available to support training providers.

Market Street, Chorley

- 9.43 Runshaw College no longer operates from this facility and is looking to withdraw from the lease it has with owners Eric Wright. The reason for this is financial, the property was originally developed as a PFI Scheme and was let to the College at around three times the market rate to support this, a level of rent the College can no longer afford.

Business Courses

- 9.44 Runshaw College has a strong relationship with local businesses. This is facilitated through the Runshaw Business Centre which includes a sales team dedicated to marketing joint research, education and apprenticeship opportunities to companies. The College also provides health and safety training courses to businesses.
- 9.45 The College does not provide any incubation or start-up space for new business development. There are no plans to provide any such facilities in the future, particularly as there is insufficient surplus space at Langdale Road (or in Chorley) for this use. The College does however rent out meeting rooms, conference and sports facilities for corporate and community events.

Transport

- 9.46 Runshaw College leases 3,500 seats on 45 coaches on a daily basis. However, it would wish to see greater public transport provision along Langdale Road, serving a greater range of destinations. At present only two bus routes pass along Langdale Road. It also feels that nearby Runshaw Hall Lane could be made safer for cyclists and pedestrians.

Other Issues

- 9.47 A key issue for Central Lancashire Colleges is the current downturn in the population of 16-18 year olds at present, reducing the number of students seeking further education courses. This comes at a time when further education colleges across Lancashire and Greater Manchester are expanding their geographic areas of coverage into Central Lancashire and increasing competition for the reduced body of potential students.

9.48 The demographic downturn is expected to continue until 2020. Runshaw College will benefit from the large growth in households proposed through City Deal, but as much of the initial take up of housing will likely be for young families, it will be some years before the children within those households reach school leaving age.

Human Health and Social Work Activities

9.49 Included within this sector are hospitals, medical centres, GP and dental surgeries, private or specialist healthcare (e.g. physiotherapy), veterinary practices and residential care homes. Oxford Economics forecast the following jobs growth to 2034, under baseline conditions:

- Chorley – 2,100 extra jobs locally from the 2014 total of 8,100
- Preston – 500 extra jobs locally from the 2014 total of 15,800
- South Ribble – 400 extra jobs locally from the 2016 total of 6,000.

9.50 Of the three local authorities, only Chorley is expected to see significant further health sector growth. The scale of difference is surprising and questionable, although even if the numbers for Chorley prove exaggerated it still offers good prospects for the Strawberry Fields Digital Health Park proposed on Euxton Lane.

9.51 The latest '*Capital Development and Estates Strategy (2016)*' commissioned by the Chorley and South Ribble and Greater Preston Clinical Commissioning Groups indicates that no further large scale expansion is proposed at either Chorley or Preston Hospitals. However, the population growth potential of City Deal is known and understood by the respective Clinical Commissioning Groups.

9.52 At present, there are some 64 GP practices across Central Lancashire, 31 in Chorley/South Ribble and 32 in Preston. Over three quarters of these aspire to refurbish, expand or relocate, due to property and operational constraints. Specific identified projects are listed by Local Authority Area, below. For the most part these comprise refurbishments, expansions or consolidations of existing health facilities, the latter freeing up buildings for other uses, including B1(a) offices. Where new build clinics are proposed, these will be focused in housing rather than employment growth areas, particularly North West Preston. Thus, no impact on Central Lancashire's supply of employment land and premises is likely.

Capital Development and Estates Strategy Projects – Chorley

9.53 Growth in the order of 1,150 new dwellings (growth estimate at time of study)

equates to a need for some 8 additional GPs, primarily in the north of the Borough, Buckshaw Village and Chorley town. Health projects to meet this additional need could include:

- Collaborative solution or separate solutions for the Clayton le Woods practices
- A new development for Whittle Surgery;
- Opportunity to improve utilisation /increase space in occupation at Buckshaw Village
- Opportunity to increase space in occupation at Euxton Medical Centre, if required
- The redevelopment of Chorley Health Centre
- The delivery of the Friday Street project, Chorley (which will be dependent on identifying whether GP practices still have a relocation requirement as due to the delays in delivery they are identifying alternative arrangements; and may override the need for other potential projects in this list)
- The upgrade of Dr Bamford & Partners (Gillibrand Street, Chorley)
- The upgrade of Eaves Lane Surgery, Chorley
- The upgrade of Regent House Surgery, Chorley
- The upgrade of Library House Surgery, Chorley
- The upgrade of Coppull Medical Practice; and
- A solution for Adlington Medical Centre
- Upgrade of Withnell Health Centre
- Croston surgeries – upgrade of the individual properties or a newbuild.

Capital Development and Estates Strategy Projects – Preston

9.54 Growth plans in North West Preston would see some 3,206 new homes delivered here by 2026 (growth estimate at time of study), over 6,000 in the long term. This growth would generate some 16,185 additional patients and require the provision of some 12 additional GPs. A further 1,500 new homes are proposed for the City Centre along with UCLAN related student housing. A further 1,950 homes are likely in Preston East and Longridge, requiring two additional GPs. Health projects to meet this additional need could include:

- A new build health centre in the heart of the new housing development in North West Preston
- The extension/redevelopment of Ingol Health Centre
- The upgrade/expansion of Briarwood Medical Centre

- A review of operations in the Robb & Robb, Moor Park and Lytham Road surgeries
- The redevelopment of Flintoff Way Clinic
- The relocation of Doclands Clinic
- Ensuring UCLAN can deliver the required capacity for additional students
- The extension of Fishergate Hill Surgery
- A potential collaborative project/number of projects in the Avenham and Frenchwood and New Hall Lane areas for Avenham Lane Practice, Frenchwood Surgery, Park View Surgery, The New Hall Lane Practice and Geoffrey Street Surgery, plus potentially the branch surgery of Park Medical Practice
- Upgrade to Stonebridge and Berry Lane Surgeries; and exploration of potential option for a single hub (maybe utilising Longridge Community Hospital).

Capital Development and Estates Strategy Projects – South Ribble

9.55 Some 6,500 new dwellings are planned/allocated in South Ribble (growth estimate at time of study), requiring 4.8 additional GPs. Health projects to meet this additional need could include:

- A single co-located hub building for all practices in Leyland. If this is not deliverable, then each individual surgery in the area will require some form of upgrade or expansion. Moss Side and Central Park PCIF projects and the Leyland Surgery and Worden Medical Centre ETTF projects could be pursued
- New build premises for the Lostock Hall practices, with an extension to Lostock Hall Medical Centre in the interim
- Upgrade to Kingsfold Medical Centre, or possible involvement in Lostock Hall newbuild
- Upgrade to Penwortham Health Centre
- Upgrade to St Fillan's Medical Centre
- Upgrade to The Ryan Medical Centre
- A solution for Roslea Surgery, possibly co-location with The Ryan Medical Centre on a new site in the longer term
- Upgrade to Riverside Medical Centre
- Possible extension to New Longton Surgery
- Upgrade to Longton Health Centre.

Arts, Entertainment and Leisure

- 9.56 This sector includes, amongst other activities, forms of commercial leisure such as cinemas, theatres, bowling alleys, bingo halls and nightclubs. In Central Lancashire such uses are focused at Preston City Centre; Preston Docks (presently home to Central Lancashire's only multiplex cinema); the Capitol Centre, Walton-Le-Dale; Chorley and Leyland Town Centres. Further growth is expected in Preston City Centre with a new cinema proposed as part of the Markets redevelopment programme, created where the indoor market currently stands. Also, the Market Walk Extension in Chorley Town Centre, which now has Reel Cinema's secured as an occupier. Leisure development in Preston City Centre will include some redevelopment of older surplus office space, including former City Council offices at the Market, but will not have a significant impact on the employment land and premises offer of the City.
- 9.57 The growth in health awareness has seen an increase in demand for private health clubs and gyms and these are uses that will look to locate on business parks, industrial estates or retail parks either through new build or conversion of existing industrial space. Such facilities can range in size from 500 sqm to 2,000 sqm, which could translate to up to 1.5 ha of land with car parking. Such uses are evident in many of Central Lancashire's Employment Areas, although overall needs are still primarily met at a range of large purpose built facilities, including the Virgin Active facility at the Capitol Centre; Places Gym, Cuerden; David Lloyd Chorley; the public leisure centres at West View and Fulwood, Preston and the Real Gym in Preston (with further City Centre gym provision expected to form part of the Guild Hall scheme).
- 9.58 Oxford Economics forecast modest growth in this sector for each authority:
- Chorley – 300 extra jobs to 2034, from a 2014 base of 1,100
 - Preston – 200 extra jobs to 2030, from a 2016 base of 2,000
 - South Ribble – 300 extra jobs to 2030, from a 2014 base of 1,000.
- 9.59 This combined with general policy priorities to focus leisure development in the town and city centres does not suggest that the future expansion of this sector will have a major impact on Central Lancashire's supply of employment land and property.

Town/City Centre Regeneration and City Living

- 9.60 A range of ambitious regeneration programmes are proposed in, and around, Chorley

and Preston Centres. In Chorley, these will not generally affect the existing B-Class employment stock. The exception to this is the redevelopment of a Council-owned block facing the Town Hall. The block, Oak House, currently comprises ground floor retail/leisure and an upper floor office scheme of some 600 sqm. The offices, which were formally let by Northern Trust as a multi-occupancy scheme, are judged no longer to meet modern business requirements. Current proposals would see the building demolished to make way for a civic square.

- 9.61 In Preston, the Market Place scheme would see the 2,541 sqm Lancastrina House Building, former City Council offices, refurbished as part of the City's new multi-plex cinema project. The Park Hotel building, East Cliff was previously an LCC office and, as noted above, is expected to return to hotel use.
- 9.62 Office to residential conversions are primarily an issue in Preston City Centre where some 4,800 sqm has been converted since 2008. Further buildings, totalling 12,175 sqm are also proposed for residential conversion. The latter includes three former LCC buildings of 2,000-4,748 sqm. Stakeholders contacted for this study indicate that the former LCC buildings included are older, 1960s-1980s premises, of a scale, configuration and fit out which would not meet modern occupier requirements. The scale of refurbishment required to make them suitable office properties is unlikely to be financially viable, thus their loss is not judged to be an issue for the wider office economy of Preston. Losses, existing and proposed, recorded to date, represent 15.9 percent of the total City Centre B1(a) office stock, as identified in 2008, of 127,622 sqm.
- 9.63 Preston City Council has the desire to increase city living in the City Centre and has published a Prospectus in support of this. Areas of focus for this are:
- Winckley Square – Opportunity for conversion of historic premises, with existing conversion prospects for several buildings
 - Station Gateway – Schemes here expected to be retail and commercial focused, serving an expanding Station, but with further options for residential. There are two large employment uses in this area, LCC main offices (County Hall) and the Royal Mail Preston Delivery Office which could be impacted by proposals
 - Corporation Street – Sitting south of UCLan there are existing plans for student residential here. Although the area includes some historic office/industrial premises, little remains in B1(a)/B1(c) employment use

- Harris Quarter – Opportunities for mixed leisure, retail and residential reuse/redevelopment in this historic area. The north of this quarter includes Preston’s largest multi-storey office buildings, associated with the Preston Office Centre
- Stoneygate – Envisioned for an urban village development that would require the removal of some backland office, industrial and warehouse premises although, in practice, most properties in this area are in retail, leisure or trade uses. Masterplanning is also expected to include some new B-Class employment options
- Horrocks Quarter – Opportunities for housing and apartment development, with the focus being on vacant sites and the Queen Street Retail Park. Cotton Court Business Centre is the only significant B-Class property in the area.

9.64 Over the long term, prospects to increase the City Centre residential population from its present level of around 8,000 could deliver a sizable new housing offer. Growth in the local student population is particularly likely, with accommodation plans associated with UCLan already being progressed.

9.65 Impacts on the local office stock will likely be focused in Winckley Square and the Harris Quarter and stakeholders feel there is sufficient surplus and low value stock at both locations to support further losses without impacting on the overall office market. Further, it was the view of many consulted that the local office buildings which can be viably and easily converted to housing have already been identified for such changes. Further large scale conversions may be practically challenging, given the nature of the stock, and would be dependent on a large scale increase in demand for city living, something which has, to date, only had a modest role in Preston’s housing market.

9.66 Finally plans at the Station Quarter and Stoneygate may also deliver additional office stock although the quantum of possible provision still needs to be defined.

Summary

9.67 Jobs growth from non B-Class uses is forecast to focus in the retail, accommodation and food service activities (for Chorley and South Ribble) and arts, entertainment and leisure. Chorley is forecast to see particular gain in health sector jobs which may benefit the Digital Health Park project there.

- 9.68 In terms of retail, all three areas need to strengthen their comparison, and in some cases convenience offers as well as building up the evening economy. Both Chorley and Preston have regeneration plans which will enhance the leisure and, in the case of Chorley, comparison retail elements, crucially delivering two new cinemas for Central Lancashire, hot food and, in the case of Preston several new City Centre hotels.
- 9.69 Retail, leisure and roadside services have been delivered, or are proposed, on several of Central Lancashire's employment sites. The impact of these on the local land supply is accounted for in Section 10.0.
- 9.70 A decrease in employment in the education sector is forecast for Preston and only modest growth forecast for South Ribble. In the case of Preston this does not account for the growth plans of UCLan although neither of the two Central Lancashire further education colleges expect to expand significantly in the foreseeable future. Clearly a growing population and major residential schemes, including those linked to City Deal, will require more investment in local schools and this should offset some of the possible losses.
- 9.71 As noted, Chorley is forecast to have exceptional health sector growth to 2034, compared to South Ribble and particularly Preston. The scale of difference is surprising and questionable. Growing populations in all three local authorities will generate additional health service requirements, but apart from a large new facility in North West Preston the need will be met through the consolidation and upgrading of existing facilities. No current proposals impact on the supply of employment land.
- 9.72 In terms of arts, entertainment and leisure, growth of 900 jobs, spread evenly across all three authorities is forecast to 2034. The main impact on the employment land supply from this sector is likely to be the reuse of premises for private health clubs and gyms.
- 9.73 Current town and city centre regeneration programmes for both Chorley and Preston only have a modest impact on the local supply of employment premises. A more significant issue is the loss of Preston City Centre office accommodation to residential conversion. If current proposals are enacted in full then the City Centre will lose around 15 percent of its stock although the bulk of the losses will be former LCC facilities which never held private sector occupiers and are felt to be ill suited to

meeting modern business needs. Further growth in city living is an aspiration of the City Council and is expected to be an ongoing feature of Preston's regeneration programmes. This will involve the loss of office and industrial stock although for the most part only in Winckley Square and (possibly) the Harris Quarter, although likely quantum of loss may prove to be modest. This reflects the fact that many buildings readily suited for conversion have already been proposed for such a change. It also reflects a degree of scepticism amongst stakeholders about the real scale of the city centre residential market which can be delivered in Preston.

- 9.74 Overall, stakeholders argued that the City Centre has sufficient surplus/under used stock to support an element of conversion without damaging the competitiveness of Preston and without requiring further land allocations to compensate.

10.0 EMPLOYMENT LAND AND PREMISES SUPPLY

Introduction

- 10.1 Having looked at demand in the previous sections, this section looks at the existing portfolio of potential employment land in the study area to meet that demand, not only how much there is, but also its quality, type, suitability and availability. Central Lancashire needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices.

Land Supply

- 10.2 Each Council has provided details on its local land supply as of 31st March 2016. The Strategic land supply, comprising the Cuerden Strategic Site and Samlesbury Enterprise Zone, is considered separately below. The Baseline Local Supply for each local authority area, comprises:

Chorley

- 10.3 Chorley's Employment Land Supply comprises the 15 allocations under Policy EP1 – 'Employment Site Allocations' of the Adopted Chorley Local Plan 2012 – 2026: Site Allocations and Development Management Policies Development Plan Document (2015). These total 78.20 ha.
- 10.4 Chorley Council also provided a list of unimplemented planning consents for B-Class use. Six relevant sites provide a further supply of 7.65 ha.
- 10.5 The total Chorley Baseline Supply is thus 85.85 ha.

Preston

- 10.6 Preston's Employment Land Supply comprises the 11 allocations under Policy EP1 – 'Employment Site Allocations' of the Adopted Preston Local Plan 2012-26: Site Allocations and Development Management Policies Document (2015). These total 99.52 ha.

South Ribble

- 10.7 The South Ribble Baseline Employment Land Supply includes the four sites defined

under Policy E1 – ‘Allocation of Employment Land’ in the Adopted Local Plan (2015). These total 35.44 ha. Building on the research of the 2015 South Ribble Employment Land and Property Study, three further employment sites are included with delivery potential to 2034:

- South Rings, Cuerden (12.55 ha) – Employment Area with further available development land
- C2: Moss Side Test Track, Leyland (Doll Lane) (6.08 ha based on Development Brief) – Mixed-Use Site with employment potential
- C1: Pickering’s Farm, Bee Lane, Penwortham (0.45 ha according to most recent HCA estimate) – HCA housing site with modest additional employment potential.

10.8 The total South Ribble Baseline Supply is thus 54.52 ha. The total Central Lancashire Baseline Supply is 239.89 ha.

10.9 However, consideration of this supply suggests that these totals include areas of land which will not be brought forward for development, will be developed for non B-Class uses, to meet the needs of specific occupiers only (i.e. expansion space) or where development has now completed. Table 61 outlines the assumptions made about sites included in the three Councils Baseline Supplies, explaining why revised site areas have been used in some cases. The Table also provides comments on status (e.g. owner intentions) and likely use classes of premises which could be delivered on each site.

10.10 Allowing for these revisions gives a revised supply total of **175.29 ha for Central Lancashire (the Realistic Supply), comprising:**

- **Chorley: 52.25 ha**
- **Preston: 70.68 ha**
- **South Ribble: 52.36 ha.**

Table 61 – Employment Sites Schedule

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|---|-------------------------|--------------------------|---|----------------|-------------------------------------|-------------------------|--------------------------|--|----------------|--|-------------------------|--------------------------|--|----------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| EP1.1: Great Knowley, Chorley | 14.10 | 11.73 | Part of a wider EP2 Policy area, which totals 23.7 ha Current site Masterplan shows 100% housing on a net site area of 9.96 ha Site is now the subject of two Outline planning applications for 288 dwellings on two sites, totalling 11.97 ha. While this study does not endorse the specific planning application currently being considered, a largely residential development here does appear the most likely development outcome Some 11.73 ha remains undeveloped in the south of the site and, in principle, available for B-Class development. In practice, viability, topography, adjacent housing and landowner intentions are likely to be significant barrier to any employment development in this area. | B1, B2 | EP1.1: Whittingham Hospital | 1.40 | 2.50 | On the larger site, there has been a reserved matters permission for phase 1 of the development by Taylor Wimpey which is currently under construction for the erection of 132 dwellings and a further 18 apartments. HCA noted that disposal of employment site is approved and initial marketing underway, with some interest. Indicative timetable would see delivery commence in 2019. HCA plans indicate a larger site with a net developable area of 2.5 ha. | B1, B2, B8 | E1(d): North of Lancashire Business Park, Farington | 9.20 | 9.20 | Ownership means that it is likely to be held as expansion land for Leyland Trucks. However, the land is outside of Leyland Trucks' secure site and could be made available to other occupiers. Any development here would be separated from the rest of Lancashire (Enterprises) Business Park, Farington by the Leyland Trucks facility. | B1(a), B2, B8 |
| EP1.2: Botany Bay, Chorley | 5.90 | 0.00 | Part of a wider EP2 Policy area, which totals 8.8 ha Current site Masterplan proposes site for retail, food and a hotel, with no B-Class use. The land is now the subject of an Outline planning application to redevelop the whole 8.8 ha area for a primarily A1/A3 retail park. B1 uses are possible in the refurbished Botany Bay Mill, but no land is specifically retained for this purpose. | - | EP1.2: Red Scar Site H | 2.75 | 2.75 | Land comprising Employment Sites EP1.2 and EP1.4 is now on the market as some 16 design and build plots. These have attracted only modest interest to date. | B2, B8 | E1(e): West Paddock, Leyland | 1.94 | 1.28 | It is anticipated that around a third of the site should be retained for open space The Council has previously considered developing incubation units here, linked to the adjacent Civic Centre. At the time of writing the Council has not identified any funding or development partners to progress this. | B1(a)/B1(c) |
| EP1.3: Land to the North East of M61 junction (Gale Moss) Chorley | 6.90 | 6.90 | Current site Masterplan proposes site for B-Class employment and noted as 'Botany Bay Business Park'. Proposal is for larger industrial uses in three main plots here. The land is now the subject of an Outline planning application for 27, 871 sqm of B2 and B8 accommodation. | B2, B8 | EP1.3: Preston East Employment Area | 13.13 | 8.36 | Large area of land under mixed ownership, seeing incremental take up for a range of proposals. | B1, B2, B8 | E1(f): Land Adjacent to Leyland Business Park, Farington | 2.10 | 2.10 | Over the longer term this represents a significant opportunity to grow and expand this successful local business park. Ainscough Properties have invested extensively in the Business Park in recent years and will continue to do so. In particular there will be a long term need to replace some of the older properties on Leyland Business Park (ex. Leyland Motors, etc. stock), | B1(c), B2, B8 |

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|------------------------------------|----------------------|-----------------------|---|---------------------|-----------------------------------|----------------------|-----------------------|---|-------------|---|----------------------|-----------------------|---|---------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| | | | | | | | | | | | | | which are nearing the end of their economic lives, with modern accommodation which could extend to include new build investment. | |
| EP1.5: Euxton Lane, Chorley | 13.10 | 8.80 | Site consented for high value mixed-use scheme, with developer partners and key funding in place. Short term delivery likely. Non B-Class uses will take up approx. 4.30 ha of the site. | B1(a), B1(b), B1(c) | EP1.4: Red Scar Industrial Estate | 21.31 | 21.31 | Land comprising Employment Sites EP1.2 and EP1.4 is now on the market as some 16 design and build plots. These have attracted only modest interest to date. | B2, B8 | E1(g): Farington Hall Estate, West of Lancashire Business Park, Farington | 22.20 | 22.20 | Bracken House Properties are looking at the redevelopment of the land for a mixture of employment and residential uses. Negotiations have also taken place between the developer and the owners of Lancashire (Enterprises) Business Park, Farington over the access to the employment site from Centurion Way. Lancashire County Council does not support a route running through the site and would wish to see traffic movements controlled. No timetable for bringing this scheme forward. | |
| EP1.6: Cowling Farm, Chorley | 3.50 | 3.50 | Part of larger, mixed-use site. A private developer will deliver the housing; while Chorley Council will make provision for a gypsy site (0.4 ha) and employment uses (3.50 ha). No detailed delivery plans at present. | B1(c), B2, B8 | EP1.5: Millennium City Park | 4.16 | 0.80 | Sizable recent take up/consents, mean that only one small development plot remains readily developable. | B1, B2, B8 | B3: South Rings, Cuerden | 12.55 | 11.05 | Remaining land is split into three main plots south of Craven Drive/Nook Lane: <i>West Plot (5000)</i> – Six B1 and B8 starter units completed and being marketed for occupation. D2 Health and Fitness Club (929 sqm) from Places for People, also now complete and operating as Places Gym. Plans for a 3,000 sqm office at West Plot (5000), South Rings, for the future expansion of Places for People, have now been shelved and are unlikely to proceed. <i>Central Plot (6000)</i> - Split into three plots of 0.26-0.54 ha. All were understood to have been sold to private parties, but no development plans have emerged to date. <i>East Plot (7000)</i> – Now developed for 43 micro business units as Momentum Business Centre). <i>Land north of Craven Drive in South Rings Business Park</i> – Divided into a maximum of | B1(c), B2, B8 |

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|--|----------------------|-----------------------|---|-------------|---|----------------------|-----------------------|--|------------------|---|----------------------|-----------------------|---|-------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| | | | | | | | | | | | | | 24 development plots. Six developed and let at present. Owners now understood to be seeking an industrial development on this site, to comprise small workshop units of around 90 sqm each. | |
| EP1.7: Land at Ackhurst Business Park, Chorley | 0.50 | 0.00 | Owners Chorley Nissan are proposing to develop the site for an enlarged Sui Generis car showroom, retaining its existing site to the east for second hand car sales. | - | EP1.6: Site at Junction 31A M6 West Loop | 2.37 | 0.00 | Under development for car showroom for Hunters Jaguar Landrover. | - | C2: Moss Side Test Track, Leyland (Doll Lane) | 6.08 | 6.08 | <p>Property Capital are the development partner. Over 2016/17, the company submitted a Masterplan for the site, to South Ribble Borough Council.</p> <p>Property Capital have been market testing the employment elements of site. There is understood to be a good level of interest from Central Lancashire/regional industrial and warehouse occupiers.</p> <p>The stated timetable would be for a planning application in spring 2017 and, subject to planning, construction to commence by late 2017/early 2018. However, at the time of writing, there was strong local opposition to the scheme and a decision on the latest Masterplan was deferred at Council Committee, with a general view given that the earlier site Masterplan, still represents the preferred way forward.</p> <p>Property Capital have yet to decide a way forward and what modifications might be made to the Masterplan before it moves to seek planning consent.</p> | B1(c), B2 |
| EP1.8: Lyons Lane Mill, Townley Street Chorley | 0.50 | 0.30 | <p>Site has Planning consent comprising mixed use development consisting of 10 new starter industrial units, 3 refurbished existing units within an enclosed employment site together with 10 residential dwellings.</p> <p>Three refurbished units have been completed on 0.2 ha and have a B2 use class. They are now</p> | B1(c), B2 | EP1.7: Land North of Eastway (formerly Broughton Business Park) | 2.10 | 2.10 | Land consented for mixed use scheme, with main housebuilder in place. Reasonably rapid delivery anticipated. | B1(a), B1(c), B2 | C1: Pickering's Farm, Bee Lane, Penwortham | 0.45 | 0.45 | <p>Broad outlines of development approach agreed, and HCA has an approved disposal strategy to a consortium including Taylor Wimpey as main housebuilder. Disposal is expected in 2018 with major development commencement by 2021 at the latest.</p> <p>Employment element is subject to planning and</p> | B1(a) |

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|---|----------------------|-----------------------|---|----------------------|---|----------------------|-----------------------|---|---------------|-------------------------|----------------------|-----------------------|--|-------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| | | | occupied. | | | | | | | | | | further negotiation, but HCA estimate is for 1,760 sqm of office led property. | |
| EP1.9: Woodlands Centre, Southport Road, Chorley | 0.80 | 0.80 | No known plans for the take up of this land which forms part of the County Council owned Woodlands and Adult Education Centre. | B1(a) | EP1.8: Deepdale Street / Fletcher Road | 0.49 | 0.49 | Land appears to be in use for parking by Gafoor. No identified development plans. Land likely to be for expansion of adjacent occupier but could be developed separately. | B2, B8 | | | | | |
| EP1.10: Stump Lane, Chorley | 0.28 | 0.00 | The site is built out, completing the Chorley Central Business Park. | - | EP1.9: Riversway | 1.37 | 0.35 | Modest development plot remains. No identified plans for take up. | B1(c) | | | | | |
| EP1.11: The Revolution, Buckshaw Avenue, Buckshaw Village | 3.26 | 3.26 | Initially expansion land for adjacent occupier. If not required by Kimberley Clarke would suite a scheme of small to mid-sized good quality B2/B8 units, comparable to those located to the west. | B2, B8 | EP1.10: Preston East Junction 31A M6 | 25.50 | 7.08 | Owner HCA indicate they will be advertising site for freehold disposal to developer for B-Class uses in 2017, with an intention to dispose by 2018. HCA estimate of net developable area is only 7.08 ha however. | B2, B8 | | | | | |
| EP1.12: Group 1, Buckshaw Village | 5.40 | 2.17 | Two plots on the market, of a smaller size than indicated in Local Plan. Land is being actively marketed for freehold disposal. Agents report modest interest, to date, mostly from occupiers/developers looking for B1(c)/B2 options. | B1(c), B2 | EP1.11: Roman Road Farm | 24.94 | 24.94 | In active agricultural use. Owner has no plans to develop but is willing to discuss offers. | B1(c), B2, B8 | | | | | |
| EP1.13: Southern Commercial, Buckshaw Village | 7.76 | 3.16 | In two remaining parcels. Other land taken up by mixed A1, A4 and D1 uses: 0.56 ha to the north of Gibson Lane – Owner now seeking consent for three B1 units of 180 sqm each and a restaurant with drive-thru 2.60 ha from Ordnance Road/Station Approach – Orbit have owned this site for some eight years and have been actively marketing the location. The land has received interest, primarily from local businesses looking to expand. Viability remains a significant barrier to delivery however. | B1(a), B1(c), B2, B8 | | | | | | | | | | |
| EP1.14: Fairport, Market Place | 0.60 | 0.60 | Owner Fairport has no identified plans for further investment at this location. | B1(c)/B2 | | | | | | | | | | |

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|--|----------------------|-----------------------|---|-------------|-------------------------|----------------------|-----------------------|----------|-------------|-------------------------|----------------------|-----------------------|----------|-------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| Adlington | | | | | | | | | | | | | | |
| EP1.15: Land east of Wigan Lane, Clayton-Le-Woods | 15.00 | 8.03 | Chorley Council will support delivery of 8.03 ha of land for employment uses. The remainder of the original allocation will be used for residential uses (with proposals now being progressed) and associated services and facilities including a primary school. | B1, B2, B8 | | | | | | | | | | |
| EP1.17: Rear of New Street, Mawdesley | 0.60 | 0.60 | North is New Street Garage, where owner has previously considered housing. Southern site used as parking/open storage for Goodyear Furniture Centre. | B1(c)/B2/B8 | | | | | | | | | | |
| Plan App.1: Golden Acres, Plocks Farm, Liverpool Road, Bretherton | 4.19 | 0.00 | Proposal is for additional production space for GA Pet Food only. Not available to wider market. Construction underway. | - | | | | | | | | | | |
| Plan App.2: Land adjacent Weir Mill, Crosse Hall Street, Chorley | 0.26 | 0.00 | Erection of an extension to the existing industrial unit with part first floor ancillary office accommodation and the erection of a new detached industrial unit and associated parking. Development for single company only. Not available to wider market. | - | | | | | | | | | | |
| Plan App.3: Daizel Unit C3, Chorley North Industrial Park, Drumhead Road, Chorley | 0.50 | 0.00 | Development completed. Development for single company only. Not available to wider market. | - | | | | | | | | | | |
| Plan App.4: Unit 1, Blainscough Works, Blainscough, Coppull | 0.50 | 0.50 | Extension to existing building to form 3 industrial units with flexible uses. The site is under construction, developed to shell as of May 2017. | B1(c) | | | | | | | | | | |
| Plan App.5: DP Cold Planing, Chapel Lane, Coppull | 0.30 | 0.00 | Erection of extension to existing industrial unit and erection of new industrial unit. Land appears in use as joinery yard for ABC Fencing. No evidence of development as of May | - | | | | | | | | | | |

| CHORLEY | | | | | PRESTON | | | | | SOUTH RIBBLE | | | | |
|---|----------------------|-----------------------|--|-------------|-------------------------|----------------------|-----------------------|----------|-------------|-------------------------|----------------------|-----------------------|----------|-------------|
| Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes | Site Ref.: Site Name | Stated Site Area, ha | Revised Site Area, ha | Comments | Use Classes |
| | | | 2017. Development for single company only. Not available to wider market | | | | | | | | | | | |
| Plan App.6: Twin Lakes Industrial Estate, Brickcroft Lane, Croston | 1.90 | 1.90 | Erection of 27 Industrial Units. The permission has been partially implemented with the erection of 6 industrial units. Some of the site is used for the open storage of equipment hire by a company Readyplant. Other space appears to have been developed to shell, but no evidence of further progression as of May 2017. | B1(c) | | | | | | | | | | |
| Totals | 85.85 | 52.25 | | | Totals | 99.52 | 70.68 | | | Totals | 54.52 | 52.36 | | |

Source: CBC, PCC, SRBC and BE Group, 2017

- 10.11 In the case of Chorley, the largest question is over the three sites of the Great Knowley/Botany Bay area, Junction 8, M61. In principle, 26.90 ha is available, within a wider mixed-use policy area of 32.5 ha. The main developer partner has now submitted applications which would see 11.97 ha of the wider Great Knowley site developed for housing and all the 8.8 ha Botany Bay site developed for a mixed use scheme, primarily comprising an A1/A3 retail park (albeit with some prospects for B1 premises in the refurbished Mill building). Only EP1.3: Land to North East of M61 Junction is proposed for B-Class uses. While this study does not endorse the specific applications being considered, evidence is that landowner aspirations, site assembly and, in the case of EP1.1 Great Knowley at least, access, topography and bridging of the Leeds-Liverpool Canal, are all significant barriers to deliverability. Thus, it is likely that the bulk of the land here cannot be viably delivered for B1, B2, B8 uses. Reductions in the realistic supply are thus made to exclude land where alternative uses are now proposed.
- 10.12 In Buckshaw Village reductions have been made to reflect the land remaining after the development of plots around Buckshaw Avenue/Ordinance Road for retail, pub/restaurant and community uses. Elsewhere EP1.10: Stump Lane, Chorley (0.28 ha) is developed out while EP1.7: Land at Ackhurst Business Park, Chorley (0.50 ha) is now held for development as a Sui Generis car showroom. Discussions also indicate a net developable area of around 8 ha for B-Class uses at EP1.15: Land east of Wigan Lane, Clayton-Le-Woods. Finally, four of the six identified planning consents, totalling 5.25 ha, are for premises to meet the exclusive needs of specific occupiers. The resulting development will not support the wider market of Chorley and central Lancashire.
- 10.13 In Preston, allowances have been made for recent completions. On EP1.10: Preston East Junction 31A M6, the Homes and Communities Agency estimate the net developable area to be 7.08 ha, against the gross allocation of 25.50 ha. EP1.6: Site at Junction 31A M6 West Loop (2.37 ha) is under development for a car showroom uses.
- 10.14 Amendments in South Ribble are relatively modest, primarily reflecting completions over the last two years.
- 10.15 More detail is provided in the proformas for each site (which include plans), which are provided at Appendices 5, 6 and 7. These proformas also consider the

attractiveness of each location to Central Lancashire’s main growth sectors. Identified in several policy documents in Section 2.0, sectors relevant to this study, include:

- Advanced manufacturing
- Aerospace
- Automotive
- Business and Professional Services, i.e. Information and Communications, Administrative and Support, Finance and Professional
- Construction
- Creative and Digital
- Energy (including nuclear, green energy and recycling)
- Health
- Transport and Storage.

Land Use

10.16 In Table 62 below, land is divided between four types of uses – B1(a) Offices, B1(c)/B2 Industry, B2/B8 Larger Industry and Warehousing and a mix of these.

Table 62 – Use Class Assessment (Realistic Supply)

| Area | Use Class | | | | | | | | Total | |
|--------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|
| | B1(a) | | B1(c)/B2 | | B2/B8 | | B1/B2/B8 | | | |
| | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) |
| Chorley | 1 | 0.80 | 6 | 17.20 | 2 | 10.16 | 5 | 24.09 | 14 | 52.25 |
| Preston | - | - | - | - | 4 | 56.08 | 6 | 14.60 | 10 | 70.68 |
| South Ribble | 1 | 0.45 | 4 | 20.51 | 1 | 9.20 | 1 | 22.2 | 7 | 52.36 |
| Total | 2 | 1.25 | 10 | 37.71 | 7 | 75.44 | 12 | 60.89 | 31 | 175.29 |

Source: BE Group, 2017

10.17 Little of the land suits office options only. Only two sites are noted – EP1.9: Woodlands Centre, Southport Road, Chorley and C1: Pickering’s Farm, Bee Lane, Penwortham. The latter reflects the stated intentions of the HCA. Perhaps surprisingly, no sites in Preston specifically suit offices, to the exclusion of all else. This reflects the fact that none of the realistic supply is in the City Centre and the remaining land at Preston Docks is an industrial infill site (EP1.9: Riversway).

10.18 21.5 percent of the Central Lancashire supply is likely to be developed for smaller B1(c)/B2 industry. Again, this is found in Chorley and South Ribble, at locations including Buckshaw Village and the smaller options in Farington.

10.19 43.0 percent of the supply is likely to provide larger B2 General Industry and/or B8 warehousing. This includes larger sites in North East Preston which would suit motorway linked logistics and industry. Finally, just over a third is flexible enough to support the full mix of B-Class options, including B1(a) offices.

Sites Quality

10.20 All sites in the realistic supply have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of a 100, made up of ten individual measures, each scored out of ten. These are: proximity to the strategic highway network, proximity to key local routes, prominence, access to public transport, planning status, access to services, constraints, environmental setting, flexibility and availability. The scoring system and the detailed scores are provided in Appendix 8 and 9.

10.21 Two scores are provided in Tables 63 to 64 a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic and key local highway proximity, prominence environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site.

Table 63 – Employment Sites Scoring (Realistic Supply) – Chorley

| Site Ref. | Name | Revised Size, ha | Score, max 100 | Market -led Sub-total |
|------------|---|------------------|----------------|-----------------------|
| EP1.13 | Southern Commercial, Buckshaw Village | 3.16 | 81 | 42 |
| EP1.11 | The Revolution, Buckshaw Avenue, Buckshaw Village | 3.26 | 77 | 43 |
| EP1.12 | Group 1, Buckshaw Village | 2.17 | 76 | 42 |
| EP1.8 | Lyons Lane Mill, Townley Street Chorley | 0.3 | 74 | 34 |
| EP1.5 | Euxton Lane, Chorley | 8.8 | 73 | 41 |
| Plan App.4 | Unit 1, Blainscough Works, Blainscough, Coppull | 0.5 | 62 | 23 |

| Site Ref. | Name | Revised Size, ha | Score, max 100 | Market -led Sub-total |
|------------|--|------------------|----------------|-----------------------|
| Plan App.6 | Twin Lakes Industrial Estate, Brickcroft Lane, Croston | 1.9 | 60 | 19 |
| EP1.9 | Woodlands Centre, Southport Road, Chorley | 0.8 | 57 | 31 |
| EP1.14 | Fairport, Market Place Adlington | 0.6 | 55 | 27 |
| EP1.3 | Land to the North East of M61 junction (Gale Moss) Chorley | 6.9 | 54 | 42 |
| EP1.6 | Cowling Farm, Chorley | 3.5 | 52 | 36 |
| EP1.1 | Great Knowley, Chorley | 11.73 | 50 | 41 |
| EP1.15 | Land east of Wigan Lane, Clayton-Le-Woods | 8.03 | 41 | 32 |
| EP1.17 | Rear of New Street, Mawdesley | 0.6 | 36 | 13 |

Source: BE Group, 2017

10.22 In Chorley, the remaining sites at Buckshaw Village score well, reflecting their size, flexibility, proximity to the motorway network/local train station and reasonable prospects for at least some further delivery in the short/medium term. EP1.5 Euxton Lane, Chorley also scores well, again reflecting the quality and accessibility of the location, but also the very strong prospects for delivery of the consented scheme, which has both finance and developer partners in place.

10.23 Perhaps surprisingly, EP1.1: Great Knowley, Chorley is the third worst scoring overall. Although the site is well located, close to an M61 junction, accessing and servicing the site appear challenging, land is in multiple ownerships, and is likely to see land lost to housing. The low scoring of EP1.15: Land east of Wigan Lane, Clayton-Le-Woods, reflects the backland position of the land now available for B-Class employment, which sits away from the A49. Overall, EP1.17: Rear of New Street, Mawdesley scores by far the lowest though reflecting its small size, backland nature and position in Chorley Borough's rural west.

Table 64 – Employment Sites Scoring (Realistic Supply) – Preston

| Site Ref. | Name | Revised Size, ha | Score, max 100 | Market -led Sub-total |
|-----------|--|------------------|----------------|-----------------------|
| EP1.3 | Preston East Employment Area | 8.36 | 73 | 41 |
| EP1.4 | Red Scar Industrial Estate | 21.31 | 67 | 37 |
| EP1.2 | Red Scar Site H | 2.75 | 59 | 40 |
| EP1.5 | Millennium City Park | 0.8 | 56 | 37 |
| EP1.10 | Preston East Junction 31A M6 | 7.08 | 50 | 37 |
| EP1.9 | Riversway | 0.35 | 48 | 26 |
| EP1.8 | Deepdale Street / Fletcher Road | 0.49 | 47 | 30 |
| EP1.7 | Land North of Eastway (formerly Broughton Business Park) | 2.1 | 43 | 29 |
| EP1.11 | Roman Road Farm | 24.94 | 35 | 23 |
| EP1.1 | Whittingham Hospital | 2.5 | 26 | 20 |

Source: BE Group, 2017

10.24 The best scoring land in Preston is in North East Preston, where land close to a Motorway junction has seen recent development and owners have plans for how sites can be brought forward, even if real delivery is some years away. Elsewhere, EP1.5 Millennium City Park also appears to be a site with a plan for delivery.

10.25 EP1.1 Whittingham Hospital is the worst scoring site overall. This reflects the site's relative isolation, in the Preston context at least, and the complexity of redeveloping this large hospital complex.

Table 65 – Employment Sites Scoring (Realistic Supply) – South Ribble

| Site Ref. | Name | Revised Size, ha | Score, max 100 | Market -led Sub-total |
|-----------|--|------------------|----------------|-----------------------|
| B3 | South Rings, Cuerden | 11.05 | 84 | 50 |
| E1(f) | Land Adjacent to Leyland Business Park, Farington | 2.1 | 69 | 45 |
| E1(d) | North of Lancashire Business Park, Farington | 9.2 | 65 | 47 |
| C1 | Pickering's Farm, Bee Lane, Penwortham | 0.45 | 56 | 38 |
| E1(g) | Farington Hall Estate, West of Lancashire Business Park, Farington | 22.2 | 54 | 40 |
| E1(e) | West Paddock, Leyland | 1.28 | 34 | 25 |
| C2 | Moss Side Test Trak, Leyland (Doll Lane) | 6.08 | 32 | 28 |

Source: BE Group, 2017

- 10.26 In South Ribble, land at B3: South Rings, Cuerden continues to score best, reflecting its strong position at the heart of the Central Lancashire strategic road network and the delivery which has occurred here since 2015. Land around Leyland and Lancashire Business Parks, Farington also scores well in terms of site size and availability, even if delivery prospects are largely unchanged from the 2015 research.
- 10.27 C2: Moss Side Test Trak, Leyland (Doll Lane) has the weakest score, both overall and in market terms. Although the site has the potential to deliver good quality B-Class space, building on the adjacent offer of Moss Side Industrial Estate, there are some practical barrier to delivery. The site is also more distant from the main strategic road routes than some others, although it scores well on environmental and other local context measures.

Strategic Employment Locations

- 10.28 South Ribble contains two strategic land allocations – the 65 ha Cuerden Strategic Site and the 72 ha Samlesbury Enterprise Zone. These are strategic locations, to be marketed primarily to companies outside of South Ribble and, in the case of the Enterprise Zone, outside of Lancashire. They are also emerging allocations, distinct from the established local supply.
- 10.29 The current status and future potential of these strategic locations is considered here, informed by discussion with LCC, and Lancashire LEP, officers and other parties, undertaken for this study.

Cuerden Strategic Site

- 10.30 Located at the western terminus of the M65, the Cuerden Strategic Site extends include 65 ha of primarily greenfield land, bounded by the A582 to the north, A5083 Stanifield Lane to the west and by the M65/A49 to the east. There is a sand and gravel extraction site to the south.
- 10.31 On 26th September 2017, Lancashire County Council and its development partners Eric Wright Group and Brookhouse Group received planning consent for:
- *“Full - Retail floorspace (Use Classes A1 & A3) and associated car parking, site access, highway works, drainage and strategic landscaping*
 - *Outline - Employment floorspace (Classes B1, B2 & B8), hotel (Class C1), health and fitness and leisure (Class D2), creche/nursery (Class D1), retail*

(Classes A1, A2, A3, A4 & A5), car showrooms (Use Class Sui Generis), residential (Classes C2/C3) and provision of associated car parking, access, public open space, landscaping and drainage and affecting the setting of a Listed Building.”

- 10.32 The agreed site masterplan identifies the following Development Zones at Cuerden:
- A Northern Business Park of 5.725 ha fronting Lostock Lane and providing up to 26,000 sqm of floorspace
 - A Southern Employment Area of 17.64 ha focused on larger manufacturing and storage uses and providing up to 80,000 sqm of floorspace
 - A mixed use area of 4.6 ha that will sit in the heart of the site and have direct M65 access
 - Residential in the north west of the site, 3.69 ha providing up to 210 dwellings
 - An enabling retail development area of 11.214 ha on land in the east of the site (south of the M65 and west of the A49 Wigan Road). Uses here will include up to 70,400 sqm including an Ikea Store as anchor tenant.

10.33 The total area of strategic B-Class land is thus 23.37 ha, with a 16-year delivery timeframe. The two areas would support some 3,000 FTE jobs, of which 1,690 (56 percent) would be in the Northern Business Park (assuming 26,000 sqm of floorspace delivered) and 1,310 (44 percent) would be in the Southern Employment Area. The GVA estimate is £172 million/year, £89 million/year from the North and £83 million from the South.

10.34 Detailed research has been undertaken into market demand, with the following conclusions drawn.

Offices

10.35 The Northern Business Park area is proposed for 13,000-26,000 sqm of B1(a) offices comprising up to two three-storey 3,252 sqm units, four two-storey 1858 sqm units and five two-storey units of 929-1,294 sqm each, delivered to flexible specifications. Alternatively, one plot could be held for a larger 6,503 sqm requirement.

10.36 While the office market of the Preston Conurbation is described as ‘challenging’, the proposed Business Park is, at the lower scale of 13,000 sqm, comparable to past successful schemes such as Riversway, Fulwood Park, Matrix Park, Ackhurst Park

and Sceptre Point. To ensure delivery in a 16-year timeframe, take up of only 813 sqm/year would be needed which would equate to around 6 percent of the Conurbation's average annual B1(a) take up rate of up to 13,935 sqm/year.

- 10.37 The higher development rate of 26,000 sqm is more ambitious, equating to 1625 sqm/year or around 12 percent of annual B1(a) take up rates in the Conurbation. Supporting this level of growth would require the attraction of inward investment to Central Lancashire above rates currently being achieved and also support the growth aspirations of local large companies. This latter point may lead to the loss of some large occupier from Preston City Centre and the Docks. However, achieving the desired level of development would still only require the take up of one full building every three years, which is not considered unrealistic given past experience at Matrix Park and elsewhere. It is assumed that development would be a mixture of design and build and direct land sales to owner occupiers. Speculative schemes are unlikely. Land values of £617,750-£679,525/ha are forecast here.

Industrial/Logistics

- 10.38 The Southern Employment Area is proposed 80,000 sqm of B2/B8 floorspace, likely to meet regional scale logistics needs. This scale of development is considered readily achievable given the ongoing strength of the e-commerce and related logistics sectors in the North West. Indeed, Amazon alone has acquired some 67,000 sqm in recent years in the region, including 16,258 sqm of existing space at Lancashire Business Park, Farington. As was noted in Section 4.0. 2016 saw a record 3.4 million sqm of floorspace taken up nationally, while shortfalls in supply are reported in most regions. In the North West, existing schemes such as Omega, Warrington are reaching capacity, while new sites such as Parkside, St Helens are still some years from providing viable development plots. Cuerden represents a high quality, unconstrained, motorway-linked site which could be brought forward rapidly.
- 10.39 Stakeholders estimate that the site could attract larger footprint occupiers, seeking premises of 37,161-65,032 sqm. While such requirements emerge only infrequently, there is a diminishing number sites in the North West which can accommodate them. Smaller logistics units of 9,290-23,226 sqm could also be accommodated here, while a focus on B8 uses would distinguish the location from Samlesbury.
- 10.40 In terms of the more local market, there is a lack of good quality, modern B2/B8 stock available across Central Lancashire and particularly at nearby Walton Summit, which

is close to capacity. A zone of mid-sized units of 1,858-4,645 sqm is thus proposed in the Southern Employment Area, fronting the larger distribution units to the rear.

10.41 Little of this scale has been developed in Central Lancashire recently, but Revolution Park, Buckshaw Village achieved development rates of 13,000 sqm/year over a 10 year. Other North West schemes, such as Kingsway, Rochdale achieved rates of 16,000 sqm/year. At such rates, development could be achieved within five years, i.e. by 2025 assuming a three-year period beforehand for broader site infrastructure development and servicing. Land values for good quality serviced B2/B8 plots could be in the £741,300-£864,850/ha.

10.42 Formal site phasing, subject to planning, is expected to comprise:

- Phase 1 (2017-2019) – The IKEA-led retail scheme
- Phase 2 (2017-2023) – Mixed use and residential development
- Phase 3 (2019-2025) – Employment development comprising 8.76 ha (40,000 sqm on four plots) on the Southern Site and 2.5 ha (4720 sqm on five plots) of B1(a) offices in the north
- Phase 4 (2022-2025) – Completion of the Southern Employment Area, a further 8.9 ha and 40,000 sqm of development on four plots
- Phase 5 (2026-2034) – Completion of the Northern Business Park, completing 3.23 ha and 6,330 sqm on five plots, with further completion potential possible.

10.43 The scale of the site means that it will ultimately accommodate a wide range of sectoral uses, but the Southern Employment Area is likely to be most attractive to B2 manufacturing and B8 logistics uses which have both large land requirements and a need to directly access the strategic road network, i.e.

- Energy
- Advanced manufacturing
- Aerospace
- Automotive
- Transport and Storage.

8.70 The Northern Business Park would support:

- Information and Communications
- Administrative and Support
- Creative and Digital

- Health
- Finance and Professional.

Samlesbury Enterprise Zone

- 10.44 Discussions here relate to the 72 ha Enterprise Zone only. A separate confidential consultation was undertaken with BAE Systems about operations on the rest of Samlesbury Aerodrome.
- 10.45 In the Government's Autumn 2011 Financial Statement the Chancellor of the Exchequer granted Enterprise Zone status to the BAE Systems Samlesbury and Warton sites. The Enterprise Zone will create 1,200 jobs in the short/medium term and 4,000 to 6,000 jobs in the long term (across both the Samlesbury and Warton sites). The Samlesbury Enterprise Zone covers 72 ha (gross) of which approximately 52 ha (72 percent) is in South Ribble and 20 ha is in Ribble Valley. It aims to attract inward investment opportunities, into Lancashire, in the advanced engineering and manufacturing sector. It will not displace existing companies that are already located in Lancashire.
- 10.46 The Lancashire LEP will manage and co-ordinate activities in the Enterprise Zone through an Enterprise Zone Governing Body. In association with BAE Systems as the landowner, it will assess each proposed development to ensure that the displacement of existing Lancashire companies does not occur and that any development is genuine growth. Activity will focus on international inward investment.
- 10.47 The '*Lancashire Advanced Engineering and Manufacturing Enterprise Zone (Samlesbury) Local Development Order (LDO)*' authorises the development of Class B uses in the Enterprise Zone, where that development will provide accommodation to advanced engineering and manufacturing businesses in the following sectors:
- Advanced flexible materials
 - Aerospace
 - Computing, systems engineering and autonomous systems
 - General Aviation Services
 - High-end automotive including motorsport, electric/alternative energy vehicles
 - Nuclear
 - Renewable Energy.

- 10.48 Delivery of a (D1 use class) Regional Skills Academy at Samlesbury is also authorised by the LDO. The LDO runs to 2023.
- 10.49 Development for occupiers falling within the above industry sectors is automatically within the scope of the LDO and will not require full planning permission to bring forward (although other statutory requirements, including assessments of highways and ecological impacts will still be needed). Development outside the scope of the LDO will require the submission of a standard planning application. However, proposals to provide space for advanced engineering or manufacturing businesses which fall outside of the above sectors, or for complementary uses, would (subject to the approval of the Local Planning Authority and LEP) potentially also be acceptable.
- 10.50 The Samlesbury Enterprise Zone has been in operation for five years now. The net developable area of 48.56 ha is identified. Some 35 ha of this falls within South Ribble. Access is in place from the A59 and other junction work has been completed.
- 10.51 Marketing, led by agents and overseen by the Enterprise Zone Management Board is underway, with plots available which could support units of 250 to 35,000 sqm. The results of this remain confidential at this time, but it is understood that interest has been established from a range of organisations although securing commitments from businesses in compatible sectors is proving challenging.
- 10.52 At present two developments have completed within the Enterprise Zone. These are BAE's 7,400 sqm Academy for Skills and Knowledge (ASK), an apprentice and training facility and the Wincanton Defence Logistics Centre, which is purpose built to support BAE Systems production and through life support programmes. The Facility currently handle's raw materials, aircraft components, tooling, roughing's and forgings for the F35, Hawk and Typhoon aircraft. It has a 13,000 sqm footprint and employs 170.

Employment Areas Assessments

- 10.53 BE Group has reviewed a total of 111 Employment Areas across Central Lancashire, which comprise 920.44 ha of land in primarily B-Class employment use:
- Chorley – 36 Areas comprising 162.38 ha of active land
 - Preston – 55 Areas comprising 413.46 ha of active land
 - South Ribble – 20 Areas comprising 344.60 ha of active land.

10.54 The individual analyses are provided in Appendix 10.

10.55 The identified Employment Areas comprise the main industrial estates and business parks of each Borough, as identified in the respective Local Plans and associated Development Plan Documents.

10.56 Each area has been appraised and assessed through a combination of site visits, local intelligence, consultations with some owners and the views of those involved in the local property market. The analysis includes the following:

- The 'Area' contains the local authority's designated title for the area/site and the 'Settlement' or sub-area in which it is located
- A brief 'Description' in the form of the consultancy team's comment on the area, including the main use classes
- The size in hectares is also provided
- Vacant land is identified, as is the scope for remodelling of properties or sites. Expansion possibilities are also included. These are identified, for simplicity, as 'Opportunities for redevelopment/expansion'. However, in most cases, where an Employment Area is functioning well and most land/property is in use, there may be no such opportunities
- The 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. These are described in Table 66
- Finally, recommendations/actions for the future role of the area are set out.

Table 66 – Grades A to E Definitions

| Grade | Definition | Action |
|-------|--|--|
| A | High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area | Protect strongly in the Local Plan Support and expand |
| B | Good employment sites due to their scale, location and setting. Capable of competing for investment in the Central Lancashire market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors. | Protect strongly in the Local Plan Support and expand |
| B/C | Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses. | Protect in the Local Plan Support |
| C | | |
| C/D | Lower quality locations in residential areas suffering from | Continue to |

| Grade | Definition | Action |
|-------|---|---------------------------------------|
| D | poor accessibility and massing. | protect/review through the Local Plan |
| D/E | Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses. | Promote alternative uses if possible |
| E | | |

Source: BE Group 2017

Property Supply

10.57 A schedule of the vacant floorspace being marketed in the study area (as at May 2017) has been compiled mainly from physical survey, a trawl of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed. The schedules for industrial (including warehouses and workshops), offices and retail/leisure space have been included in Appendix 11.

10.58 Across the study area of Central Lancashire, a total supply of 173,811 sqm of vacant space is reported. Of this, 76,697 sqm (44 percent of the total supply) can be found in Preston; 76,278 sqm (44 percent) in South Ribble and 20,836 sqm (12 percent) in Chorley.

Chorley

10.59 A total of 20,836 sqm of vacant space has been identified in Chorley. Just over two thirds of the space, 14,011 sqm is industrial. Table 67 details this availability by size band.

Table 67 – Chorley – Marketed Property by Size

| Area | | 0-50 | 51-100 | 101-300 | 301-500 | 501-1,000 | 1,001-2,000 | 2,001-5,000 | 5,001+ | Total |
|------------|------------------|------|--------|---------|---------|-----------|-------------|-------------|--------|--------|
| Office | No of Properties | 18 | 6 | 14 | 3 | 2 | 1 | ~ | ~ | 44 |
| | Floorspace (sqm) | 369 | 446 | 2,454 | 1,104 | 1,392 | 1,060 | ~ | ~ | 6,825 |
| Industrial | No of Properties | 1 | 3 | 4 | 1 | 3 | 2 | 3 | ~ | 17 |
| | Floorspace (sqm) | 37 | 193 | 696 | 460 | 1,691 | 2,128 | 8,806 | ~ | 14,011 |
| Total | No of Properties | 19 | 9 | 18 | 4 | 5 | 3 | 3 | ~ | 61 |
| | Floorspace (sqm) | 406 | 639 | 3,150 | 1,564 | 3,083 | 3,188 | 8,806 | ~ | 20,836 |

Source: BE Group, 2017

10.60 Key points to note include:

Industrial

- Available industrial units are found almost exclusively in Chorley and Buckshaw Village (76 percent) bar four units of 37-176 sqm at Coppull Enterprise Centre, Mill Lane, Coppull
- The largest single unit is the 3,958 sqm Unit 43, Drumhead Road, Chorley North Industrial Estate, Chorley. Two other premises of greater than 2,000 sqm are found at Common Bank Industrial Estate and Moorland Gate Business Park in Chorley
- Mid-sized units of 150-500 sqm are available at Harpers Lane/Botany Brow and Yarrow Business Centre
- There is a reasonable mix of good (29 percent) and moderate (53 percent) quality units, spread throughout the industrial estates, plus three budget options at Yarrow Business Centre
- Nothing, even amongst the larger premises, is being offered on freehold terms at present.

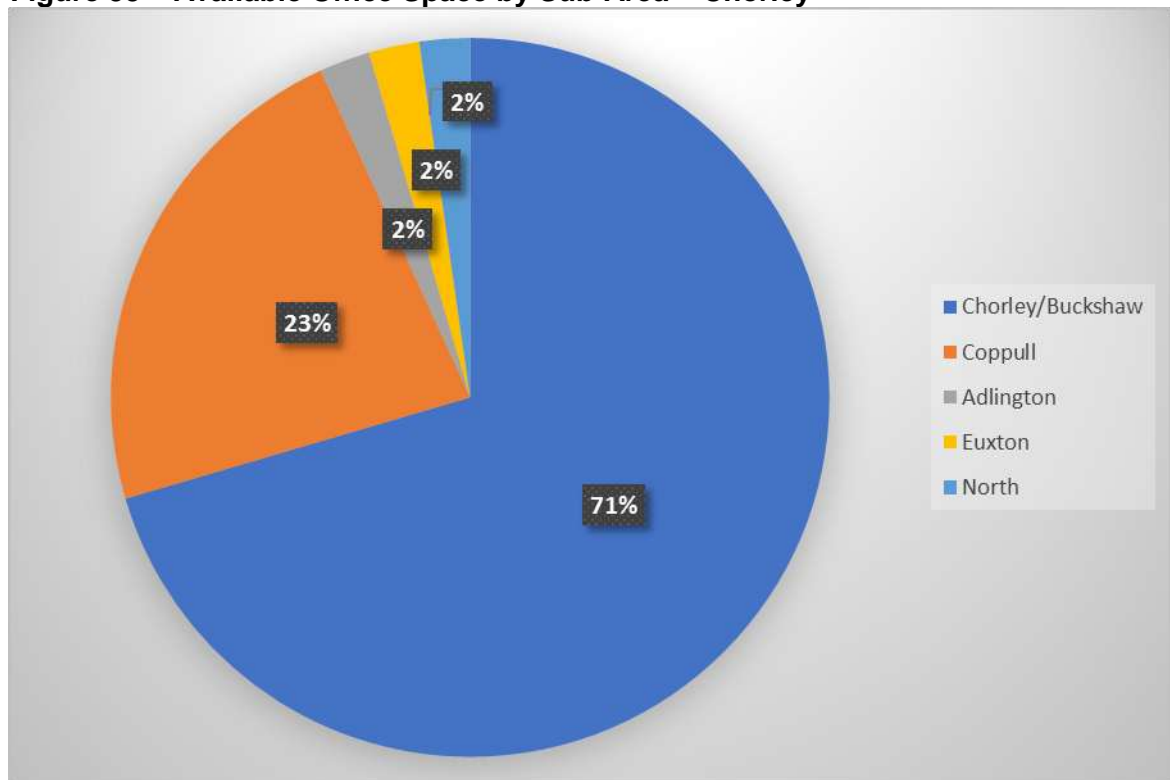
Offices

- 86 percent of the available office space is 0-300 sqm in size. The largest property currently on the market is the 1,060 sqm Lingmell House, Water Street, Chorley
- 31 office suites, 70 percent of the total, in 5,595 sqm of space are found in Chorley Town or Buckshaw Village (see Figure 35). The only other significant

source of office space locally is the Coppull Mill Enterprise Centre, which currently has 10 suites available, of 8-107 sqm and totalling 387 sqm. One suite each is available in Adlington, Euxton and in the northern settlements

- In Chorley Town, office schemes with available space include Ackhurst Business Park, with six suites available, offering properties of 24-183 sqm
- Office premises in Chorley are found to be exclusively moderate in quality with nothing in the high grade or budget markets
- No office premises in Chorley are currently available on a purely freehold basis, however two are available on either a freehold or a leasehold basis. Both of these are individual premises, one the 223 sqm Unit D, Clayton Green Business Centre and the other a 135 sqm on Ashfield Road in Chorley.

Figure 35 – Available Office Space by Sub-Area – Chorley



Source: BE Group, 2017

Preston

10.61 A total of 76,697 sqm of vacant space has been identified in Preston. Of this, 45,801 sqm (60 percent) is office. Table 68 details this availability by size band.

Table 68 – Preston – Marketed Property by Size

| Area | | 0-50 | 51-100 | 101-300 | 301-500 | 501-1,000 | 1,001-2000 | 2,001-5,000 | 5,001+ | Total |
|------------|------------------|--------------|--------------|---------------|---------------|---------------|---------------|--------------|--------------|---------------|
| Office | No of Properties | 40 | 35 | 50 | 45 | 12 | 4 | 1 | ~ | 187 |
| | Floorspace (sqm) | 1,114 | 2,500 | 8,838 | 16,468 | 8,423 | 5,910 | 2,548 | ~ | 45,801 |
| Industrial | No of Properties | 2 | 6 | 15 | 8 | 5 | 7 | 3 | 1 | 47 |
| | Floorspace (sqm) | 76 | 486 | 2,485 | 3,321 | 3,272 | 9,083 | 6,946 | 5,227 | 30,896 |
| Total | No of Properties | 42 | 41 | 65 | 53 | 17 | 11 | 4 | 1 | 234 |
| | Floorspace (sqm) | 1,190 | 2,986 | 11,323 | 19,789 | 11,695 | 14,993 | 9,494 | 5,227 | 76,697 |

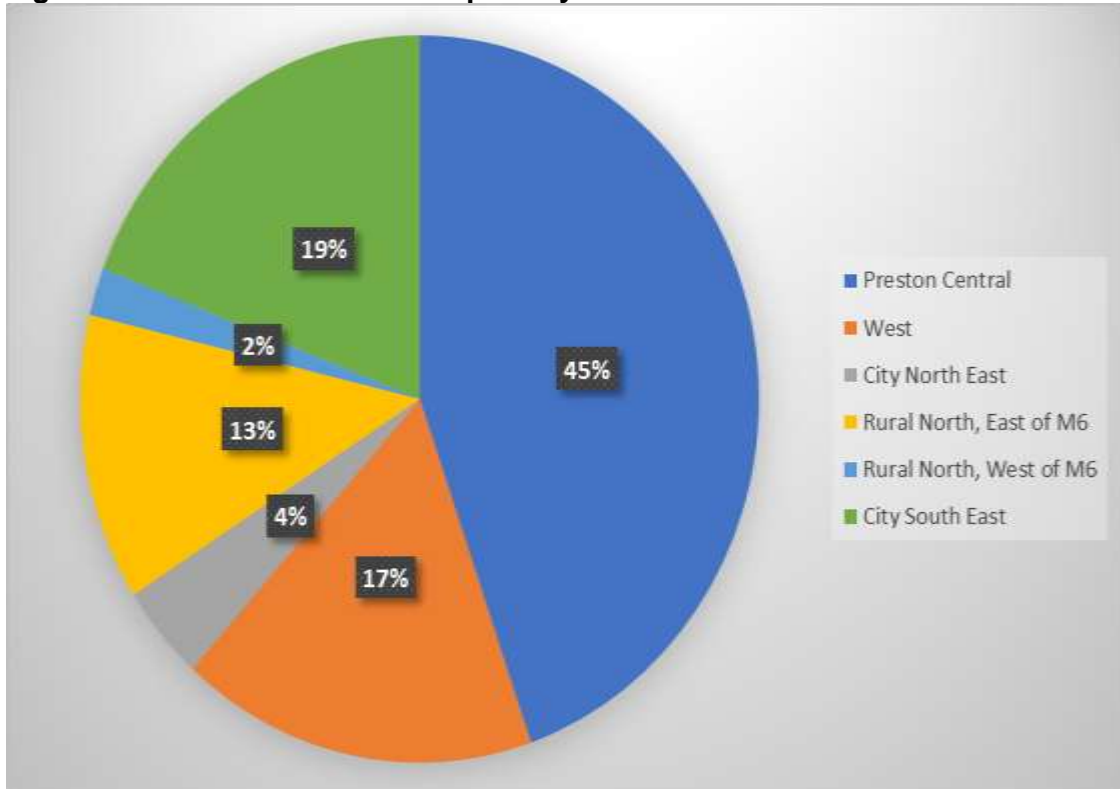
Source: BE Group, 2017

10.62 Key points to note include:

Industrial

- As Figure 36 shows, 45 percent of available industrial premises are found on edge of centre locations, in the West (Docklands and surrounding) or in the industrial estates of the South East of the City. These premises are generally contained to a few keys locations. Aqueduct Mill for example accounts for 2,587 sqm floorspace in the Central Area, with a similar situation in West with Preston Technology Centre where almost 40 percent of all premises in the area can be found
- Preston has industrial options across all size bands with the largest at 5,227 sqm, a property on Longworth Street in the City South East. The focus is on units of 51-500 sqm, although four properties of more than 2,000 sqm are also available, spread throughout the City
- Two thirds of the premises are moderate in quality, but 12 budget options have also been identified, most in Central Preston. Three good quality options have been identified in Riversway Business Park in the West and Astra Business Park in the South East
- Nine industrial properties are available on a freehold basis in Preston with options in Preston Central, West, City North East and City South East highlighted. For the most part, however these a single and dispersed options amongst a wider supply.

Figure 36 – Available Industrial Space by Sub-Area – Preston



Source: BE Group, 2017

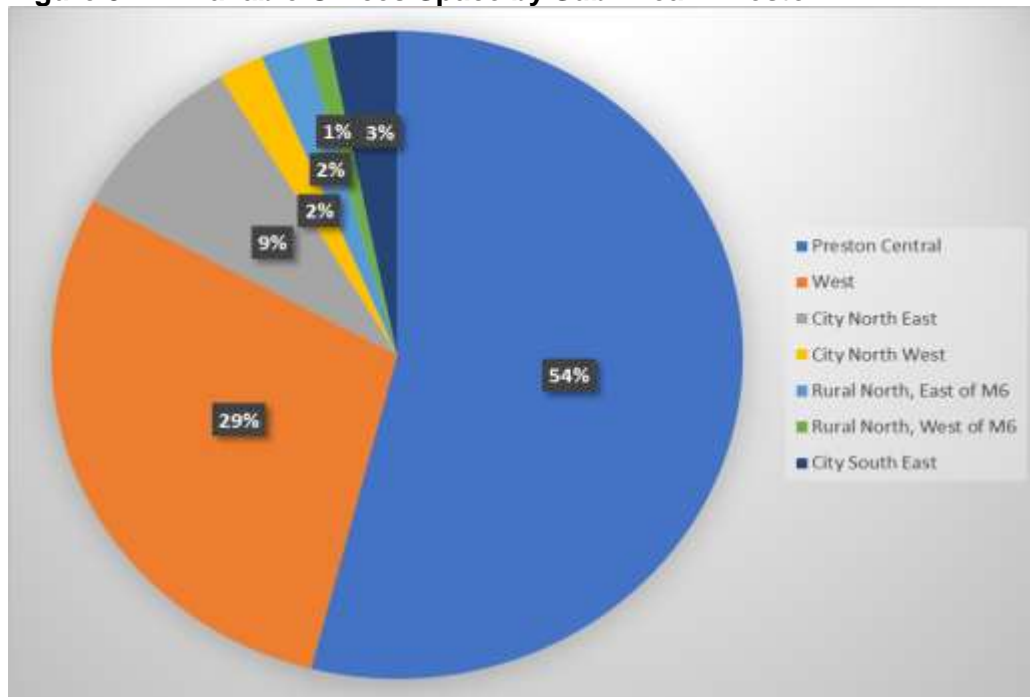
Office

- As Figure 37 shows, 54 percent of the City's available office premises (101) are found in the City Centre or edge of centre locations. Another 29 percent (54) are in the West of the City, i.e. in, and around, Preston Docks
- City Centre/Edge of Centre schemes with high availability include Preston Office Centre, with 5,576 sqm in 16 suites available, Victoria House, Marshall House and the Recycling Lives Centre. Elsewhere, available space is also mostly found in larger multi-let schemes, including Cliftonfields and Preston Technology Centre in the West; Fairways Business Park and Eastway Business Village in the City North East and Astra Business Centre in the City South East
- Preston has a comprehensive mix of available office property with options across all size ranges up to 5,000 sqm, although most suites are sub-500 sqm in size, with a focus on the 301-500 sqm category
- Just over three quarters (142) of the suites are moderate in quality. 34 good quality suites have been identified in the Central and Western areas of the City. In the City Centre these include suites in Winckley Square and at the Recycling Lives Centre, in the West these include suites in Lockside Office

Park. Measured by rent at least, Victoria House is the main budget scheme in Central Preston

- There appears to be a general lack of freehold options across the Borough, with only eight marketed options currently available. In addition to this, five properties are available on either a leasehold or freehold basis, all located in City North East, but together these options make up only 7 percent of the total available office space in Preston.

Figure 37 – Available Offices Space by Sub-Area – Preston



Source: BE Group, 2017

South Ribble

10.63 A total of 68,637 sqm of vacant space has been identified in South Ribble. Of this, 56,114 sqm (82 percent) is industrial. Industrial availability, as at May 2017 is 36,622 sqm less than vacancy rate at April 2015 (92,736 sqm), as identified in the previous South Ribble Employment Land and Property Study. The difference reflects the fact that there were a greater number of vary large, 2,000 sqm or greater, units on the market in Farington, Walton Summit and Bamber Bridge in 2015 than today – 13 in 2015 against 8 in 2017. In terms of smaller industrial premises and offices, the current availability profile is very similar to that in 2015. Table 69 details this availability by size band.

Table 69 – South Ribble – Marketed Property by Size

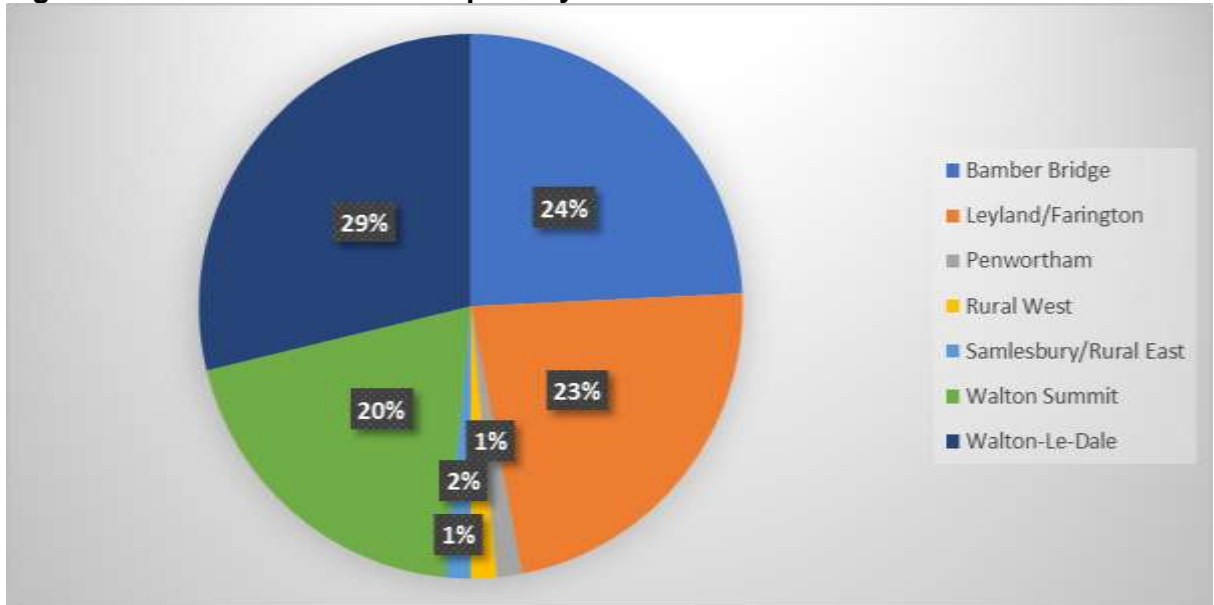
| Area | | 0-50 | 51-100 | 101-300 | 301-500 | 501-1,000 | 1,001-2000 | 2,001-5,000 | 5,001+ | Total |
|------------|------------------|-------|--------|---------|---------|-----------|------------|-------------|--------|--------|
| Office | No of Properties | 57 | 17 | 14 | 6 | ~ | ~ | ~ | 1 | 95 |
| | Floorspace (sqm) | 1,452 | 1,157 | 2,278 | 2,434 | ~ | ~ | ~ | 5,202 | 12,523 |
| Industrial | No of Properties | 16 | 7 | 14 | 10 | 5 | 6 | 5 | 3 | 66 |
| | Floorspace (sqm) | 381 | 482 | 2,646 | 3,729 | 3,840 | 9,223 | 20,273 | 23,181 | 63,755 |
| Total | No of Properties | 73 | 24 | 28 | 16 | 5 | 6 | 5 | 4 | 161 |
| | Floorspace (sqm) | 1833 | 1639 | 4924 | 6163 | 3840 | 9223 | 20273 | 28,383 | 76,278 |

Source: BE Group, 2017

10.64 Key points to note include:

- As Figure 38 shows, available industrial units are focused in four main settlement areas – Walton-Le-Dale (sub-100 sqm units at South Ribble Enterprise Park), Bamber Bridge, Walton Summit and Leyland/Lancashire Business Parks, Farington
- Walton Summit Centre currently has 17,449 sqm of space comprised of 13 individual units. These include the 8,000 sqm Ex Prestoplan Unit, 366 Walton Summit Centre. This is the largest industrial property on the market in Central Lancashire at present
- Most available units are 0-500 sqm in size, but there is also a reasonable supply of options greater than 1,000 sqm in size, in Walton Summit, adjacent areas of Bamber Bridge; Matrix Park, Buckshaw Village and Leyland/Lancashire Business Parks, Farington
- Most industrial space, 88 percent, is moderate in quality
- Only three units are available on a purely freehold basis, all of which can be found in Bamber Bridge as independent units away from Walton Summit Centre. There is a small supply of two units available on either a freehold or leasehold basis, one in Leyland/Farington at Peregrine Place (1,284 sqm) and the other at Walton Summit (1,217 sqm).

Figure 38 – Available Industrial Space by Sub-Area – South Ribble

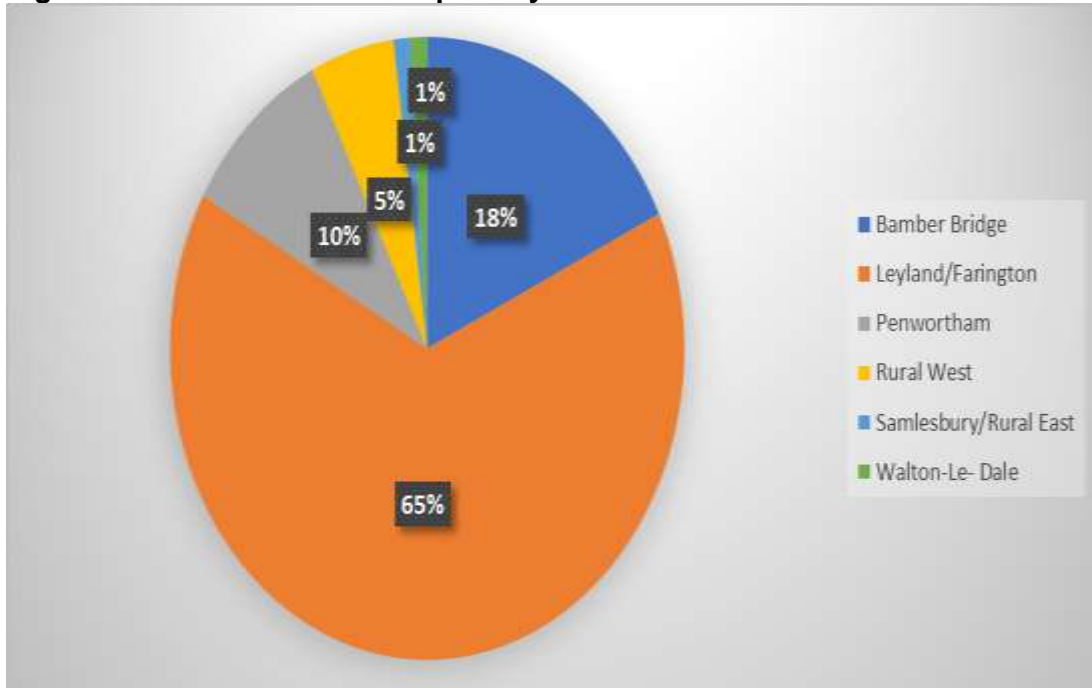


BE Group, 2017

Office

- As Figure 39 shows, most of the available space and premises can be found at Leyland/Farington and, more specifically, Leyland Business Park. In total, 1,066 sqm is being marketed at Leyland Business Park. Elsewhere, options at Penwortham can almost exclusively be found at Crossley House, and Swallow Park in Rural West
- The majority (60 percent) of available office premises in South Ribble are 0-50 sqm in size. The largest is 489 sqm bar the 5,202 sqm at Lancaster House at Farington which was on the market in 2015 and is back on the market after a period of partial occupancy
- 61 percent of available offices are of moderate quality but a supply of 36 good quality options has been identified, mostly at Leyland Business Park
- No freehold office options are on the market in South Ribble.

Figure 39 – Available Offices Space by Sub-Area – South Ribble



Source: BE Group, 2017

Valuation Office Data

Industrial

10.65 The latest Valuation Office (VO) statistics on total floorspace by local authority area are now some five years old so do not account for the most recent developments. Despite this, the data shows that:

- Chorley – There were 850 industrial hereditaments in the Borough, totalling 543,000 sqm in 2012. Within this there are 17 marketed premises totalling 14,011 sqm (see Table 67 above). This suggests an overall ‘occupancy rate’ for Chorley of 97.4 percent by floorspace. By premises numbers, the occupancy rate is 98.0 percent
- Preston – There were 1,290 industrial hereditaments in the Borough, totalling 970,000 sqm in 2012. Within this there are 47 marketed premises totalling 30,896 sqm (see Table 68 above). This suggests an overall ‘occupancy rate’ for Preston of 96.8 percent by floorspace. By premises numbers, the occupancy rate is 96.6 percent
- South Ribble – There were 900 industrial hereditaments in the Borough, totalling 1,046,000 sqm in 2012. Within this there are 66 marketed premises totalling 63,755 sqm (see Table 69 above). This suggests an overall

‘occupancy rate’ for South Ribble of 93.9 percent by floorspace. By premises numbers, the occupancy rate is 92.7 percent, figures not dissimilar to those noted in the 2015 study.

Offices

- Chorley – There were 590 office hereditaments in the Borough, totalling 89,000 sqm in 2012. Within this there are 44 marketed premises totalling 6825 sqm (see Table 67 above). This suggests an overall ‘occupancy rate’ for Chorley of 92.3 percent by floorspace. By premises numbers, the occupancy rate is 92.5 percent
- Preston – There were 1150 office hereditaments in the Borough, totalling 391,000 sqm in 2012. Within this there are 187 marketed premises totalling 45,801 sqm (see Table 68 above). This suggests an overall ‘occupancy rate’ for Preston of 88.3 percent by floorspace. By premises numbers, the occupancy rate is 85.7 percent
- South Ribble – There were 410 office hereditaments in the Borough, totalling 116,000 sqm in 2012. Within this there are 95 marketed premises totalling 12,523 sqm (see Table 69 above). This suggests an overall ‘occupancy rate’ for South Ribble of 89.2 percent by floorspace. By premises numbers, the occupancy rate is 76.8 percent. These rates are somewhat lower than those recorded in the 2015 Employment Land and Property Study – 89.3 percent by floorspace and 83.7 percent by premises numbers.

10.66 Schemes and areas with occupancy rates of 90 percent or more are considered well occupied, given the natural churn of business floorspace even in high demand markets. By this measure the main issue appears to be in the Preston and particularly South Ribble office markets, where occupancy rates, particularly by premises are somewhat lower, suggesting a degree of oversupply of space. It should be noted, however, that these figures may be skewed by local business centres which offer multiple small serviced suites to the market but may only count as single hereditaments in VO data.

Summary

10.67 The total Baseline Employment Land Supply for Central Lancashire, as defined in the Local Plans of the three authorities is 239.89 ha in 39 sites. This comprises:

- Chorley – 85.85 ha in 21 sites
- Preston – 99.52 ha in 11 sites

- South Ribble – 54.52 ha 7 sites.

10.68 However, an assessment of this supply, excluding land now developed, unlikely to be brought forward, completed for alternative uses or held for specific occupiers suggests a more realistic figure of **175.29 ha for Central Lancashire (the Realistic Supply), comprising:**

- **Chorley: 52.25 ha**
- **Preston: 70.68 ha**
- **South Ribble: 52.36 ha**

10.69 Table 70 provides a breakdown of the current realistic land supply by B Use Class.

Table 70 – Use Class Assessment (Realistic Supply)

| Area | Use Class | | | | | | | | Total | |
|--------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|
| | B1(a) | | B1(c)/B2 | | B2/B8 | | B1/B2/B8 | | | |
| | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) | No of Sites | Total Area (Ha) |
| Chorley | 1 | 0.80 | 6 | 17.20 | 2 | 10.16 | 5 | 24.09 | 14 | 52.25 |
| Preston | - | - | - | - | 4 | 56.08 | 6 | 14.60 | 10 | 70.68 |
| South Ribble | 1 | 0.45 | 4 | 20.51 | 1 | 9.20 | 1 | 22.2 | 7 | 52.36 |
| Total | 2 | 1.25 | 10 | 37.71 | 7 | 75.44 | 12 | 60.89 | 31 | 175.29 |

Source: BE Group, 2017

10.70 South Ribble contains two strategic land allocations – the 65 ha Cuerden Strategic Site and the 72 ha Samesbury Enterprise Zone. These are strategic locations, to be marketed primarily to companies outside of Central Lancashire and, in the case of the Enterprise Zone, outside of Lancashire. They are thus distinct from the established local supply.

10.71 At Cuerden, development partners have consent for the following B-Class employment, to be delivered over the next 17 years:

- A Northern Business Park of 5.73 ha fronting Lostock Lane and providing up to 26,000 sqm of floorspace
- A Southern Employment Area of 17.64 ha focused on larger manufacturing and storage uses and providing up to 80,000 sqm of floorspace

10.72 Market research is supportive of the slow but steady delivery of larger offices on the

Northern Business Park and particularly of a logistics offer in the Southern Employment Area.

10.73 The Samlesbury Enterprise Zone has been in operation for five years now. Key road infrastructure is in place and two facilities have been completed to date. These are BAE's Academy for Skills and Knowledge, an apprentice and training facility, and the Wincanton Defence Logistics Centre. Marketing of the remaining land, which includes some 35 ha in South Ribble, is ongoing.

10.74 The total strategic land supply of these two sites is thus **58.37 ha**.

10.75 A review of Central Lancashire's allocated Employment Areas was completed at Appendix 10. The results are not repeated here, but it is worth noting that Central Lancashire's flagship (A or B Grade) locations are:

Chorley

- Common Bank Area, Chorley
- Ackhurst Business Park, Chorley
- Chorley Business and Technology Park, Euxton
- Momentum/Southern Commercial Area/Revolution, Buckshaw Village

Preston

- ELR No 1: Millennium Business Park
- ELR No 7: Preston East Employment Area
- ELR No 19: Mondiboard, Longridge Road
- ELR No 27: Bow Lane
- ELR No 28: Riversway A – Portway / West Strand
- ELR No 30: North Preston Employment Area
- ELR No 54: Winckley Square / Chapel Street
- ELR No 65: Winckley Square (SW) / East Cliff
- ELR No 66: Winckley Square (South and East) / Cross Street
- ELR No 84: West Strand / Marsh Lane.

South Ribble

- Emp. Area 2: Sceptre Way, Bamber Bridge
- Emp. Area 3: Walton Summit Employment Area

- Emp. Area 8: Aston Moss, Leyland
- Emp. Area 10: Lancashire (Enterprises) Business Park, Farington
- Emp. Area 11: Moss Side Employment Area, Leyland
- Emp. Area 18: Matrix Park, Buckshaw Village.

10.76 There are several potential redevelopment/regeneration opportunities, which might deliver additional land supply, should it be required. However, these are caveated in that, with some exceptions, owner/developer aspirations for B1/B2/B8 development on these sites has not been tested.

10.77 Across the study area of Central Lancashire, a total supply of 173,811 sqm of vacant space is reported. Of this, 76,697 sqm (44 percent of the total supply) can be found in Preston; 76,278 sqm (44 percent) in South Ribble and 20,836 sqm (12 percent) in Chorley.

Chorley

- Available industrial units are found almost exclusively in Chorley and Buckshaw Village, with premises of 2,000 sqm or more found at Common Bank Industrial Estate and Moorland Gate Business Park in Chorley
- 86 percent of the available office space is 0-300 sqm in size. The largest property currently on the market is the 1,060 sqm Lingmell House, Water Street, Chorley. Most property is found in Chorley Town and Buckshaw Village
- No industrial space and only two offices are available freehold.

Preston

45 percent of available industrial premises are found on edge of centre locations, in the West (Docklands and surrounding) or in the industrial estates of the South East of the City.

- Preston has industrial options across all size bands with the largest at 5,227 sqm, a property on Longworth Street in the City South East. The focus is on units of 51-500 sqm, although four properties of more than 2,000 sqm are also available, spread throughout the City
- 54 percent of the City's available office premises are found in the City Centre or edge of centre locations. Another 29 percent are in, and around, Preston Docks

- Preston has a comprehensive mix of available office property with options across all size ranges up to 5,000 sqm, although most suites are sub-500 sqm in size
- 34 good quality suites have been identified in the Central and Western areas of the City. Again, freehold availability is limited.

South Ribble

- Available industrial units are focused in four main settlement areas – Walton - Le-Dale (sub-100 sqm units at South Ribble Enterprise Park), Bamber Bridge, Walton Summit and Leyland/Lancashire Business Parks, Farington.
- Most available industrial units are 0-500 sqm in size, but there is also a reasonable supply of options greater than 1,000 sqm in size, in Walton Summit, adjacent areas of Bamber Bridge; Matrix Park, Buckshaw Village and Leyland/Lancashire Business Parks, Farington
- Most of the available office premises can be found at Leyland/Farington and, more specifically, Leyland Business Park
- Bar the exceptional 5,202 sqm at Lancaster House at Farington, most suites are sub 50 sqm in size
- Only three industrial units and no offices are available freehold.

11.0 CONCLUSIONS

Introduction

- 11.1 This study has included a wide-ranging look at the factors affecting the economy of Central Lancashire, with particular reference to those that are likely to affect the future need for land and property within Chorley, Preston and South Ribble. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 11.0.
- 11.2 The study has been undertaken in line with both the National Planning Policy Framework and relevant Planning Practice Guidance. It complements the Central Lancashire Strategic Housing Market Area Assessment.

The Functional Economic Market Area

- 11.3 In the view of this study, the FEMA for Central Lancashire includes the Fylde Coast local authority areas of Blackpool, Fylde and Wyre which have strong links to Preston via the M55/A583. In Pennine Lancashire, Blackburn with Darwen and Ribble Valley also fall within the economic catchment area of Preston. In the west, West Lancashire has strong connections to South Ribble via the M6/M58, A59 and comparable routes. Finally, Chorley has a pronounced relationship with its Greater Manchester neighbours of Bolton and Wigan as a net exporter of labour. All the local authorities within this FEMA have been consulted.
- 11.4 Some overlapping market issues within the FEMA include:
- Bolton – The 80 ha Cutacre logistics development off Junction 4, M61 will compete with the Cuerden Strategic Site and Junction 31(a), Preston for requirements for businesses looking to serve the North West and particularly Greater Manchester market. At the smaller scale, the Horwich Loco site could provide competition for Chorley
 - Wigan – Local planning has allowed for several strategic sites here, which may compete with Central Lancashire. However, these are expected to deliver mostly housing options in the short-medium term
 - Blackburn with Darwen – The Whitebirk Site, at Junction 6, M65 is the closest competing strategic location to the Cuerden Strategic Site, it is expected to deliver larger B2/B8 uses over the next few years, but has yet to do so. It is

also hoped that the Borough can compete with Central Lancashire for requirements in the aerospace and advanced flexible materials sectors

- Ribble Valley – There is an inevitable cross boundary labour flow, particularly along the A59 and with the cross-boundary BAE Samlesbury site. However, apart from Samlesbury there are no other strategic scale sites and employment areas in Ribble Valley which could provide significant competition to those in Central Lancashire
- Blackpool - There will be a likely overlap in the aviation sector between Blackpool Airport and the Lancashire (Samlesbury-Warton) Enterprise Zones. However, there are also clear differences with the Lancashire Enterprise Zone focused on aviation manufacture and the BAE supply chain, particularly for defence activities. Blackpool Airport by comparison is a civilian and commercial facility, with a focus on the operational aspects of the aviation sector. The Airport Enterprise Zone also extends to include local office and industrial/warehouse areas which support occupiers in a range of more general business sectors
- Fylde - There are clear service sector linkages along the M55 Corridor, between Whitehills and Preston. However, Whitehills has seen little recent growth and is not attracting larger inward investment opportunities that might otherwise have gone to Central Lancashire
- Wyre – Hillhouse Business Park in Thornton-Cleveleys is expected to meet large-scale chemicals sector requirements in the region, especially when combined with a growing chemicals sector offer in West Runcorn
- West Lancashire – Strategic scale will be focused around Skelmersdale. Skelmersdale is an established and growing logistics location which will compete with Central Lancashire for logistics and industrial requirements emerging from the growing Liverpool Superport.

Economic Profile

11.5 The socio-economic profile shows that Central Lancashire had a 2016 population of 366,300. That population has grown by 5.2 percent over the last 10 years, a growth level well above LEP area and regional averages. Population by Borough is:

- Chorley – 114,400 a 10.2 percent change on 2006
- Preston – 141,800, a 2.9 percent change on 2006
- South Ribble – 110,100, a 3.4 percent change on 2006.

- 11.6 Around three quarters of the Central Lancashire workforce is active, which reflects national rates. South Ribble has the highest proportion of people in employment (83.4 percent), and Preston has the lowest (68.5 percent). Likewise, Preston has the highest unemployment rate at 6.2 percent, and South Ribble has the lowest at 3.5 percent.
- 11.7 On average, 8.2 percent of workers were self-employed across Central Lancashire in 2016, primarily in Chorley, where 11.9 percent were self-employed, and Preston, where 9.2 percent were. Levels of homeworking in Central Lancashire were on a par with the North West, and slightly less than for England. Local skill levels are reasonable, and Chorley has a very high proportion of people trained to NVQ Level 4 or greater, which equates to degree level education.
- 11.8 Around 30 percent of Central Lancashire's working population are employed in the public sector, in public administration, education and health. This is above the national level of 26 percent but in line with Lancashire and North West averages. Public sector employment is focused in the health sectors of Chorley and Preston, i.e. is associated with the main hospitals, and in public administration in Preston. Overall, the of Central Lancashire health sector has lost some 2,300 jobs since 2009 while public administration and defence has gained 1,187. The latter growth was focused in Preston while Chorley saw sizable losses over the 2009-2015 period.
- 11.9 After retail and health, the strongest single sector in Central Lancashire is construction at 9.6 percent. This sector gained some 1,700 jobs locally over 2009-2015. Most of that growth, a gain of almost 2,000 jobs, was in South Ribble, with the Central Lancashire total reduced by a loss of some 300 jobs.
- 11.10 Central Lancashire also compares well to Lancashire and the North West on employment in business administration and support services. Preston saw its best growth in this sector, gaining some 2,300 jobs over 2009-2015. However, Chorley recorded a decrease of 2,800 jobs in this sector, over the same period, a surprising level of reduction which, which is difficult to attribute to any specific cause. Good growth was also observed in information and communication. This sector grew by some 1,300 jobs in South Ribble, but saw a 1,000-job reduction in Preston.
- 11.11 Manufacturing and logistics are particular strengths of South Ribble. Across Central Lancashire, manufacturing also saw an employment reduction of some 10 percent, or

around 1,400 jobs. That reduction was spread relatively evenly through the three local authorities, each seeing 400-600 jobs reduced.

11.12 The number of VAT and PAYE registered businesses in Central Lancashire was 12,995 in 2016, equating to a business density of 58 per 1,000 working age residents. By Borough, the split of companies is:

- Chorley – 4,200 (32.3 percent), 59 per 1,000 pop
- Preston – 5,005 (38.5 percent), 54 per 1,000 pop
- South Ribble – 3,790 (29.2 percent), 56 per 1,000 pop.

11.13 87.7 percent of Central Lancashire companies are micro-businesses (less than 10 employees). 97.7 percent employ up to 49 people (small businesses).

11.14 The overall local stock of businesses has been increasing over time and in Central Lancashire the recorded growth was 13 percent over the last six years. This growth in the number of businesses has outperformed the Lancashire LEP rate of 10 percent increase over the same period, but was modest in the regional and national context of 20-23 percent growth. Of the three Authorities, Chorley saw the best improvement at 13 percent, South Ribble the weakest at 7 percent.

Property Market Assessment

11.15 Nationally and regionally the prospect is for increased demand in all the main commercial sectors as the UK economy continues a period of growth. Increased demand following a period of limited development is generating stock shortfalls which are in turn encouraging development activity. For the first time since 2007 speculative development is a realistic prospect outside of prime city economies, albeit primarily for light industrial space and major warehouse options, and demand for freehold options is growing both from occupiers and investors.

11.16 Stakeholders report a lack of readily available employment land across Central Lancashire. This reflects the losses of employment land to housing in some locations and infrastructure constraints on key locations such as Moss Side Test Track, Leyland and Junction 31a, M6 Preston. However, rents and prices are, with some exceptions, still below the levels needed to support speculative schemes.

Industrial Market

11.17 Nationally and regionally, market demand has grown steadily over 2013-2017, with no short or medium-term prospects of it slowing. Headline rents are growing with

rates of £6-7/sqft expected for mid-sized units in prime North West locations by the end of 2017. This is partially due to the slowing in the number of speculative developments, something evident in Central Lancashire, which will inevitably drive prime rents up. Owner occupiers are becoming more prevalent, leading to greatly strengthened freehold demand, but local markets frequently lack the freehold stock to meet needs.

Local Industrial Market

- 11.18 The local market appears to require industrial units of up to 1,500 sqm in size, although units of up to 300-900 sqm have been most commonly transacted and are the most regular subject of enquiries. Larger businesses are looking for industrial and warehouse units of up to 5,000 sqm. Historically, transactions in this size range have most commonly occurred in South Ribble.
- 11.19 There is an undersupply of premises in all three areas, and for all types and tenures within this size range. Rents for reasonable quality space are at £6.50/sqft although the best light industrial schemes can attract rents of up to £10/sqft.
- 11.20 The business survey showed a business base which is confident about its future overall but not expecting to see significant growth in staffing, trade, etc. in the short or medium term. Overall, around 10 percent (86) of the 850 businesses contacted will seek new premises in the next three years, mostly to allow growth in operations or upgrades in premises. Around a quarter of those requirements (23) are for industrial space, with local companies seeking units of not more than 200 sqm in size and generally not more than 100 sqm in Chorley and South Ribble. Most businesses wish to move within the Borough they currently trade in.
- 11.21 There is sufficient space overall to meet these requirements but a notable shortage of freehold units in all three local authority areas, but most particularly in Chorley followed by Preston.
- 11.22 Amongst the 26 larger businesses contacted there is a reasonable desire for growth, even if prospects are somewhat subdued on 2015, and there is a degree of concern about long term economic conditions in the face of Bexit. Ten of the 26 businesses are looking to grow, and industrial requirements range up to 1,000 sqm, although frequently these sit within requirements for land which can extend up to 16 ha. Clearly, sites of this upper size would be hard to find in Central Lancashire although most companies want options of 1-6 ha which would be more deliverable.

- 11.23 In terms of jobs growth, Baseline forecasts suggests job losses in the manufacturing sector. However, once allowances are made for City Deal and the Strategic Sites, Preston is forecast to gain some 776 manufacturing jobs to 2034 and South Ribble some 1,500. Even without, a Policy-On allowance, Central Lancashire will gain some 4,158 construction jobs, three quarters of these in South Ribble. This job increase alone generates needs for some 13,000 sqm of additional industrial and storage/distribution floorspace. Allowing for policy, Preston generates 920 Construction jobs to 2034 and 4,809 in South Ribble, collectively requiring 17,900 sqm of floorspace.
- 11.24 Few companies reported any issues with skills or staffing in industrial sectors, including advanced manufacturing.
- 11.25 In terms of supply, 108,662 sqm of industrial space was vacant at May 2017, comprising:
- Chorley: 17 marketed premises totalling 14,011 sqm – 2.6 percent of the total floorspace and 2.0 percent by premises numbers
 - Preston: 47 marketed premises totalling 30,896 sqm – 3.2 percent of the total floorspace and 3.4 percent by premises numbers
 - South Ribble: 66 marketed premises totalling 63,755 sqm – 6.1 percent of the total floorspace and 7.3 percent by premises numbers.
- 11.26 This is considered low in average supply terms and points to a lack of availability and choice, in all three Boroughs but particularly Chorley and Preston. What is on the market is generally of the right size range, with smaller space of 0-500 sqm offered, plus some options of 1,000-2,000 sqm, or greater, to meet the needs of larger businesses. Available space is generally found in the most desirable locations, including Buckshaw Village/Euxton Lane and the Common Bank areas of Chorley; and Walton -Le-Dale, Bamber Bridge, Walton Summit and Leyland/Lancashire Business Parks, Farington in South Ribble. Space in Preston is more spread through the City. As noted, the main identified supply gap is for freehold units of all sizes.
- 11.27 Developers recognise the high demand levels and relative supply shortages in Central Lancashire. Accordingly, most developers contacted are actively looking to acquire and refurbish second-hand schemes to meet those needs. Design and build freehold options of 1,000-11,000 sqm are also available at several locations which

can meet the needs of larger businesses which have the finance to use this route. Viability and rental levels are still a barrier to new speculative development though, except for light industrial units of sub 100 sqm which have been successfully and viably delivered in several locations in South Ribble. More developments of this type are likely.

- 11.28 At the opposite end of the scale, there are several strategic and Central Lancashire scale sites which are likely to deliver larger premises in the medium and longer term. In addition to the Cuerden Strategic Site, discussed below, EP1.3: Land to the North East of M61 junction (Gale Moss) Chorley offers reasonable delivery prospects as do HCA owned sites in North East Preston. The C2: Moss Side Test Track, Leyland (Doll Lane) site in South Ribble may also provide a strong offer but only if current issues can be overcome.

Warehouse Market

- 11.29 Nationally, growth prospects for the warehouse/distribution property market remain good with record amounts of space being transacted. Against this need only around one year's supply remains and the North West in particular lacks Grade A logistics space. Prime rents for distribution/warehouse units of above 5,000 sqm sit at £6.15/sqft in Manchester and Warrington. Rents of this level are being achieved in prominent locations elsewhere in the North West.

Local Warehouse Market

- 11.30 Local demand is for warehouses of up to 5,000 sqm alongside industrial options, with a preference for freehold rather than leasehold properties. Central Lancashire has attracted major logistics operators in the past, primarily to Buckshaw Village and Junction 31a, Preston. Most recently, Amazon acquired 16,258 sqm of existing space at Lancashire Business Park, Farington.
- 11.31 Of the 86 companies, responding to the Business Survey, who said that they required property 18.6 percent (16) wanted warehouse options, with requirements strongest in Chorley. Again, requirements extended up to 5,000 sqm with a strong freehold element that cannot easily be met in the current premises supply.
- 11.32 Amongst the larger businesses contacted, requirements in the B8 sector tended to be for land as much as premises, coming from local established companies such as coach operators, caravan builders and builder's merchants. As noted land requirements extend up to 16 ha, but are most commonly 1-6 ha.

- 11.33 Forecasts of jobs growth in the Transportation and Storage Sector are negligible under Baseline forecasts. Policy-On estimates suggest local-level growth will be concentrated in South Ribble with a gain of 1,174 jobs, equating to some 39,000 sqm of floorspace projected to 2034.
- 11.34 Going forward, the Southern Employment Area of the Cuerden Strategic Site proposed 80,000 sqm of B2/B8 floorspace, likely to meet regional scale logistics needs. This would be a valuable resource for the region, providing space at a time when existing schemes such as Omega, Warrington are reaching capacity, while new sites such as Parkside, St Helens are still some years from providing viable development plots. The largest single property which could be developed on the site would be in the region of 65,000 sqm. This could accommodate Regional Distribution Centre (RDC) requirements, for example the Waitrose RDC, Buckshaw Village is 39,000 sqm in size, but would struggle to meet the largest National Distribution Centres (NDCs) which can extend up to 90,000 sqm and require in excess of 20 ha of land each. Smaller scale units of up to 23,000 sqm are also likely, extending down to the 5,000 sqm range required by Central Lancashire's larger companies. Small/mid-scale B8 is also likely to be a feature at EP1.3: Land to the North East of M61 junction (Gale Moss), Chorley, where a motorway linked scheme of some 27,000 sqm is proposed. Larger warehouse opportunities are also possible in North East Preston but the lack of north bound slip roads at Junction 31a, M6 reduces the attractiveness of this location to logistics operators.
- 11.35 Samlesbury Enterprise Zone is aimed at advanced manufacturing uses, but an element of B8 is also likely, linked to BAE's supply chain and distribution requirements. Indeed, Wincanton are already providing such services in the area.

Office Market

- 11.36 While Manchester and Liverpool remain the North West office markets of national significance, smaller centres such as Preston are seeing increased demand from a broader range of professional services, ICT and business administration sectors. There remains a significant regional and national shortage of Grade A space. Speculative development is a prospect in major cities and commitments are at their highest level since 2009. However, it is unclear how many schemes will actually have commenced by the end of 2017, given uncertainties in the UK political and economic spheres and resulting caution in the investment market.

Local Office Market

- 11.37 Local office demand is focused in Preston, and to a lesser degree Chorley. Most companies want suites of less than 50 sqm and enquiries and past transactions for space have rarely exceeded 300 sqm. Rents of around £10-12/sqft are achievable generally, rising to £14.50/sqft in Ackhurst Park, Chorley and £15/sqft in Preston City Centre. In Both Preston and Chorley, micro business schemes are doing well but there is a more general oversupply of older stock, most particularly in Preston City Centre.
- 11.38 Preston City Centre is felt to be attractive to inward investors, with a property offer far more affordable than Manchester's. However, the City lacks the Grade A offer required to make it more strongly competitive, while achievable rents are still below the levels required to support investment in such space. In the short-medium term a range of large requirements are expected from existing major City Centre occupiers looking to upgrade their premises. Such companies will not necessarily stay in Preston City Centre but rather may seek more flexible options at Preston Docks, North East Preston, Cuerden (when developed) or even Buckshaw Village. If this is indeed the case it may result in some large City Centre voids, which are hard to fill.
- 11.39 Of the 86 companies, responding to the Business Survey, who said that they required property 43 percent (37) wanted unserviced offices. This demand was spread across Preston and Chorley. Office requirements extended up to 200 sqm. Again, many wanted freehold options which are not readily available in any of the Borough's in large numbers.
- 11.40 In other ways, both large and small businesses, are satisfied with Central Lancashire. Businesses in Preston's key financial services industries report they can meet their labour needs from within Central Lancashire and its wider FEMA. Other types of business, including high tech firms also report a lack of issues. Parking and building design can be more of a barrier for companies with large and shift based workforces. In time, this may push some large firms to relocate but at present, office requirements are more modest, with the largest not exceeding 700 sqm.
- 11.41 Oxford Economics forecasts suggest that central Lancashire will see gains of 5,882 jobs to 2034 in office based sectors, primarily professional services and administration/business support, requiring up to 70,000 sqm of further floorspace. That jobs gain is, perhaps surprisingly, focused in Chorley (2,780 extra jobs requiring

15,000 sqm of additional floorspace), followed by Preston (1,676 extra jobs requiring 20,000 sqm of additional floorspace) and then South Ribble (1,449 extra jobs requiring 17,000 sqm of additional floorspace). Gains with a Policy-On allowance are:

- Preston – 2,212 extra jobs requiring 26,000 sqm of additional floorspace
- South Ribble – 7,538 extra jobs requiring 89,000 sqm of additional floorspace

11.42 In terms of supply, 65,149 sqm of office space was vacant at May 2017, comprising:

- Chorley: 44 marketed premises totalling 6,825 sqm – 7.7 percent of the total floorspace and 7.5 percent by premises numbers
- Preston: 187 marketed premises totalling 45,801 sqm – 11.7 percent of the total floorspace and 14.3 percent by premises numbers
- South Ribble: 95 marketed premises totalling 12,523 sqm – 10.8 percent of the total floorspace and 23.2 percent by premises numbers.

11.43 Supply of offices is much larger than that for industrial, particularly for Preston and South Ribble and could suggest a degree of oversupply. In the case of Preston, supply is focused in the City Centre and reflects comments made about likely excesses of stock here. Offices in Chorley focused in Chorley Town and Buckshaw Village, in South Ribble the are focused in the business parks of Farington, all desirable locations. Most available suites are smaller though, sub-100 sqm in size which is the size range required.

11.44 From the developer perspective, the office market remains broadly challenging. In Chorley, Ackhurst Park has proved a success and is close to capacity. To achieve these however, has required the sub-division of larger suites into 20 sqm unserviced starter units, suitable for new businesses who cannot afford full serviced properties. Further development in this area is unlikely. At Buckshaw Village, the proposed office scheme at Employment Site EP1.13: Southern Commercial has seen good demand but is struggling to achieve the rental levels, around £15.95/sqft, which would encourage the developers to deliver. A 13,000-26,000 sqm office park is proposed at the Cuerden Strategic Site but, as is noted below, is phased for an extended (16 years or more) period and likely to be delivered primarily through design and build options.

11.45 An exception to this is the Digital Health Park and related scheme at Employment Site EP1.5 Euxton Lane, Chorley, where delivery is expected to start in 2018. This reflects a joint effort by private partners and Chorley Council, with public grant support and a residential element for cross funding so illustrates how development can be realised but is not typical of activity elsewhere.

11.46 Thus, large scale delivery of speculative offices appears unlikely for the foreseeable future.

Serviced Accommodation

11.47 As noted above, the strongest demand and the best prospects for new premises delivery are found at the micro business end of the market, including freehold and leasehold industrial units of 100-200 sqm. In the office market, scheme owners have enjoyed the best recent success when they have sub-divided properties to produce suites of less than 50 sqm each. These are generally aimed at both start-ups and existing micro firms.

11.48 However, for the most part the office options being produced are unserviced or 'managed' in that they offer suites on flexible licence terms and provide meeting rooms, but few other facilities or services. The latter are marketed to start-ups and micro firms, including those who cannot afford serviced space. Light industrial units are similarly not managed workspace, particularly as many new units are being sold freehold.

11.49 At the Central Lancashire scale of this study at least, demand for further specifically serviced options appears limited. The Regus scheme at Preston Docks is doing well and a further such scheme is possible in the City. However, this is the only strong evidence of serviced demand noted in Central Lancashire. Of the 86 businesses with property requirements, identified in the Business Survey, only four (three in Chorley, one in Preston) sought specifically serviced offices. None said they wanted managed light industrial workspace, indeed the majority sought to buy accommodation. South Ribble-based scheme managers Orvia also report that demand is for supported/lightly managed grow on space rather than serviced incubation options.

11.50 Stakeholder discussions suggest that where offices have been converted to serviced space they have enjoyed only modest success, with examples including Marshall House, Ringway, Preston.

11.51 The premises needs of Central Lancashire are summarised in Tables 71 and 72

Table 71 – Premises Need by Type – Local Needs

| Type of Need | Size Range | Evidence of Demand | Preferred Locations |
|---|---|---|---|
| Light Industrial Units, Including Freehold Options | Mostly 0-100 sqm, not exceeding 300 sqm | <ul style="list-style-type: none"> Main product delivered speculatively since 2015, at Buckshaw Village and South Rings, Cuerden. All units sold or let off plan before completion Around 40% of public enquiries in South Ribble were for units of 0-100 sqm, comparable amounts in the other Boroughs for sub-300 sqm units Business Survey identified good demand for 100-200 sqm units Jobs growth of 4,158 is forecast in the construction sector to 2034 (5,729 for Policy-On scenarios for Preston/South Ribble), generating needs for 13,000-17,000 sqm of additional floorspace which is likely to primarily comprise smaller industrial and storage requirements Gains in manufacturing jobs are more uncertain, but likely under Policy-On allowances for Preston/South Ribble 0-300 sqm units most commonly transacted previously, particularly in Chorley and Preston Stakeholders report significant unmet in all areas and a growing desire amongst micro business owners to invest in freehold property. This trend is enhanced by the increasing availability of commercial mortgages There is a particular shortage of freehold options | <p>Preferred are smaller infill sites in modern industrial estates, accessible to the strategic road network and in proximity to services. In addition to South Rings, Cuerden and Matrix Point, Buckshaw, where premises have been delivered, some other viable locations could include:</p> <p><i>Chorley</i></p> <ul style="list-style-type: none"> EP1.8: Lyons Lane Mill, Townley Street Chorley – centrally located site with a compatible consent EP1.11: The Revolution, Buckshaw Avenue, Buckshaw Village/ EP1.12: Group 1, Buckshaw Village/ EP1.13: Southern Commercial, Buckshaw Village (southern site) – High grade expansion sites in a key market area of Chorley <p><i>Preston</i></p> <ul style="list-style-type: none"> EP1.1: Whittingham Hospital – A viable/deliverable use option for the B-Class element here EP1.3: Preston East Employment Area – Open land, accessible to M6 EP1.7: Land North of Eastway – A viable/deliverable use option for the B-Class element here <p><i>South Ribble</i></p> <ul style="list-style-type: none"> E1(e): West Paddock, Leyland – A likely use here although distance from strategic road network and adjacent housing would be issues |
| Mid-Range Industrial Options Including Freehold Options | 300-900 sqm, with options up to 1,000 sqm | <ul style="list-style-type: none"> Two thirds of industrial enquiries were for units of up to 900 sqm in Preston Agents report steady demand up to 1,500 sqm from local businesses looking to grow across all three Boroughs, including freehold options Larger businesses in Central Lancashire commonly have property requirements up to 1,000 sqm Policy-On jobs forecasts, allowing for Strategic Sites, suggest good construction industry jobs growth and reasonable manufacturing sector growth | <p>Requirements for premises of this kind seen in all three Boroughs, and the location requirements are similar to the above. Could be accommodated on most of the sites mentioned above, with allowance made for greater space needs and increased HGV traffic potential.</p> |
| Larger industrial/ware | Up to | <ul style="list-style-type: none"> Enquiries data shows market interest for units in all size brackets up | <p>The largest 'local' scale requirements which may come from within Central Lancashire. Requirements of this size may only come infrequently, but when</p> |

| Type of Need | Size Range | Evidence of Demand | Preferred Locations |
|---|------------|---|--|
| house units Including Freehold Options | 5,000 sqm | <p>to 2,300 sqm in South Ribble</p> <ul style="list-style-type: none"> • Past transaction evidence, suggests that mid-sized units of 1,001-5,000 are the most common sizes transacted, in South Ribble. 78 Deals at this scale were recorded over the last decade • Agents report regular enquiries in the 4,000-5,000 sqm range for industrial and warehouse options, covering the whole of Central Lancashire • Individual industrial and warehouse requirements, identified thin the Business Survey, extend up to 2,001-5,000 sqm, with 20 larger companies, seeking such growth in South Ribble over the next three years • South Ribble is forecast to gain some 1,174 storage and distribution jobs, or 39,000 sqm of floorspace to 2034 under Policy-On scenarios | <p>they do, Central Lancashire needs to have the space available to accommodate them if it is to be competitive. Many requirements will be for a mix of B2 and B8 space and so sites must be able to accommodate both, including the HGV journey levels and strategic road access requirements of logistics operations. The historic market focus for such larger industrial/warehouse premises has been South Ribble, but needs extend across Central Lancashire. Some viable locations could include:</p> <p><i>Chorley</i></p> <ul style="list-style-type: none"> • EP1.3: Land to the North East of M61 junction (Gale Moss) Chorley – The current Outline planning application seeks units of this size range on a motorway accessible site • EP1.15: Land east of Wigan Lane, Clayton-Le-Woods – Scale of site would support larger units although access and proximity to housing may be barriers <p><i>Preston</i></p> <ul style="list-style-type: none"> • EP1.2: Red Scar Site H/ EP1.4: Red Scar Industrial Estate – Accessible sites marketed for design and build options in this size range (but could also suit smaller properties, as described above) • The largest expansion sites of North East Preston – EP1.10: Preston East Junction 31A M6 and EP1.11: Roman Road Farm – are of a scale which supports such uses. Limitations of Motorway access at Junction 31s (no northbound slip roads) would be barriers though <p><i>South Ribble</i></p> <p>The Cuerden Strategic Site will be the prime site for meeting such larger requirements, with the Samlesbury Enterprise Zone meeting specialist needs in advanced manufacturing sectors. C2: Moss Side Test Track, Leyland (Doll Lane) would be a strong secondary location in terms of the scale and quality of premises which could be offered and the critical mass of larger employers nearby</p> <p>Land at Lancashire/Leyland Business Parks, Farington is also of a scale to meet needs although would be less desirable to companies which require immediate motorway/major road access.</p> <p>Walton Summit is also identified as a desirable location for larger industrial operators although there is little land to meet neds at present.</p> |
| Micro | Suites of | <ul style="list-style-type: none"> • Office requirements in South Ribble are generally for small suites, | Meeting the smallest office requirements will be a question of premises |

| Type of Need | Size Range | Evidence of Demand | Preferred Locations |
|--|------------------------------|---|---|
| Business/Start-Up Offices Managed but not necessarily serviced/business centres | up to 50 sqm | <p>with 40 percent of enquires for sub-100 sqm units</p> <ul style="list-style-type: none"> Two thirds of those enquiring for office space In Chorley sought suites of less than 300 sqm. Of this, 35 percent were for less than 93 sqm Agents report that in Preston City Centre, the most popular space option is 2-4 person suites, up to 50 sqm. Chorley has strengths in financial and professional services. Agents report that, outside of Buckshaw Village local businesses are seeking suites of 50 sqm or less | <p>rather than land. Evidence is that need is focused in Preston (City Centre/Docks) and Chorley (Chorley Town/Buckshaw Village) and property owners have been working to sub-divide existing buildings to provide managed/unserviced options. This has met a lot of needs and will likely continue to do so. New micro-business offices could be provided on a range of sites across Central Lancashire which enjoy good access to services and public transport, but viability considerations will discourage delivery on many sites. The exception is likely to be EP1.5: Euxton Lane, Chorley where a specialist micro-business scheme is actively proposed and supported through funding.</p> |
| Larger offices for established firms/inward investors | Up to 500-700 sqm on average | <ul style="list-style-type: none"> Almost three quarters of deals in Central Lancashire were for suites of up to 300 sqm, with the 101-300 sqm size range most active in all three authority areas Agents suggest demand, focused on Preston and Chorley for suites up to 500 sqm. However, comments from stakeholders and the business survey suggests that over time expanding/relocating businesses, plus an element of inward investment, will generate requirements up to 700 sqm Major gains in office based employment are forecast to 2034. By the Baseline measure these equate to 5,882 extra jobs and 70,000 sqm of extra floorspace to 2034. Under Policy-On scenarios the Preston/South Ribble specific gain would be 9,750 jobs and 115,000 sqm of floorspace Over the last decade, a modest level of larger transactions in the 1,000-5,000 sqm range was recorded in Preston, 23 individual deals. Demand may support individual building development of this scale, but not a scheme of such major offices | <p>Chorley, Preston and particularly Preston City Centre, could benefit from investment in new modern office premises which could both meet the growth needs of Central Lancashire service sector businesses and allow competition for inward investment. In practice, achieving financially viable new development, other than design and build for specific occupiers, is challenging and likely to remain so for some years yet. However, there is a strong chance of larger office provision at the Cuerden Strategic Site, serving the Preston Conurbation along with smaller scale office provision at EP1.5: Euxton Lane, Chorley.</p> <p>Several smaller sites may also deliver offices within mixed-use schemes, where B1(a) development can be cross-funded by other uses. These include:</p> <p><i>Chorley</i></p> <ul style="list-style-type: none"> EP1.6: Cowling Farm, Chorley – Although site’s location may favour industrial uses over offices EP1.15: Land east of Wigan Lane, Clayton-Le-Woods <p><i>Preston</i></p> <ul style="list-style-type: none"> EP1.1: Whittingham Hospital EP1.7: Land North of Eastway (formerly Broughton Business Park) <p><i>South Ribble</i></p> <ul style="list-style-type: none"> C2: Moss Side Test Track, Leyland (Doll Lane) – B-Class element assumed to be primarily B2/B8 though |

| Type of Need | Size Range | Evidence of Demand | Preferred Locations |
|--------------|------------|--------------------|---|
| | | | <ul style="list-style-type: none"> • C1: Pickering’s Farm, Bee Lane, Penwortham – Supporting the Preston market <p>In Chorley EP1.13: Southern Commercial, Buckshaw Village (southern site) has been consented and marketed to office users, attracting interest, but has been unable to achieve a viable scheme. A way forward here might be for industrial development which has been successfully delivered on adjacent land.</p> |

Source: BE Group, 2017

Table 72 – Premises Need by Type – Strategic Needs

| Type of Need | Size Range | Evidence of Demand | Preferred Locations |
|--|-------------------------|--|--|
| RDC Level Logistics Facilities | Likely up to 40,000 sqm | <ul style="list-style-type: none"> • 2016 saw the highest amount of national large shed take-up on record. • Against needs however, England only has one year of larger logistics supply remaining and the North West has a particular shortage of Grade A space • Existing schemes such as Omega, Warrington are reaching capacity, while new sites such as Parkside, St Helens are still some years from providing viable development plots • Past completions, including Waitrose, Buckshaw Village, Amazon, Farington; James Hall. Preston and the Wincanton Defence Logistics Facility, Samlesbury show the viability of Central Lancashire to support major logistics options • Several local businesses report aspirations to invest in larger logistics and industrial facilities | <p>The Cuerden Strategic Site is generally accepted as the preferred location for motorway-linked logistics and, along with Samlesbury for specialist uses, the best location for the largest manufacturing requirements. Central Lancashire has a second motorway accessible employment site at EP1.3: Land to the North East of M61 junction (Gale Moss) Chorley, although the largest single building which could be accommodated here would be 27,000 sqm in size.</p> <p>The largest expansion sites of North East Preston – EP1.10: Preston East Junction 31A M6 and EP1.11: Roman Road Farm – are of a scale which supports such uses. Limitations of Motorway access at Junction 31s (no northbound slip roads) would be barriers though.</p> <p>C2: Moss Side Test Track, Leyland (Doll Lane) would be a strong secondary location in terms of the scale and quality of premises which could be offered and the critical mass of larger employers nearby. It would not be of interest to companies that need direct motorway access though, neither would Land at Lancashire/Leyland Business Parks, Farington.</p> |
| Industrial (Advanced Manufacturing) Investment | Likely up to 20,000 sqm | <ul style="list-style-type: none"> • Evidence is that the Samlesbury Enterprise Zone is attracting interest from a range of manufacturing companies, not all of which are eligible under Enterprise Zone rules. This generates overspill opportunities for the rest of the Borough • Although most local level demand does not exceed 5,000 sqm, inward investment requirements of up to 20,000 sqm are reported | <p>Walton Summit is also identified as a desirable location for larger industrial operators although there is little land to meet needs at present.</p> |

| | | | |
|--|--|--|--|
| | | by agents for the whole Central Lancashire Catchment | |
| | | <ul style="list-style-type: none">• Single transactions for up to 45,000 sqm of space have been achieved at key industrial locations such as Walton Summit | |

Source: BE Group, 2017

Employment Land Supply - Local

11.52 The total Central Lancashire Local Level Baseline Supply is 239.89 ha, located across 39 sites. This supply has been reviewed in detail and the following main issues identified:

- Great Knowley/Botany Bay, Chorley – Out of a baseline employment land supply of 26.90 ha, within a wider mixed-use policy area of 32.5 ha, current developer plans would see only 6.90 ha developed for B-Class uses. Other land is proposed for housing and an A1/A3 retail park. These plans have yet to secure planning consent, but given the constraints of the wider area, including landowner aspirations, site assembly and, in the case of EP1.1 Great Knowley at least, access, topography and bridging of the Leeds-Liverpool Canal, a scheme led by higher value uses is the most likely outcome
- Buckshaw Village, Chorley – Land around Buckshaw Avenue and Ordinance Road has seen a number of recent completions for hot food and retail uses. Allowing for these and other completions, 8.59 ha, in three sites remains in the Chorley portions of Buckshaw Village
- Land at Ackhurst Business Park, Chorley – EP1.7: Land at Ackhurst Business Park, Chorley (0.50 ha) is now held for development as a Sui Generis car showroom, specifically the relocation/expansion of the nearby Nissan showroom.
- Land east of Wigan Lane, Clayton-Le-Woods – On this extensive North Chorley site, the bulk of the development is expected to be for housing, with a net developable area of 8 ha for B-Class uses
- Site at Junction 31A M6 West Loop, Preston – EP1.6: Site at Junction 31A M6 West Loop (2.37 ha) is under development for a car showroom
- Preston East Junction 31A M6, Preston – Discussions with the Homes and Communities Agency suggest that EP1.10: Preston East Junction 31A M6 will come forward in the short-medium term. However, its estimates of the net developable area of the site are quite conservative – 7.08 ha, against the gross allocation of 25.50 ha.
- Moss Side Test Track, Leyland, South Ribble – Overall issues in South Ribble's land stock are modest. However, it is worth highlighting that issues of local opposition and infrastructure do remain barrier to delivery at C2: Moss Side Test Track, Leyland (Doll Lane).

11.53 Accounting for the above and also excluding land now developed, held to meet the needs of individual companies only, and any sub-areas within sites proposed for non B-Class uses, gives a realistic employment land supply of 175.29 ha for Central Lancashire, comprising:

- Chorley: 52.25 ha
- Preston: 70.68 ha
- South Ribble: 52.36 ha.

Employment Land Supply – Strategic

11.54 In addition to the above, South Ribble contains two strategic land allocations – the 65 ha Cuerden Strategic Site and the 72 ha Samesbury Enterprise Zone. These are strategic locations, to be marketed primarily to companies outside of South Ribble and, in the case of the Enterprise Zone, outside of Lancashire.

11.55 In Cuerden, the agreed site masterplan, currently the subject of a hybrid planning application, identifies the following B-Class Development Zones:

- A Northern Business Park of 5.725 ha fronting Lostock Lane and providing 13,000-26,000 sqm of B1(a) offices comprising flexible units of 929-3,252 sqm. The lower level of provision is comparable to past successful schemes such as Riversway, Fulwood Park, Matrix Park, Ackhurst Park and Sceptre Point. It could be delivered at some 813 sqm/year, over a 16 year timeframe, which equates to only 6 percent of the Conurbation's average annual B1(a) take up rate of up to 13,935 sqm/year. The higher rate of provision, 26,000 sqm equates to 1625 sqm/year or around 12 percent of annual B1(a) take up rates. Supporting this level of growth is challenging but by no means impossible. As was noted above, Policy-On forecast jobs growth for office sectors in South Ribble is 7,538 extra jobs requiring 89,000 sqm of additional floorspace, which would support the levels of projected supply, particularly if augmented by inward investment and some larger business relocation. As noted business requirements would usually extend up to 700 sqm each although very large transactions of 1,000-5,000 sqm are noted in the Preston Conurbation
- A Southern Employment Area of 17.64 ha focused on larger manufacturing and storage uses and providing up to 80,000 sqm of floorspace. As noted above, this would be well placed to tap into regional and national markets for

B8 logistics space on motorway linked sites, albeit with some limits on the maximum size of what could be accommodated here. It is also placed to meet more local needs for B8 space, reflecting the fact that established logistics centres in Central Lancashire such as Walton Summit and Buckshaw Village are close to capacity.

11.56 The Samlesbury Enterprise Zone has been in operation for five years now. Infrastructure has been provided and marketing is underway, with interest established but a lack of firm commitments from occupiers. To date only BAE's, ASK facility and the Wincanton Defence Logistics Centre are the only completions. Further take up is expected to proceed slowly.

11.57 A view of stakeholders is that the Enterprise Zone is of interest to manufacturing companies generally rather than just those in the aerospace sector generally. However, some are discouraged by the secure nature of the site which makes it appear that it will only cater for defence industries and the BAE supply chain. This is clearly a perception that needs to be discouraged. It is not clear if the current Enterprise Zone limitations on the business sectors which can occupy the site are proving a barrier to occupancy.

11.58 The net developable area of the Enterprise Zone is 48.56 ha, of which 35 ha falls within South Ribble. The total strategic land supply of these two sites is thus 58.37 ha.

Employment Areas

11.59 Central Lancashire's existing 111 Local Employment Areas have been appraised and graded A-E, as defined in Table 73 Collectively they provide some 920.44 ha of brownfield land in B1/B2/B8 use:

- Chorley – 36 Areas comprising 162.38 ha of active land
- Preston – 55 Areas comprising 413.46 ha of active land
- South Ribble – 20 Areas comprising 344.60 ha of active land.

Table 73 – Grades A to E Definitions

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

Source: BE Group 2017

11.60 Table 74 summarises the Employment Areas by each of the above grades. It is assumed that future growth will be focused around the 22 flagship locations (Grade A or B). Areas graded B/C and C generally represent Central Lancashire’s supply of B1/B2/B8 premises for meeting local needs. They should be protected for that use. Two areas in Preston have been identified as being ‘of concern’, in terms of the amount of vacant and derelict premises in the area – ELR No 63: Oakham Court/ Laurel Street and ELR No 64: Shepherd Street. Large areas are also being used for surface car parking and both locations could benefit from regeneration investment.

Table 74 – Employment Areas’ Appraisal by Category

| Category | Chorley, Number of Sites | Preston, Number of Sites | South Ribble, Number of Sites |
|---|--------------------------------|--------------------------------|-------------------------------------|
| <u>A and B</u> Key/ Flagship areas | 6* | 10 | 6 |
| <u>B/C and C</u> Fit-for-purpose local Employment Areas | 11 | 24 | 11 |
| <u>C/D and D</u> Lower quality in residential/rural areas | 19 | 19 | 3 |

| Category | Chorley, Number of Sites | Preston, Number of Sites | South Ribble, Number of Sites |
|---|--------------------------------|--------------------------------|-------------------------------------|
| <u>D/E and E</u> Areas of concern, requiring immediate attention or areas lost to other uses | - | 2 | - |
| TOTAL | 36 | 55 | 20 |

Source: BE Group, 2017

*The Momentum, Southern Commercial and Revolution areas of Buckshaw Village are counted separately in this exercise

11.61 It is not envisaged that large scale growth will take place at these locations, outside of the allocated employment sites. However, this study has identified a number of small scale 'regeneration opportunities' which have the potential to provide additional/alternative employment land, meet the growth needs of existing local firms or other requirements. These are detailed in Appendix 10.

Objectively Assessed Needs

11.62 There is no definitive model for forecasting future employment land need. Two 'policy off' based models have been used to assess future employment land provision. These are the projection forward of historic land take and a forecast based on employment sector change. All assessments of OAN relate to the three Central Lancashire Boroughs, individually or collectively.

11.63 In terms of a 'policy-on' model, sensitivity testing has been undertaken to understand the forecast growth, above the baseline, which results from City Deal in Preston/South Ribble and the delivery of the Cuerden Strategic Site and Samlesbury Enterprise Zones in South Ribble. There are no equivalent strategic initiatives in Chorley which permit a policy on scenario to be developed for Chorley Borough.

11.64 Take-up data was obtained for the 1991-2016 period from the three Councils. This includes both small scale historic completions and larger developments at locations such as Buckshaw Village, Lancashire Business Park, Farington and Junction 31a, Preston. Projected forward over 20 years, 2014 to 2034, the following need is identified:

- Chorley – 3.82 ha/year x 20 (years) = 76.40 ha
- Preston – 3.56 ha/year x 20 (years) = 71.20 ha
- South Ribble – 3.54 ha/year x 20 (years) = 70.80 ha.

Central Lancashire total requirement – 218.40 ha

11.65 The Boroughs should also have a buffer to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2034 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2034. A buffer of five years has been applied. Based on the historic take-up trend this would generate a further land need of 54.60 ha across Central Lancashire, and by Borough:

- Chorley – 3.82 ha/year x 5 (years) = 19.10 ha
- Preston – 3.56 ha/year x 5 (years) = 17.80 ha
- South Ribble – 3.54 ha/year x 5 (years) = 17.70 ha.

11.66 Added to the 2034 need figure, this increases the requirement as follows:

- Chorley – 76.40 ha + 19.10 ha = **95.50 ha**
- Preston – 71.20 ha + 17.80 ha = **89.00 ha**
- South Ribble – 70.80 ha + 17.70 ha = **88.50 ha.**

Central Lancashire total requirement – 273.00 ha

11.67 When measured against realistic supply, which has been backdated to 2014, it is clear that all three local authority areas have insufficient land available to meet needs to 2034 (plus a buffer). To summarise:

- Chorley – 95.50 ha (need) – 59.75 ha (realistic supply, local only, backdated) = **35.75 ha (further need)**
- Preston – 89.00 ha (need) – 71.69 ha (realistic supply, local only, backdated) = **17.31 ha (further need)**
- South Ribble – 88.50 ha (need) – 56.99 ha (realistic supply, local only) = **31.51 ha (further need).**

11.68 The baseline employment based forecasts suggest the following in terms of future employment land provision to 2034 (Table 75).

Table 75 – Baseline Employment Based Forecast 2014-2034*

| Growth Sectors | Chorley | Preston | South Ribble | Central Lancashire |
|--|----------------|----------------|---------------------|---------------------------|
| Total Floorspace, sqm | 41,205 | 22,637 | 30,806 | 85,046 |
| Divided by Development Floorspace per ha | 3,900 | | | |
| Equivalent Employment Land Needed, ha | 10.6 | 5.8 | 7.9 | 21.8 |

| Sectors in Decline | Chorley | Preston | South Ribble | Central Lancashire |
|--|----------------|----------------|---------------------|---------------------------|
| Total Floorspace, sqm | (20,938) | (47,527) | (55,016) | (113,937) |
| Divided by Development Floorspace per ha | 3,900 | | | |
| Equivalent Employment Land Reduction, ha | (5.4) | (12.2) | (14.1) | (29.2) |
| <i>Net Land Need, ha</i> | <i>5.4</i> | <i>(6.4)</i> | <i>(6.2)</i> | <i>(7.4)</i> |
| <i>Net Jobs Forecast</i> | <i>6,412</i> | <i>(808)</i> | <i>4,672</i> | <i>10,276</i> |

Source: BE Group, 2017

*Figures in brackets are negative, i.e. jobs/property/land losses

11.69 The forecasts consider baseline local jobs only and accordingly are compared against Central Lancashire's local land supply only. Against that realistic local supply (188.43 ha across Central Lancashire, backdated to 2014) both Central Lancashire as a whole, and the three individual local authority areas, has ample land to meet needs under all the scenarios.

11.70 Overall in Central Lancashire, the strongest growth will be in construction, focused in South Ribble, with a projected gain of 4,158 jobs. Human health and social work, focused in Chorley, is expected to gain another 3,035 by 2034.

11.71 The strongest growth sector is administrative and support services with 2,660 jobs forecast to be created before 2034. Only slightly smaller is the forecast growth in professional, scientific and technical activities – 2,184. The sectors anticipated to have the most significant declines in employment numbers between 2014 and 2034 in Central Lancashire are manufacturing (-2,867 jobs), public administration and defence (-2,830) and education (-536).

11.72 By Borough, the key growth sectors are:

- *Chorley* – Administrative and support services, human health and social work and professional, scientific and technical activities

- *Preston* – Administrative and support services, professional, scientific and technical activities and construction
- *South Ribble* – Construction, professional, scientific and technical and wholesale and retail trade.

Policy-On Forecasts

11.73 Success of the strategic interventions through the City Deal would mean that growth in employment, and therefore employment land demand, will be over and above the baseline demand forecast above. The two strategic sites of Central Lancashire, Cuerden and the Samlesbury, also have ambitious jobs targets associated with them. To account for this programmed growth two additional, ‘policy-on’ forecasts have been created for the two local authorities affected, Preston and South Ribble (See Table 76). The strategic initiatives do not directly affect Chorley, so no equivalent forecast is possible in that Borough.

11.74 It is assumed that South Ribble’s policy on growth would be focussed around construction, transportation and storage and manufacturing and Preston’s would be more focussed on office based support sectors (although industrial uses would still see some uplift). The uplift is assumed to be between 5 and 20 percent above baseline levels.

11.75 This policy on approach results in a net positive land demand for both Preston (11.5 ha) and South Ribble (52.9 ha). This is a change of 17.9 ha for Preston and 59.1 ha for South Ribble over the baseline forecasts. South Ribble has a much higher level of change over the baseline level due to Cuerden and Samlesbury, which are delivered within South Ribble.

Table 76 – Policy-On Employment Based Forecast 2014-2034*

| Growth Sectors | Preston | South Ribble |
|--|---------|--------------|
| Total Floorspace, sqm | 58,291 | 207,545 |
| Divided by Development Floorspace per ha | 3,900 | |
| Equivalent Employment Land Needed, ha | 14.9 | 53.2 |

| Sectors in Decline | Preston | South Ribble |
|--|----------------|---------------------|
| Total Floorspace, sqm | 13,456 | 1,369 |
| Divided by Development Floorspace per ha | 3,900 | |
| Equivalent Employment Land Reduction, ha | (3.5) | (0.4) |
| <i>Net Land Need, ha</i> | <i>11.4</i> | <i>52.8</i> |
| <i>Net Jobs Forecast</i> | <i>2,732</i> | <i>20,251</i> |

Source: BE Group, 2017

*Figures in brackets are negative, i.e. jobs/property/land losses.

Scenario Testing

11.76 The employment methods of forecasting, both policy on and policy off make no allowance for a range of practical issues such as the extent that growth in office employment takes place in town/city centre locations, at higher densities, rather than in low-density business parks. Also, that land take-up/property needs can be for different reasons such as modernisation or geographic relocation or that expansion may also be within existing premises or on expansion land not accounted for in land allocations. Past experience also suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate, and improved productivity could lead to additional need.

11.77 Therefore, to test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for two historic periods. For this analysis, just baseline (policy-off) forecasts are used as the relevant strategic initiatives had yet to be implemented during the bulk of these historic periods:

- The long-term period from 1991-2016 and compared to the actual land take-up during that period (Table 77)
- 2001-2007 which was a period of sustained economic growth nationally (Table 78).

11.78 The tables show that baseline forecasting predicted levels of land development over the last 20 years that were normally negligible compared to the levels of take-up really achieved. The trend shows that net jobs growth is not an accurate method of

calculating land, with far more land being developed than was calculated from the jobs prediction, even when sectors forecast to grow only are considered.

Table 77 – Employment Land Take-Up/Employment Change Comparison 1991-2016

Chorley

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 14,916 | 27.3 |
| Decline | (6,541) | (28.9) |
| Net growth | 8,375 | (1.6) |
| Historic land take-up | - | 95.60 |

Source: BE Group, Oxford Economics, CBC 2017

Preston

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 17,067 | 24.7 |
| Decline | (17,138) | (93.2) |
| Net growth | (71) | (68.5) |
| Historic land take-up | - | 81.98 |

Source: BE Group, Oxford Economics, PCC 2017

South Ribble

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 25,900 | 24.2 |
| Decline | (9300) | (72.1) |
| Net growth | 16,600 | (47.9) |
| Historic land take-up | - | 88.50 |

Source: BE Group, Oxford Economics, SRBC, 2017

**Table 78 – Employment Land Take-Up/Employment Change Comparison
 2001-2007**

Chorley

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 8,828 | 17.1 |
| Decline | (1,642) | (9.9) |
| Net growth | 7,186 | 7.2 |
| Historic land take-up | - | 47.23 |

Source: BE Group, Oxford Economics, CBC 2017

Preston

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 19,591 | 46.4 |
| Decline | (5,747) | (9.1) |
| Net growth | 13,844 | 37.2 |
| Historic land take-up | - | 23.55* |

Source: BE Group, Oxford Economics, PCC 2017

*There is no annual take up breakdown for the years 2001/02-2003/04, for Preston, rather monitoring provides an overall completion for 1998-2004. To allow this 2001-2007 analysis to be undertaken, the 1998-2004 take up figure of 26.99 ha has been divided evenly over those six years, to create an average take up rate of 4.50 ha/year. This has then been added to years where take up is available on an annual basis to create an indicative take up over 2001-2007 of 23.55 ha.

South Ribble

| Employment Change | Total Jobs | Land (Ha) |
|--------------------------|-------------------|------------------|
| Growth | 6900 | 1.80 |
| Decline | (2700) | (11.0) |
| Net growth | 4200 | (9.20) |
| Historic land take-up | - | 34.68 |

Source: BE Group, Oxford Economics, SRBC, 2017

11.79 A summary of the take up and policy-on/policy-off forecast scenarios, for Central Lancashire, is set out in Table 79.

Table 79 – Central Lancashire Land Forecast Models – Summary

| Local Authority | Model | A: Land Stock 2016, ha – Strategic and/or Local Supply* | B: Land Need 2014-2034, ha | C: Buffer (five years further need), ha | D: Surplus (Shortfall), ha $D=A-(B+C)$ | Assumptions |
|-----------------|---|--|--------------------------------------|---|---|---|
| Chorley | Local Take Up | 59.75 Local Supply, backdated | 76.40 | 19.10 | (35.75) | Based on historic (25 years) take-up of 3.82 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 59.75 Local Supply, backdated | +10.60 Growth +5.20 Change | +2.65 +1.30 | 1) 46.50 2) 53.25 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | - | - | - | - | - | - |
| Preston | Local Take Up | 71.69 Local Supply, backdated | 71.20 | 17.80 | (17.31) | Based on historic (23 years) take-up of 3.56 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 71.69 Local Supply, backdated | +5.80 Growth -6.40 Change | +1.45 N/A | 1) 64.44 2) 78.09 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | Employment based on adjusted stock – Policy-On Model | 71.69 Local Supply, backdated (with strategic sites in SR) | +14.90 Growth +11.50 Change | +3.73 +2.88 | 1) 53.06 2) 57.31 | Based on 1) projected growth sectors 2) projected employment change across sectors A local/strategic growth scenario |
| South Ribble | Local Take Up | 56.99 Local Supply, backdated | 70.80 | 17.70 | (31.51) | Based on historic (25 years) take-up of 3.54 ha/pa. Compares a local growth rate with a local only supply picture |
| | Employment based on adjusted stock – Policy-Off Model | 56.99 Local Supply, backdated | +7.90 Growth -6.20 Change | +1.98 N/A | 1) 47.11 2) 63.19 | Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario |
| | Employment based on adjusted stock – | 115.36 Strategic/Loca | +53.20 | +13.30 | 1) 48.86 | Based on |

| Local Authority | Model | A: Land Stock 2016, ha – Strategic and/or Local Supply* | B: Land Need 2014-2034, ha | C: Buffer (five years further need), ha | D: Surplus (Shortfall), ha $D=A-(B+C)$ | Assumptions |
|-----------------|-----------------|---|-----------------------------|---|---|---|
| | Policy-On Model | I Supply, backdated | Growth +52.90 Change | +13.23 | 2) 49.23 | 1) projected growth sectors 2) projected employment change across sectors A local/strategic growth scenario |

Source: BE Group, 2017

*Backdated land supply at 2014

11.80 The variation in the outcome figures demonstrates the uncertainty of forecasting. The outputs range from an oversupply of 80.73 ha to a shortfall of 35.75 ha, even ignoring policy-on scenarios. However, from the market assessment and reviewing the historic trends in employment change and land take up, the conclusion is that the employment based forecasts underestimate land need significantly. When a comparison of past employment change over the period 1991-2016 is made, actual land take-up is far higher than the estimate that even the growth only sectors suggest.

11.81 In conclusion, it is considered that the most appropriate forecasts are based on the historic take-up rates. Although this does not permit consideration of strategic requirements at Cuerden/Samlesbury, it does accurately measure local needs and suggests that each authority does require additional local land to 2034, against the realistic supply, comprising:

- Chorley – 35.75 ha further need
- Preston – 17.31 ha further need
- South Ribble – 31.51 ha further need.

11.82 Central Lancashire’s previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 80 applies the same proportionate split to the three Borough’s projected needs against supply, to 2034. It shows the bulk of the need is for B1(a) land, primarily in Preston and South Ribble but also with a sizable B8 logistics requirements for Chorley and South Ribble.

Table 80 – Full Need, Hectares, Split by Use Class – Strategic/Local

| Further Needs | Use Class | | | | | | Total (ha) |
|---------------------------|--------------|-------|----------------|----|--------------|----------------|--------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed | |
| Chorley | 13.52 | - | (3.02) | | 22.25 | 3.00 | 35.75 |
| Preston | 40.91 | - | (22.10) | | (1.50) | - | 17.31 |
| South Ribble | 26.49 | - | 2.38 | | 21.90 | (19.26) | 31.51 |
| Central Lancashire | 80.92 | | (22.74) | | 42.65 | (16.26) | 84.57 |

Source: CBC, PCC, SRBC, BE Group, 2017

Non B-Class Uses

11.83 Forecasting suggests that relevant non B-Class uses (retail; accommodation and food service activities; education; human health and social work activities; arts, entertainment and recreation) could provide 8,000 more jobs in Central Lancashire by 2034 – 3,600 in Chorley, 1,800 in Preston, 2,600 in South Ribble. The strongest growth prospects are:

- Chorley – Clear strength in the health sector, with jobs gains of 2,100 forecast over 2014-2014. Good growth also forecast for accommodation and food service activities, a gain of 700 jobs over the same period
- Preston – Modest improvement of extra 200-500 jobs is forecast in all sectors to 2034, apart from education. The health sector is expected to see the highest growth
- South Ribble – Expected to see the strongest gains in retail (1,100 extra jobs) and accommodation and food services (700 extra jobs).

11.84 In terms of retail, all three areas need to strengthen their comparison, and in some cases convenience offers as well as building up the evening economy. The three Councils are aware of this and both Chorley and Preston progressing regeneration plans which will enhance the leisure and, in the case of Chorley, comparison retail elements, crucially delivering two new cinemas, hot food and, in the case of Preston several new City Centre hotels.

11.85 The modest or negative growth is forecast in education, to 2034. However, this does not account for the impacts of City Deal, which will increase the number of households in Preston and South Ribble and thus increase the number of education places required. It also does not appear to reflect the strong growth prospects of UCLan which is expanding its educational facilities north of Preston City Centre.

Growth options include incubation facilities for business start-up. Central Lancashire's two further education colleges are not expected to require further premises and indeed Runshaw College is reducing its adult education operations in Chorley as a result of national level changes in educational demands and funding.

11.86 Growth in health employment, to 2034 is strongly focused in Chorley. Again, this does not account for the growing populations of Preston and South Ribble through City Deal, but does provide evidence of the need for the Digital Health facilities proposed on Euxton Lane.

11.87 A key issue, of relevance to this study, is the potential loss of Preston City Centre office accommodation to residential conversion. If current proposals are enacted in full, then the City Centre will lose around 15 percent of its stock. Further growth in city living is an aspiration of the City Council and is expected to be an ongoing feature of Preston's regeneration programmes. This will involve the loss of office and industrial stock although for the most part only in Winckley Square and (possibly) the Harris Quarter.

11.88 However, the scale and impact of such change may prove limited for several reasons:

- The bulk of the planned losses comprise former LCC facilities which never held private sector occupiers and felt to be ill suited to meeting modern business needs
- Many of the buildings readily suited for conversion have already been proposed for such a change. Generally, these comprise low grade space, which is/was poorly occupied and making limited contributions to the local economy
- Stakeholders have questioned the real scale of the city centre residential market which can be delivered in Preston, and to what degree desirable premises can be provided in office conversions as opposed to purpose built housing.

11.89 Larger buildings may be a risk if the City Centre's largest occupiers do, as has been suggested, over time relocate within Central Lancashire to seek larger and more modern accommodation. However, business consultations in Preston suggest this will be a longer term issue.

11.90 Elsewhere the issue is with employment land lost to alternative uses. The largest proposed losses at present are at Botany Bay/Great Knowley where the whole of

EP1.2: Botany Bay, Chorley is proposed for a retail park. Other land in this area is proposed for housing. Known plans for non B-Class uses are accounted for in land supply calculations in Section 10.0.

11.91 Uses that may be located on active employment land are likely to include gyms, small scale medical and veterinary clinics, petrol filling stations and food outlets. Clearly losses of B1/B2/B8 land to other uses are an ongoing issue in Central Lancashire although it is difficult to estimate the full scale of loss which could occur to 2034. Accounting for such losses is one of the reasons why a five-year buffer of additional take up is applied to needs calculations, as described above.

12.0 RECOMMENDATIONS

12.1 This section sets out the consultants' recommendations arising from the Employment Land Study. The recommendations in this report have had full regard to the requirements of the NPPF to encourage and deliver growth through the planning system. It updates previous Employment Land Studies in the three Boroughs.

Employment Land Supply

Recommendation 1 – Employment Land Provision Definition

12.2 The NPPF does not define employment land provision within the main document. However, Annex 2 defines economic development as *“development, including those uses within the B use classes, public and community uses, and main town centre uses (but excluding housing development)”*.

12.3 For the purpose of this study, the current available local land supply in Central Lancashire is defined as 31 sites, comprising 175.29 ha split:

- Chorley: 52.25 ha in 14 sites
- Preston: 70.68 ha in 10 sites
- South Ribble: 52.36 ha in 7 sites.

12.4 Employment land site proformas for the 31 sites are included within Appendices 5, 6 and 7. In addition, South Ribble contains two further land allocations, which offer 58.37 ha – The Cuerden Strategic Site and Samlesbury Enterprise Zone. These are strategic in the sense they will be primarily be marketed to businesses from outside Central Lancashire, although realistically Cuerden will provide some competition to local employment locations. Thus, the strategic supply (58.37 ha) is distinguished from the local (175.29 ha) in terms of its capacity to meet local needs.

12.5 For the purposes of consistency between need and supply, from 2014, the two years take up 2014/15 and 2015/16 (13.14 ha) is included in supply calculations. However, this backdated land does not comprise land still available.

Recommendation 2 – Employment Areas to be Retained

- 12.6 The NPPF provides the opportunity for the three Councils to identify ‘key employment sites’ that are considered to significantly contribute to Central Lancashire’s land supply for B-Class uses. It enables these to be safeguarded for B-Class uses and other employment uses which achieve economic enhancement without detrimental impact to either the site or the wider area. This was reflected in *‘Policy 10: Employment Premises and Sites’* of the Central Lancashire Core Strategy which sought to protect existing employment premises and sites for employment uses, particularly the ‘Best Urban’ and ‘Good Urban’ sites, as defined in the 2009 Employment Land Review. It is also reflected in some Local Plan policies in Central Lancashire.

Key/Best Urban Sites and Recommendations

- 12.7 This Study has undertaken a new and independent grading of Employment Areas in Central Lancashire. From this, the following locations are above average in quality and could be designated as ‘key’ or ‘Best Urban’ sites:

Chorley

- Common Bank Area, Chorley
- Ackhurst Business Park, Chorley
- Chorley Business and Technology Park, Euxton
- Momentum/Southern Commercial Area/Revolution, Buckshaw Village

Preston

- ELR No 1: Millennium Business Park
- ELR No 7: Preston East Employment Area
- ELR No 19: Mondiboard, Longridge Road
- ELR No 27: Bow Lane
- ELR No 28: Riversway A – Portway / West Strand
- ELR No 30: North Preston Employment Area
- ELR No 54: Winckley Square / Chapel Street
- ELR No 65: Winckley Square (SW) / East Cliff
- ELR No 66: Winckley Square (South and East) / Cross Street
- ELR No 84: West Strand / Marsh Lane.

South Ribble

- Emp. Area 2: Sceptre Way, Bamber Bridge
- Emp. Area 3: Walton Summit Employment Area
- Emp. Area 8: Aston Moss, Leyland
- Emp. Area 10: Lancashire (Enterprises) Business Park, Farington
- Emp. Area 11: Moss Side Employment Area, Leyland
- Emp. Area 18: Matrix Park, Buckshaw Village.

12.8 At the strategic level, the Samlesbury Enterprise Zone and BAE facility, plus the Cuerden Strategic Site, when delivered, could also be included in this list.

12.9 Within these areas, only applications for B-Class use should generally be permitted. Non-B Class uses should only be allowed if unless strongly justified and it is proved that the proposals will not have a significant adverse impact on surrounding local uses. It is accepted that on rare occasions some exceptions may have to be made, for example to provide for complimentary services, or where a site such a Cuerden is established for a mix of uses. Other circumstances which might justify such a change, could include:

- Delivery of a broader strategy of economic development or urban regeneration
- If the alternative use delivers significant community and/or employment/skills value compared to uses already present
- If the Local Authority Area lacks dedicated high quality locations for uses such as trade/motor trade, and there are no viable alternative sites

12.10 General retail/hot food uses should not normally be supported on the Best Urban Employment Areas unless strongly justified, ancillary to the main B-Class uses and clearly intended to serve the business community in the Employment Area. Where alternative uses are considered, the general priority should be linked uses such as car showrooms, tyre and exhaust centres, or trade counters, providing the employment areas have good access to a range of sustainable transport options.

12.11 Where non-B Class uses are proposed for, or within, Best Urban Employment Areas then the Councils should require the applicants to demonstrate that:

- The site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and

- The site/premises have been proactively marketed for employment purposes for a reasonable period of time (a minimum of twelve months) at a reasonable market rate (i.e. rent or capital value) as supported through a documented formal marketing strategy and campaign, or
- As discussed above, there will be a significant community and/or economic benefit which outweighs the impact of losing the employment site/premises.

B/C-D Graded Employment Areas

12.12 For the Employment Areas graded B/C-D, a more flexible approach could be taken to help facilitate a broad range of economic development, which is vital for the future sustainability and development of the local area's economy. In some cases, the size, location and characteristics of a site may mean that a development for non-B Class uses could provide greater benefit to the local community, in terms of addressing local needs, than if the site was retained solely in B1/B2/B8 employment use.

12.13 The three Councils should also recognise the increasing level of precedents of non-B use employment activity provision within employment areas across the UK. This means uses which fall outside the B1, B2, B8 categories but which still generate permanent jobs. Such uses include sui generis uses, such as vets' practices, and D1 non-residential institutions including training centres, nurseries/children's play facilities and activity centres. Such applications within the Borough should be treated on their individual merits, including employment outputs, but should be restricted to the Employment Areas graded B/C to D.

D/E or E Graded Employment Areas

12.14 For the two areas graded D/E and E in Preston, there is a more urgent need for change, and ultimately these low-quality locations may no longer be viable for retention as B-Class employment locations. In this regard, it is noted that ELR No 63: Oakham Court/ Laurel Street and ELR No 64: Shepherd Street fall in the Stoneygate City Centre Regeneration Area and parts of Shepherd Street at least are within Housing Site SP4.4, as shown in the City Centre Plan (2016).

Housing in Employment Areas

12.15 Housing is excluded from the above advice, for all grades of Employment Area, as a change of use to C3 dwelling houses means the loss of that site for any permanent employment generating use, B-Class or non B-Class. Change of use to housing thus

represents a more significant alteration. While there may be external factors, such as shortfalls in local housing supply as well as prior approval regulations for office/industrial properties, which encourage housing development on land allocated for B-Class uses, redevelopment of all/part of an Employment Area which is in active use by local businesses should not normally be accepted.

Other Employment Locations

- 12.16 This study has reviewed the main Employment Areas of Central Lancashire, but there will be further locations in B-Class use which sit outside the defined Employment Areas, and have not been reviewed by this study. This will include solus sites occupied by single businesses.
- 12.17 Such locations can be home to key local employers and should be retained for B-Class use, wherever possible. In making applications for change of use it is for the applicant to demonstrate that the current use is no longer viable on site and that the new use would provide important community and/or regeneration benefits with no significant loss of jobs, potential jobs. Also, that the proposed mix of uses accords with other planning policies.
- 12.18 In testing whether the current B-Class use is commercially viable or not, the applicant could be asked to apply the same criteria as noted in Paragraph 12.11 above.
- 12.19 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed-use developments inappropriate on particular employment areas. It is clearly for the three Councils to judge proposals on their merits taking account of these factors.

Recommendation 3 – Sites Not Deliverable for Primarily B-Class Schemes

- 12.20 In Section 10.0 Central Lancashire's baseline land supply was reviewed in detail. The research identified several employment sites which do not appear to be viable and deliverable for B1/B2/B8 uses, or have significantly reduced net developable areas for B-Class use. The affected land should not be counted as part of the local or Central Lancashire supply of employment land in future monitoring or included in any Local Plan allocations for B-Class uses.
- 12.21 In Chorley, whatever decisions are made on the current planning applications, it remains highly unlikely that the full 26.90 ha of employment land is available in the

three sites of the Great Knowley/Botany Bay area, Junction 8, M61. EP1.1 Great Knowley in particular, is heavily constrained, both in physical terms and in terms of ownerships. A review of this broader policy area is required to clarify the realistic land supply which can be taken forward for the rest of the Local Plan period.

Recommendation 4 – Future Employment Land Provision

12.22 The identified realistic Central Lancashire land supply of 175.29 ha, at 31st March 2016, is not sufficient to meet needs over the period 2014-2034 even when backdated to 2014 (188.43 ha). Based on the Local Take Up rate the shortfall is 84.57 ha.

12.23 The forecasts of industry sector activity (jobs), suggest a degree of surplus, even under policy on scenarios for Preston and South Ribble.

12.24 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision up to 2034. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Other issues include:

- That within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
- That there will be local market churn
- That there will be need to maintain a choice of supply by size, type, location and quality of sites and premises for businesses at differing levels of their maturity
- That there should be a continuing forward supply to accommodate site development beyond 2034
- The level and nature of the existing employment land supply at 31st March 2016.

12.25 It is therefore recommended that Chorley Borough Council, Preston City Council and South Ribble Borough Council, collectively and individually, use the roll forward of historic take-up as the main measure of future land need for the period up to 2034. This indicates a Central Lancashire need of 273.00 ha to 2034, incorporating a five-year buffer. Measured against Central Lancashire's current realistic supply, backdated to 2014, there is a shortfall of 84.57 ha comprising:

- **Chorley – 35.75 ha (further need)**
- **Preston –17.31 ha (further need)**
- **South Ribble – 31.51 ha (further need).**

12.26 Central Lancashire’s previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 81 applies the same proportionate split to the three Borough’s projected needs against supply, to 2034. It shows the bulk of the need is for B1(a) land, primarily in Preston and South Ribble but also with a sizable B8 logistics requirements for Chorley and South Ribble. By this measure at least, only South Ribble needs land specifically for B1(c)/B2 industrial uses.

Table 81 – Full Need, Hectares, Split by Use Class – Strategic/Local

| Further Needs | Use Class | | | | | | Total (ha) |
|---------------------------|--------------|-------|----------------|----|--------------|----------------|--------------|
| | B1(a) | B1(b) | B1(c) | B2 | B8 | Mixed | |
| Chorley | 13.52 | - | (3.02) | | 22.25 | 3.00 | 35.75 |
| Preston | 40.91 | - | (22.10) | | (1.50) | - | 17.31 |
| South Ribble | 26.49 | - | 2.38 | | 21.90 | (19.26) | 31.51 |
| Central Lancashire | 80.92 | | (22.74) | | 42.65 | (16.26) | 84.57 |

Source: CBC, PCC, SRBC, BE Group, 2017

12.27 However, in reality, modern companies frequently require a mix of office, industrial and storage space, tailored to their individual needs. Also, while this exercise says that little industrial land is needed, market research says that companies still want B1(c) and B2 options, with South Ribble seeing speculative development of light industrial space over the last two years. The full range of needs which may emerge cannot be predicted in advance and indeed the requirements of companies change as they grow. Demand from different sectors will also fluctuate over the lifetime of the Local Plans. Thus, policy should avoid proscriptions on what B-Class uses can or cannot locate on employment sites allocated in Local Plans, unless there are specific environmental reasons for excluding some uses, such as the proximity of land to housing.

Recommendation 5 – Protecting Key Local Plan Employment Sites

12.28 The needs calculations above show that all three Boroughs have a land shortfall to 2034. This shortfall is exacerbated by the fact that some key local sites may not deliver the quantities of employment land currently envisaged in Local Plan policy.

Given the low, and reducing, land supply against need, there is a strong incentive to protect the remaining employment sites for B1/B2/B8 uses.

12.29 Protection of the remaining employment land for B1/B2/B8 development, particularly key sites and defined employment areas, needs to be considered a policy priority. Further losses in the land supply, to alternative uses, should be resisted.

Recommendation 6 – Meeting Needs

12.30 A need of 84.57 ha above current supply levels is identified, comprising:

- Chorley – 35.75 ha further need
- Preston – 17.31 ha further need
- South Ribble – 31.51 ha further need.

12.31 Thus, there is a need for some further land provision in all three local authority areas, and particularly Chorley and South Ribble. This study has not been asked to identify specific new employment sites, but some points to note in identifying land options are:

Chorley

- Delivery of Land at Great Knowley/Botany Bay has been inhibited by physical constraints and issues of multiple ownership rather than a lack of demand. Clearly if less constrained sites can be found with M61 access they should be considered as options to meet needs. It is accepted that other land around Junction 8, M61 is protected by Green Belt and Other Open Countryside/Open Space designations, however. The nearest potential site might be BNE3.1 East of M61, Chorley although this is Safeguarded for Future Development Needs, beyond the Local Plan period by Plan policy BNE3.
- Away from the motorway, stakeholders highlight Buckshaw Village (also noted for South Ribble) as a focus of demand for both office and industrial uses, along with the adjacent Euxton Lane Corridor, which is now home to a diverse group of high value occupiers. Growth options that could continue what has been achieved, and what has still to be achieved at EP1.5: Euxton Lane, Chorley are desirable

- Further regeneration opportunities in Chorley Town Centre should also be reviewed although stakeholders remain sceptical of the prospects for B1(a) office delivery here

Preston

- The additional requirements for Preston are more modest. With this in mind, it is important to note that the HCA have been quite conservative in its estimates of the net developable area of some of its holdings in North East Preston. It is possible that recalculation may remove much of this 14-15 ha further need
- Otherwise North East Preston, remains a focus for market interest from the industrial and warehouse sectors although infrastructure and access constraints mean that it will struggle to compete with the Cuerden Strategic Site for the largest logistics and manufacturing operations
- In terms of offices, Cuerden is also likely to meet a lot of larger requirements for the Preston Conurbation. Further office options in Preston City Centre and/or Preston Docks would be desirable, both to meet local needs and attract inward investment. However, such allocations here may prove difficult to realise in the present market and difficult to justify as owners seek to rationalise existing City Centre stock rather than expand it. Regeneration programmes which do include offices, likely as part of a mix of uses, would be welcome.

South Ribble

- Market evidence is that the focus of both demand and recent development activity is the A6/A582 Corridor of Bamber Bridge and Cuerden. While the Cuerden Strategic Site will meet the largest needs, and most office requirements, the stock of local industrial/warehouse land in this area is modest. Stakeholders regularly sited the lack of opportunity sites at Walton Summit, an industrial estate of regional significance.
- Buckshaw Village is now established as a key market focus in Central Lancashire, home to a range of major occupiers and with a diverse property offer. Options to maintain the momentum generated here, in both the Chorley and South Ribble parts of the Village, would be welcome
- Conversely there is a large remaining land supply in Leyland/Farlington which looks likely to last for much of the period to 2034.

Recommendation 7 – Encouraging Development

- 12.32 Evidence is that smaller light industrial space can be viably developed on appropriate sites, without external support. Smaller office suites are also being provided for, at EP1.5: Euxton Lane, Chorley and elsewhere, primarily through sub-division/refurbishment of existing buildings rather than new development. At the opposite end of the scale, plans are underway for the delivery of the Cuerden Site to meet the largest local/strategic needs. In Chorley, at least some larger development is likely on EP1.3: Land to the North East of M61 junction (Gale Moss) Chorley in a realistic timeframe. Several HCA owned sites are also likely to deliver both small and large options within a 5-year period.
- 12.33 If there is market failure therefore, it is likely to be at the mid-range for industrial and office space, space that allows local businesses to grow and particularly meet the aspirations for owner occupation noted.
- 12.34 There is no one way to encourage development, each site has different needs and the desire and ability of public sector actors to intervene will vary. The simplest method is to maintain flexibility over the mix of uses to allow viable combinations to be identified, although this can sacrifice land supply and conflict with other policies. A range of commonly used support methods is outlined in Table 82 which are applicable to development matters in Central Lancashire.

Table 82 – Delivery Mechanisms

| Mechanism | Description |
|--|--|
| Private Sector Led/Private Sector Funded | Assumes a development is financially viable and has a willing developer. Public sector input will be limited to positive engagement by planning and economic development officers, to ensure a smooth delivery of the relevant property mix. |
| Revised Development Mix | Assumes a development viability gap, but no direct public sector intervention. Rather council officers and the developer negotiate a revised development mix which includes a stronger element of higher value uses to offset the gap. This does not automatically mean housing but could include retail or leisure uses, appropriate to the location, which can also improve values. Pubs/restaurants, a gym or hotel are examples of uses that both generate reasonable returns for developers and can improve the offer and attractiveness of a business park scheme. |
| Low Level Public Support | Public sector support does not always mean large scale investment. Sometimes a landowner may simply be unaware of the full potential of his site, level of market demand or how site constraints can be overcome. An increasingly common approach therefore is for local authorities to assume some of the initial research costs, producing for example a planning brief or masterplan to show the owner/developer what is possible and prompt |

| Mechanism | Description |
|-------------------------------|---|
| | development. Support on site/area marketing may also be welcome. |
| Acquisition | Council buys the land to undertake direct development or in partnership. |
| Joint Venture Agreement | <p>A defined agreement between public sector agencies and private developer partners. It is most commonly used where land is, at least in part, owned by the public sector. The public sector can then support development by inputting the land at low or nil value or by seeking out infrastructure funding.</p> <p>Such a Joint Venture partnership can take a number of forms:</p> <ul style="list-style-type: none"> • Contractual Partnership – Normally a short term arrangement where the parties enter into a contractual arrangement where one party, usually the developer, will deliver. It would relate to the most straightforward developments. • Joint Venture through formation of a limited company formed through share issue - A common arrangement where each party will put in an element of cost and risk, and the return reflects the share. The council may put in land and/or capital, the developer will often meet development costs. The arrangement may see proceeds distributed in different ways. This could be a revenue share, or a share on sale of the investment. The party taking the greater level of risk will normally have first call on the profit. • Company limited by guarantee – Tends to be more for non-profit making arrangements, and can introduce a number of partners to the company. This arrangement is more likely to be suitable for marketing and promotion of regeneration schemes rather than a Joint Venture to deliver development. |
| Direct Public Support | This may be in the form of direct development funding or funding infrastructure. It may also be through rental guarantees or other forms of security. |
| Annuity Rent | This is also increasingly used to support investments by pension funds and other major financial institutions into developments. The institution will fund the development in exchange for a lease of circa 35 years and an annuity rent paid by a secure covenant such as the council acting as developer. This would be a low but secured rent over the time period with agreed uplifts. The developer can then sub-let at market value to obtain a profitable rent. At the end of the 35 years the property will revert to the developer for £1 and the developer retains the long term asset value. |
| Revolving Infrastructure Fund | A method for paying for supporting infrastructure development on sites with otherwise good development potential. The public sector may use a range of funding such as prudential borrowing to provide funds in exchange for a long term payback of Business Rates, land receipts or associated income uplift. Where development is BREEAM Excellent, 100% of business rate levied can now be retained by the borrowing agency. |

Source: BE Group, 2017

Recommendation 8 – Monitoring Arrangements

12.35 This study has relied on data on past employment take up data as its preferred method of forward forecasting. It is important to acknowledge that some gaps were identified in the data received from the three Councils, including two years take up

from Preston, 2010/11 and 2011/12, and a comprehensive split of Preston's take up by use class (see Section 8.0).

12.36 Moving forward, as Chorley, Preston and South Ribble increasingly seek to work together on planning matters, and assuming that future evidence base documents will need to rely on take-up data, all three authorities will need to institute strong and consistent monitoring of land completions. This study has not reviewed the monitoring procedures of the three Councils in detail, but the following is recommended to guide an overall approach to monitoring:

- That all frontline personnel involved in logging received planning applications, and monitoring their progress and revisions, be made aware of the importance of the information entered, in terms of the contribution to the evidence base. If monitoring is undertaken by planning policy personnel then a system should be set up, so they receive a weekly report from Development Control on relevant applications, received, revised, approved or refused
- That the site areas and floorspace gain of all approved planning applications, of all types of development, be recorded to a common database by frontline personnel. It is recommended that site areas be calculated from GIS software rather than the areas stated in application forms as the latter is not always accurate, e.g. an applicant may include a whole industrial site of 1 ha in the red line boundary, even when they are only applying for a small 100 sqm extension on one part of that site
- The PPG note '*Housing and Economic Land Availability Assessment*' suggests that Employment Land Studies should not consider sites of less than 0.25 ha or 500 sqm of floorspace. However, it is not recommended that equivalent minimum (or maximum) limits be placed on monitoring. Monitoring needs to capture the full range of development in each Local Authority Area to provide an accurate record of change. Many completions will be small scale, particularly in dense urban areas such as Preston and in rural parts of Central Lancashire
- Seek to clarify development levels (land and floorspace) by use class as much as possible, particularly in Reserved Matters Applications. Avoid simply recording consents as 'mixed-B1, B2, B8'
- Floorspace change above ground floor level represents a gain in floorspace but not employment land, as the site becomes mixed-use rather than definitively in B-Class use. Monitoring should reflect this distinction

- Record the site areas/floorspaces of land/property lost to other uses to allow net annual take up figures to be compiled. This should include the loss of office, light industrial, etc. space through Permitted Development Rights, to provide a full picture of area/floorspace gain/loss locally, for calculation of net annual change. This last point is likely to be particularly relevant in Preston, where Permitted Development changes will be a key element of overall floorspace change, especially in the City Centre
- Changes of use between the B-Use Classes, i.e., industrial to offices, should not be recorded as land gains
- Record details of applicants/agents to assist in future monitoring of site status
- Record the number of jobs proposed in applications to provide a measure of the jobs growth potential of ongoing development. Such data could have a range of uses where Councils need to know how employment is growing in their Boroughs. Comparing jobs to floorspace also allows a real world understanding of local jobs densities
- Other useful data which could be recorded might include parking provision to see if parking standards are being met, the greenfield/brownfield status of the site.

12.37 If not already done, starts and completions should be monitored through Building Control records, updating the above monitoring as required. Normally these would be combined with annual/twice yearly site visits to check completions. The expiry date of consents should be recorded so that expired planning permissions where no work has started can be excluded from monitoring at the right time. The end result would be an annual Employment Land Monitoring Report, covering the datasets mentioned above, produced in a format which remains consistent on a year on year basis. This should provide an updated position on local and strategic employment sites.

Recommendation 9 – Future Reviews

12.38 This report has shown how market conditions in Central Lancashire are evolving, with a business base seeking growth and increased prospects of inward investment. This is combined with greater prospects of delivery on some strategic and local employment sites and ongoing deliverability issues on others. In view of these factors, the three Councils of Central Lancashire should review their employment land portfolios, individually and collectively, as appropriate at intervals of around five

years. This is also in accordance with the NPPF which recommends regular monitoring and review of the local land supply to ensure a robust evidence base.

Recommendation 10 – Maintain Awareness of External Influences

- 12.39 As a first point, the local authorities of Central Lancashire must recognise their joint role, together with their neighbours, in developing the economy of its FEMA. In this respect, they are interconnected, to varying degrees, on several levels.
- 12.40 There are clear links between Central Lancashire and Pennine Lancashire, including the Enterprise Zone shared between South Ribble and Ribble Valley. The Cuerden Strategic Site will have influence along the M65 Corridor. Central Lancashire also has connections with Wigan and particularly Bolton, home of the Cutacre logistics development, a likely strong competitor with Cuerden. Similar competition is likely between Cuerden and sites in Skelmersdale, West Lancashire. On the Fylde Coast there are clear service sector linkages along the M55 Corridor, between Whitehills and Preston, while proposed uses at Blackpool Airport Enterprise Zone (as well as Warton) will overlap to a degree with Samlesbury. Accordingly, a high level of joint working between these authorities and the three Councils of Central Lancashire is advisable and should be continued.

Appendix 1 – List of Consultees

| | |
|---|---|
| Alfa Travel | Lancashire County Council |
| Anderton Parish Council | Lancashire Local Enterprise Partnership |
| Anheuser-Busch InBev UK (Samlesbury Brewery) | Leyland Rubber Components/Dexine |
| BAE Systems | Leyland Rubber Technology |
| Barnfield Construction | Little Hoole Parish Council |
| Baxi Heating (UK) | Lunar Caravans |
| Blackburn with Darwen Borough Council | Mason Owen |
| Blackpool Council | Muse Developments |
| Bolton Metropolitan Borough Council | North West Automotive Alliance |
| Bretherton Parish Council | Northern Trust |
| C and W Berry | Orbit Developments |
| Chorley and South Ribble Clinical Commissioning Group | Orvia Properties |
| Chorley Borough Council | Parker and Company |
| Community Gateway Association | Parker Barras |
| Countrywide Assured/Chesnara | Penwortham Town Council |
| Coupe Foundry/Shakespeare (Preston) Foundry | Places for People |
| Crystal Hurstwood | Preston City Council |
| Edenbrace | Preston College |
| Engineering Employers Federation | Production Glassfibre |
| Eric Wright Group/Maple Grove | Property Capital |
| Errigal Developments/Errigal Investments | Ribble Valley Borough Council |
| Expac (Preston) | Roach Bridge Tissues |
| Fylde Borough Council | Roundhouse Properties |
| GA Pet Foods | Runshaw College |
| Grimsargh Parish Council | Ruttle Plan Hire |
| Hansteen | Seddon Developments |
| Harworth Group | South Ribble Borough Council |
| HDAK | Taylor Weaver |
| Hindley Lawrence | Telent Technology Services |
| Homes and Communities Agency | Third Way Commonwealth |
| Homeserve | Truebearing |
| Ingol & Tanterton Neighbourhood Council | Tustin Developments |
| | TVS Supply Chain Solutions |
| | Tyrers Coaches |
| | Ultimaker GB |
| | University of Central Lancashire |

| | |
|----------------------------------|---------------------------------|
| Waitrose | Whittle Jones |
| West Lancashire District Council | Whittle-le-Woods Parish Council |
| Whittingham Parish Council | Wigan Council |
| Woodplumpton Parish Council | Wyre Borough Council |

NB. In addition to the above, questionnaire surveys were issued to 800 companies

Appendix 2 – Business Survey Questionnaire

Chorley, South Ribble and Preston Councils Central Lancashire Employment Land Study 2017

Company Details

| | |
|--------------------------|--|
| Company Name | |
| Contact Name | |
| Position | |
| Address | |
| Email Address | |
| Tel No | |
| Business Activity | |

Employees

1. Number of: **full-time** employees _____ and/or **part-time** employees _____

Current Accommodation

2. Type of accommodation (please tick main type/use)

| | | | | | |
|-----------------------|--------------------------|-----------------|--------------------------|-------------------------|--------------------------|
| Office | <input type="checkbox"/> | Serviced office | <input type="checkbox"/> | High-tech/lab | <input type="checkbox"/> |
| Industrial/factory | <input type="checkbox"/> | Warehouse | <input type="checkbox"/> | Site (undeveloped land) | <input type="checkbox"/> |
| Other (specify) _____ | <input type="checkbox"/> | | | | |

3. Is the property:

Owned Rented

4. If rented, what is the length of your current lease? ____ When is the next lease break? ____

5. Size of unit: (Interviewer to confirm correct units – sqm or sqft)

| | | | | | |
|--------------------------------------|--------------------------|---|--------------------------|---|--------------------------|
| 0-100 sqm (0-1,076 sqft) | <input type="checkbox"/> | 101-200 sqm (1,077-2,152 sqft) | <input type="checkbox"/> | 201-500 sqm (2,153-5,382 sqft) | <input type="checkbox"/> |
| 501-1,000 sqm (5,383-10,764 sqft) | <input type="checkbox"/> | 1,001-2,000 sqm (10,765-21,529 sqft) | <input type="checkbox"/> | 2,001-5,000 sqm (21,530-53,821 sqft) | <input type="checkbox"/> |

5,001-10,000 sqm

Larger, sqm _____

Site size, hectares/acres _____

6. How long has the business been in your current premises? Years ____ Months ____

7. Where was the previous location of the business?

Elsewhere in same industrial estate/ business park/town centre as current premises

Elsewhere in same town (please specify) _____

Other (please specify) _____

No previous location

(current site is first business site)

Current Location

8. What are the key reasons for locating your business at your current location?
 (Tick all that apply and Interviewer to prompt for most important factor and highlight):

| | | | |
|------------------------------|--------------------------|--------------------------------|--------------------------|
| Close to owners/staff homes | <input type="checkbox"/> | Available space | <input type="checkbox"/> |
| Close to customers | <input type="checkbox"/> | Close to suppliers | <input type="checkbox"/> |
| Close to Motorways | <input type="checkbox"/> | Proximity to Manchester | <input type="checkbox"/> |
| Near to town centre services | <input type="checkbox"/> | Central position within region | <input type="checkbox"/> |
| Reputation/profile of area | <input type="checkbox"/> | Adequate car parking | <input type="checkbox"/> |
| Always been in same location | <input type="checkbox"/> | Affordability | <input type="checkbox"/> |
| Other (please specify): | _____ | | |

9. What are the main disadvantages of locating your business at your current location?
 (Tick all that apply and Interviewer to prompt for most important factor and highlight):

| | | | |
|-----------------------------|--------------------------|---------------------------------|--------------------------|
| Too crowded/over-developed | <input type="checkbox"/> | Commuting times | <input type="checkbox"/> |
| Difficulty attracting staff | <input type="checkbox"/> | Distance from suppliers/markets | <input type="checkbox"/> |
| Lack of quality premises | <input type="checkbox"/> | Expensive | <input type="checkbox"/> |
| Lack of car parking | <input type="checkbox"/> | Lack of facilities/services | <input type="checkbox"/> |
| Poor image | <input type="checkbox"/> | Lack of public transport | <input type="checkbox"/> |
| Road Congestion | <input type="checkbox"/> | No disadvantages | <input type="checkbox"/> |
| Other (please specify): | _____ | | |

Business Confidence

10. How confident are you about business performance? (Select one only)

| | Much stronger | Slightly stronger | About the same | Slightly weaker | Much weaker |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| How has your business performed over the last 12 months compared to the 12 months before that? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| How do you expect your business will perform in the next 12 months compared to the last 12 months? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

11. Regarding your business, how do you expect the following to change over the next 12 months?
 (Select one for each row)

| | Significant increase | Slight increase | No change | Slight decrease | Significant decrease |
|--------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Employee numbers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sales | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Profitability | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Operating costs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Capital investment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Demand for skills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Supply of skills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Future Accommodation

12. Are you considering moving premises within the next:
12 months? Yes No 2-3 years? Yes No

If yes to either of the above, please respond to questions 13a – 13g, otherwise go directly to question 14.

Future Requirements

- 13a. What type of accommodation will you be looking for? (please tick main type/use)
- | | | | | | |
|-----------|--------------------------|---------------|--------------------------|-----------------|--------------------------|
| Office | <input type="checkbox"/> | Industrial | <input type="checkbox"/> | Serviced office | <input type="checkbox"/> |
| Warehouse | <input type="checkbox"/> | High-tech/Lab | <input type="checkbox"/> | Land | <input type="checkbox"/> |
- 13b. Tenure required?
- | | | | | | |
|----------|--------------------------|-----------|--------------------------|---------------|--------------------------|
| Freehold | <input type="checkbox"/> | Leasehold | <input type="checkbox"/> | No Preference | <input type="checkbox"/> |
|----------|--------------------------|-----------|--------------------------|---------------|--------------------------|
- 13c. Will this be **additional** or **replacement** to existing property?
- 13d. What size of unit/site will you be looking for? (Interviewer to confirm correct units – sqm/sqft)
- | | | | | | |
|--------------------------------------|--------------------------|---|--------------------------|---|--------------------------|
| 0-100 sqm (0-1,076 sqft) | <input type="checkbox"/> | 101-200 sqm (1,077-2,152 sqft) | <input type="checkbox"/> | 201-500 sqm (2,153-5,382 sqft) | <input type="checkbox"/> |
| 501-1,000 sqm (5,383-10,764 sqft) | <input type="checkbox"/> | 1,001-2,000 sqm (10,765-21,529 sqft) | <input type="checkbox"/> | 2,001-5,000 sqm (21,530-53,821 sqft) | <input type="checkbox"/> |
- Larger, sqm _____
Site size, hectares/acres _____
- 13e. Location type preferred:
- | | | | |
|-------------------|--------------------------|---------------|--------------------------|
| Industrial Estate | <input type="checkbox"/> | Business Park | <input type="checkbox"/> |
| Town Centre | <input type="checkbox"/> | Rural | <input type="checkbox"/> |
- 13f. General location – please indicate preferred area below:
- Same industrial estate/business park/ town centre?
- Elsewhere in same town (please specify) _____
- Other (please specify): _____
- 13g. What are the main reason(s) for needing to find new premises? (tick all that apply)
- | | | | | | |
|-------------------------|--------------------------|---------------------------|--------------------------|-------------------|--------------------------|
| Current site too small | <input type="checkbox"/> | Cost | <input type="checkbox"/> | Upgrading quality | <input type="checkbox"/> |
| Current site too large | <input type="checkbox"/> | Current site too old | <input type="checkbox"/> | Lease running out | <input type="checkbox"/> |
| To be closer to markets | <input type="checkbox"/> | To be closer to suppliers | <input type="checkbox"/> | | |
- Other (please specify): _____

Additional Comments

14. If you have any additional comments regarding commercial premises, please use the space below.

Topics might include:

- Road Infrastructure
- Business support
- Planning issues
- Public transport
- Funding availability
- Staff availability
- Property availability

Please indicate if you are happy to be contacted for further research YES / NO

Question for South Ribble only: Would you like more information on business support?

(Please call 01772 625567 or email info@businessinsouthribble.com)

Thank you for your assistance.
All responses will be treated in confidence.

Appendix 3 – Business Survey Responses by Sub-Area

Table A3.1 – Chorley

| | No Achieved | No. Required |
|---|-------------|--------------|
| Chorley (Including Buckshaw Village) | 133 | 108 |
| Euxton | 19 | 18 |
| Coppull | 25 | 15 |
| Rural West (e.g. Eccleston, Croston, Bretherton, Mawdesley, Charnock Richard) | 32 | 35 |
| Adlington | 25 | 23 |
| North (e.g. Whittle-le-Woods, Heapey, Clayton-Le-Woods, Clayton Green, Clayton Brook) | 6 | 40 |
| Rural East/North East (Brindle, Rivington, Brinscall, Abbey Village, Hoghton) | 10 | 13 |
| Total | 250 | 250 |

Source: BE Group, 2017

Table A3.2 – Preston

| | No Achieved | No. Required |
|---|-------------|--------------|
| Rural North, West of M6 | 10 | 12 |
| Rural North, East of M6 | 16 | 9 |
| City North East (J31(a), Sharoe Green, Fullwood, Deepdale etc.) | 68 | 75 |
| City South East (Ribbleton, Fishwick, Frenchwood) | 46 | 78 |
| City North West (Ingol, Plungington, etc.) | 45 | 45 |
| West (Ashton and surrounding rural area) | 63 | 33 |
| Preston Central | 52 | 48 |
| Total | 300 | 300 |

Source: BE Group, 2017

Table A3.2 – South Ribble

| | No Achieved | No. Required |
|---|-------------|--------------|
| Bamber Bridge/Cuerden | 51 | 54 |
| Leyland/Farington (Including Moss Side) | 138 | 120 |
| Lostock Hall | 14 | 15 |
| Penwortham | 34 | 48 |
| Rural West (e.g. New Longton, Longton, Hutton, Walmer Bridge, Much Hoole) | 33 | 33 |
| Samlesbury and Rural East | 14 | 15 |
| Walton-Le-Dale | 16 | 15 |
| Total | 300 | 300 |

Source: BE Group, 2017

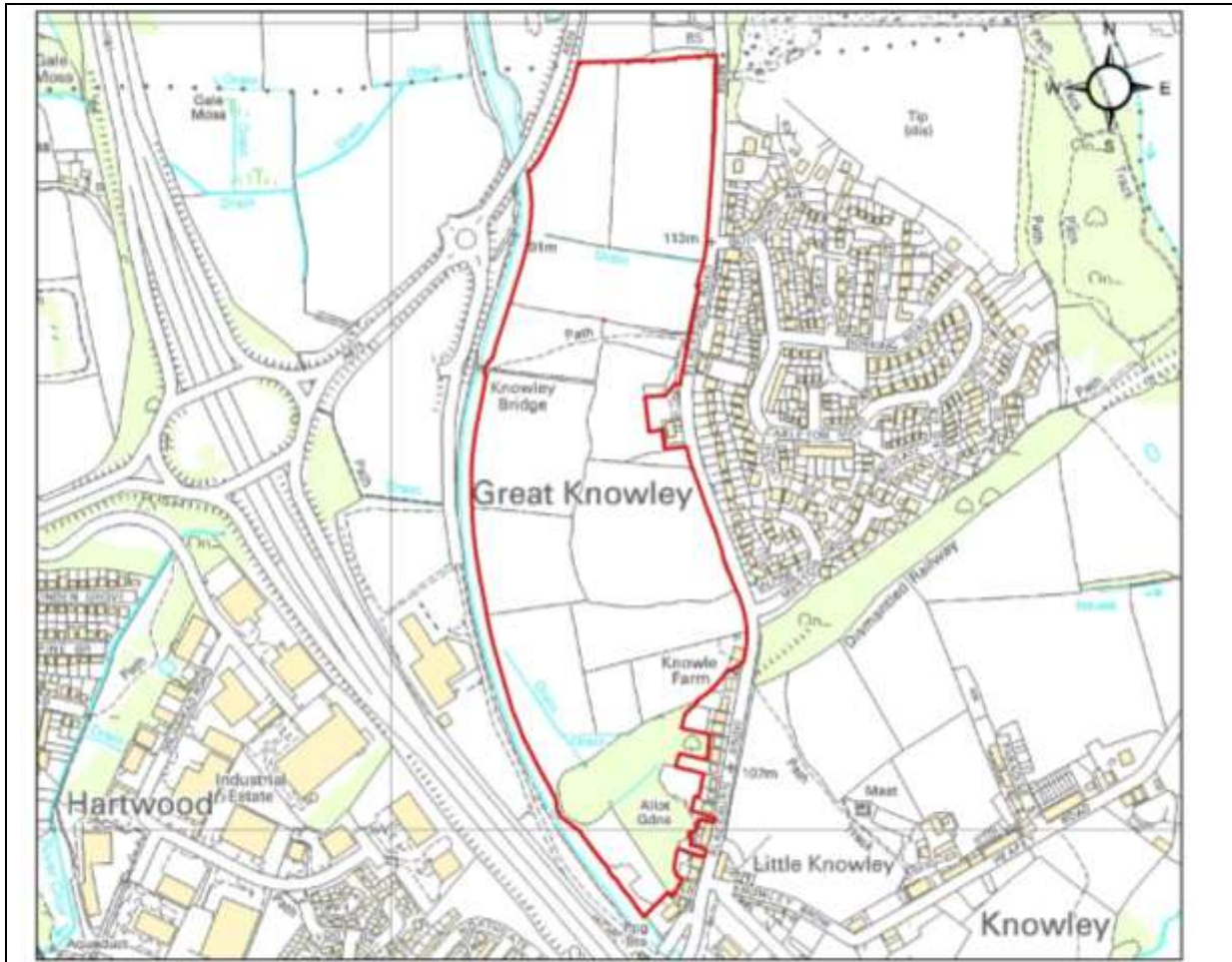
Appendix 4 – In and Out flows of Central Lancashire Commuters

| | Chorley | | | Preston | | | South Ribble | | |
|-----------------------|---|-----------------------------------|----------------------------------|---|-----------------------------------|----------------------------------|--|--|---------------------------------------|
| | Work Locations of Employed Residents of Chorley OUTFLOW | Origins of Chorley Workers INFLOW | Net Flow of Workers into Chorley | Work Locations of Employed Residents of Preston OUTFLOW | Origins of Preston Workers INFLOW | Net Flow of Workers into Preston | Work Locations of Employed Residents of South Ribble OUTFLOW | Origins of South Ribble Workers INFLOW | Net Flow of Workers into South Ribble |
| <i>Chorley</i> | 17,280 | 17,280 | N/A | 1,374 | 4,770 | 3,396 | 4,071 | 6,537 | 2,466 |
| <i>South Ribble</i> | 6,537 | 4,071 | (2,466) | 5,186 | 13,492 | 8,306 | 17,478 | 17,478 | N/A |
| <i>Preston</i> | 4,770 | 1,374 | (3,396) | 34,082 | 34,082 | N/A | 13,492 | 5,186 | (8,306) |
| Bolton | 2,453 | 1,468 | (985) | 506 | 1,015 | 509 | 633 | 658 | 25 |
| Wigan | 1,912 | 2,048 | 136 | 356 | 1,222 | 866 | 536 | 1,405 | 869 |
| Blackburn with Darwen | 1,328 | 739 | (589) | 942 | 2,315 | 1,373 | 1,276 | 1,278 | 2 |
| Manchester | 1,099 | 218 | (881) | 553 | 426 | (127) | 566 | 214 | (352) |
| West Lancashire | 1,077 | 942 | (135) | 353 | 1,298 | 945 | 849 | 1,177 | 328 |
| Fylde | 818 | 235 | (583) | 3,320 | 2,904 | (416) | 2,112 | 611 | (1,501) |
| Ribble Valley | 637 | 249 | (388) | 1,891 | 2,155 | 264 | 1,298 | 564 | (734) |
| Salford | 559 | 209 | (350) | 243 | 279 | 36 | 268 | 175 | (93) |
| Warrington | 496 | 149 | (347) | 254 | 199 | (55) | 363 | 193 | (170) |
| Trafford | 435 | 118 | (317) | 194 | 198 | 4 | 231 | 125 | (106) |
| Sefton | 360 | 400 | 40 | 186 | 886 | 700 | 402 | 619 | 217 |
| Hyndburn | 338 | 275 | (63) | 307 | 726 | 419 | 381 | 472 | 91 |
| Blackpool | 308 | 176 | (132) | 1,096 | 1,897 | 801 | 552 | 504 | (48) |
| Liverpool | 299 | 131 | (168) | 171 | 266 | 95 | 223 | 161 | (62) |
| Wyre | 274 | 226 | (48) | 1,299 | 2,404 | 1,105 | 404 | 534 | 130 |
| St. Helens | 251 | 204 | (47) | 99 | 227 | 128 | 147 | 233 | 86 |
| Bury | 248 | 184 | (64) | 94 | 242 | 148 | 106 | 155 | 49 |
| Lancaster | 213 | 173 | (40) | 542 | 1,657 | 1,115 | 250 | 457 | 207 |
| Rest of UK | 2439 | 1405 | (1,034) | 2180 | 5774 | 3,594 | 1919 | 2286 | 367 |
| Total | 44,131 | 32,274 | (11,857) | 55,228 | 78,434 | 23,206 | 47,557 | 41,022 | (6,535) |

Source: ONS 2011 Census

Appendix 5 – Chorley Employment Site Proformas

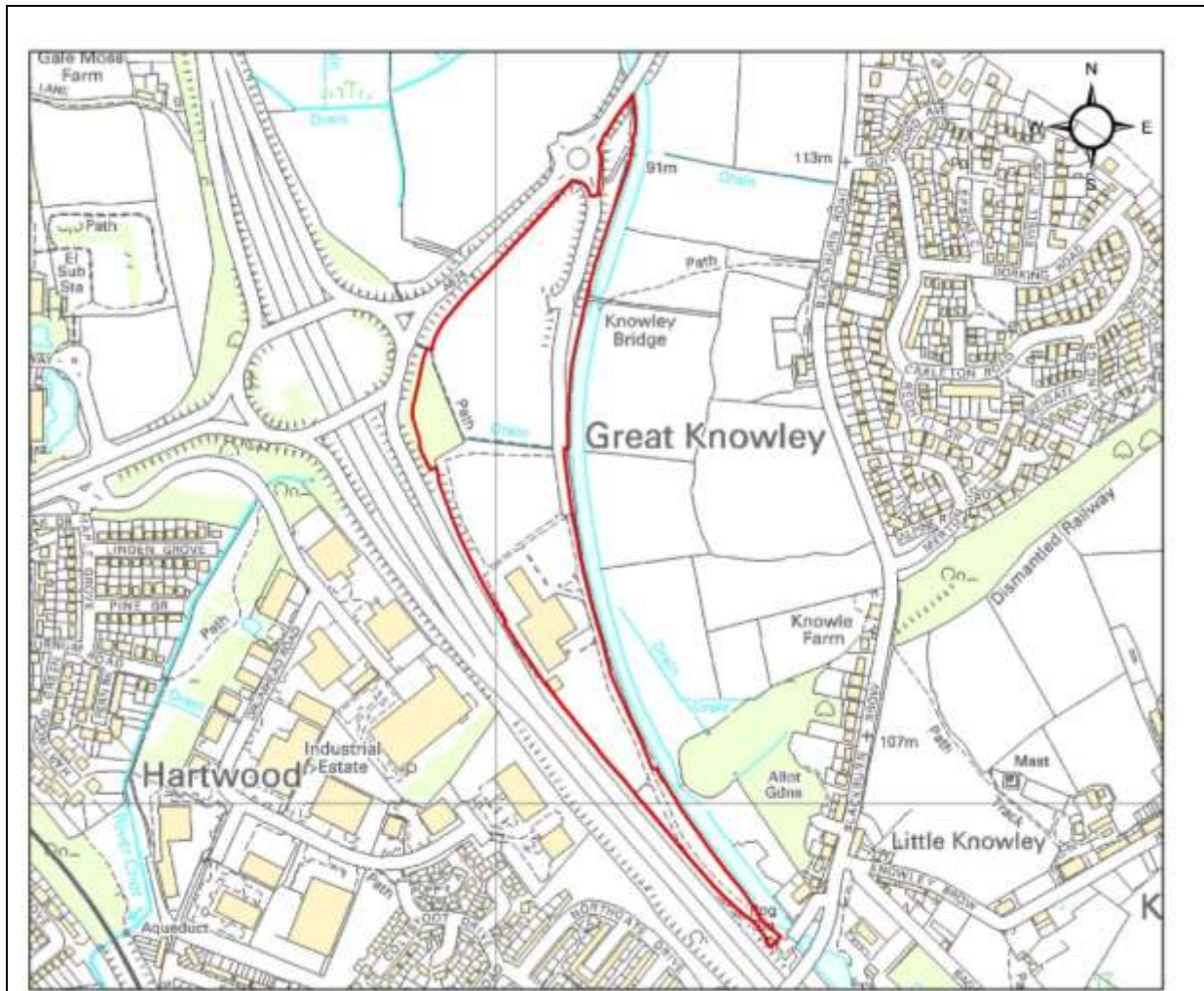
Local Plan Sites



| | |
|----------------------------------|--|
| Site Name | Great Knowley, Chorley |
| Policy Reference | EP1.1 |
| Owner | Multiple |
| Agent | Planit |
| Size, ha | 14.10 for Employment, with a further 9.6 ha allocated for housing in wider EP2 Policy – 23.7 in total. |
| Market Availability | Not Available |
| Planning Status (Allocated Uses) | <p>The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated.</p> <p>Core Strategy Policy 9 identifies this site as a sub-regionally significant development site for employment. The development of this site would help meet overall Borough employment requirements as set out in Table 5 of the Core Strategy. The site is allocated to provide a range of potential plot sizes to meet a variety of employment requirements.</p> <p>The adopted Chorley Local Plan Review 2012-2026 Policy EP1 (Employment Site Allocations) allocates 14.1 hectares for employment uses (B1 Business and B2 General Industrial) as an employment site for sub-regionally significant development.</p> <p>The site is also covered by Chorley Local Plan Policy EP2</p> |

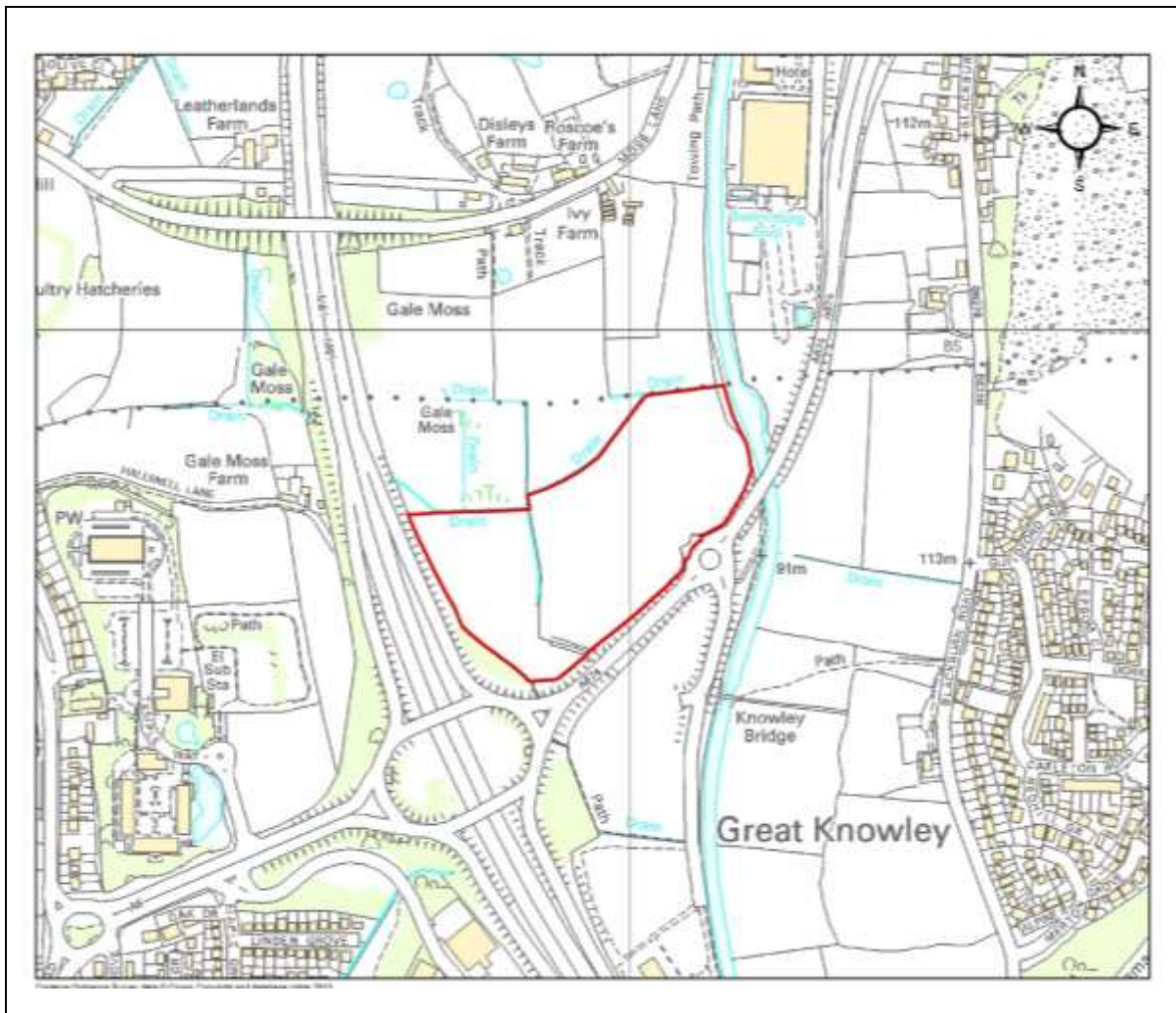
| | |
|----------------------------------|--|
| | <p>(Botany Bay /Great Knowley Area - Sub Regional Employment site and Mixed Use site) and Policy HS1.8 (Housing Site Allocation) which applies to a wider site area of 23.7 hectares comprising this site for employment use as above, 200 residential units (total site area 9.6ha), restaurants and cafes (Use Class A3) and drinking establishments (Use Class A4); water based leisure/recreation uses and pedestrian and cycle route adjacent to the canal with connectivity to the existing canal towpath.</p> <p>Policy EP2 requires that the comprehensive development of the site and the adjacent EP1.2 site (Botany Bay) is demonstrated through a masterplan, an agreed design code and phasing and infrastructure delivery schedule for the area.</p> |
| Proposal | <p>An illustrative Masterplan document prepared by Planit for Chorley Council and landowners was presented to Chorley Council's Executive Cabinet on 8th December 2016 for noting. The masterplan covers the whole of the Policy EP2 site. It proposes on this part of the site to accommodate 250 dwellings on a 9.96 ha net site. No B employment use is proposed. A new primary access will be developed off the A674.</p> <p>The Highway Agency has commissioned Mouchels to survey and micro model junction 8, M61 and junctions in the vicinity.</p> <p>Site is now the subject of two Outline planning applications (App. Nos. 17/00714/OUTmaj and 17/00716/OUTmaj) for 288 dwellings on two sites, totalling 11.97 ha with associated highways, landscaping and infrastructure provisions</p> |
| Constraints | <ul style="list-style-type: none"> • Topography of the site, the Leeds and Liverpool Canal and the slope up to Knowley Brow. • A Tree Preservation Order (No 8 (Chorley) 2006 and Definitive Footpath No 26 cross the site. • The sites are identified as being within multiple National Character Areas • Impacts to multiple ecological habitats • Need to provide a bridge across the Canal is a barrier to financial viability • Owner seeking housing • Possible junction investment around J8, M61 required |
| Comments | <p>Around half of the wider 23.7 ha EP2 site is now the subject of residential applications.</p> <p>Some 11.73 ha remains undeveloped in the south of the site and, in principle, available for B-Class development. In practice, viability, topography, adjacent housing and landowner intentions are likely to be significant barrier to any employment development in this area.</p> |
| Likely development potential | B1, B2 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Construction • Energy • Information and Communications • Administrative and Support • Creative and Digital |

| | |
|----------|---|
| | <ul style="list-style-type: none">• Finance and Professional• Health <p>Motorway-linked site, but suitability for Transport and Storage would be dependent on the scale and nature of the access arrangements secured.</p> |
| Serviced | No |



| | |
|----------------------------------|--|
| Site Name | Botany Bay, Chorley |
| Policy Reference | EP1.2 |
| Owner | First Investments/Chorley Expressway |
| Agent | First Investments |
| Size, ha | 5.90 for Employment, with a further 2.9 ha allocated for mixed uses in wider EP2 Policy – 8.8 in total. |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | <p>The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated.</p> <p>Core Strategy Policy 9 identifies part of this site as a sub-regionally significant development site for employment. The development of this site would help meet the overall Borough employment requirements as set out in Table 5 of the Core Strategy.</p> <p>The adopted Chorley Local Plan Review 2012-2026 Policy EP1 (Employment Site Allocations) allocates 5.90 ha for employment uses (B1 Business; B2 General Industrial; B8 Storage and Distribution) and Hotel (C1 use). The employment site is designated for sub-regionally significant development.</p> <p>This site is also covered by Chorley Local Plan Policy EP2 (Botany Bay /Great Knowley Area -Sub Regional Employment site and Mixed Use site) which applies to a wider area of 8.8 ha on this site comprising the above</p> |

| | |
|----------------------------------|--|
| | <p>employment and hotel uses; restaurant and cafes (Use Class A3); drinking establishments (Use Class A4); leisure uses (Use Class D2; Retail (Use Class A1) and pedestrian and cycle route adjacent to the canal.</p> <p>Policy EP2 requires that the comprehensive development of the site (and the adjacent EP1.1 site (Botany/Great Knowley) is demonstrated through a masterplan, an agreed design code and phasing and infrastructure delivery schedule for the area.</p> |
| Proposal | <p>An illustrative Masterplan document prepared by Planit for Chorley Council and landowners was presented to Chorley Council's Executive Cabinet on 8th December 2016. The masterplan covers the whole of the Policy EP2 site.</p> <p>The Masterplan proposes the EP1.2 site for:</p> <ul style="list-style-type: none"> • A1 retail totalling 16,027 sqm • A3 café restaurant • C1 Hotel use. <p>Overall total 18,899 sqm No B-Class employment uses are proposed.</p> <p>The Highway Agency has commissioned Mouchels to survey and micro model junction 8, M61 and junctions in the vicinity.</p> <p>The land is now the subject of an Outline planning application (App. No. 17/00715/OUT), for the following across the whole 8.8 ha site:</p> <ul style="list-style-type: none"> • Refurbishment of Botany Bay Mill for a greater mix of uses including A1, A3, B1, C1 and D1 • A1/A3 Retail Village of 20,737 sqm in 70 individual units • Car parking fronting the M61 |
| Constraints | <ul style="list-style-type: none"> • Leeds and Liverpool Canal • Definitive Footpath No 26 crosses the site • Owner seeking non B-Class employment • Possible junction investment around J8, M61 required |
| Comments | <p>The site has an existing access off the roundabout on the A674. Current application would redevelop the whole area for a primarily A1/A3 retail park. B1 uses are possible in the refurbished Botany Bay Mill, but no land is specifically retained for this purpose.</p> |
| Likely development potential | B1, B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Construction • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | Yes (Part) |



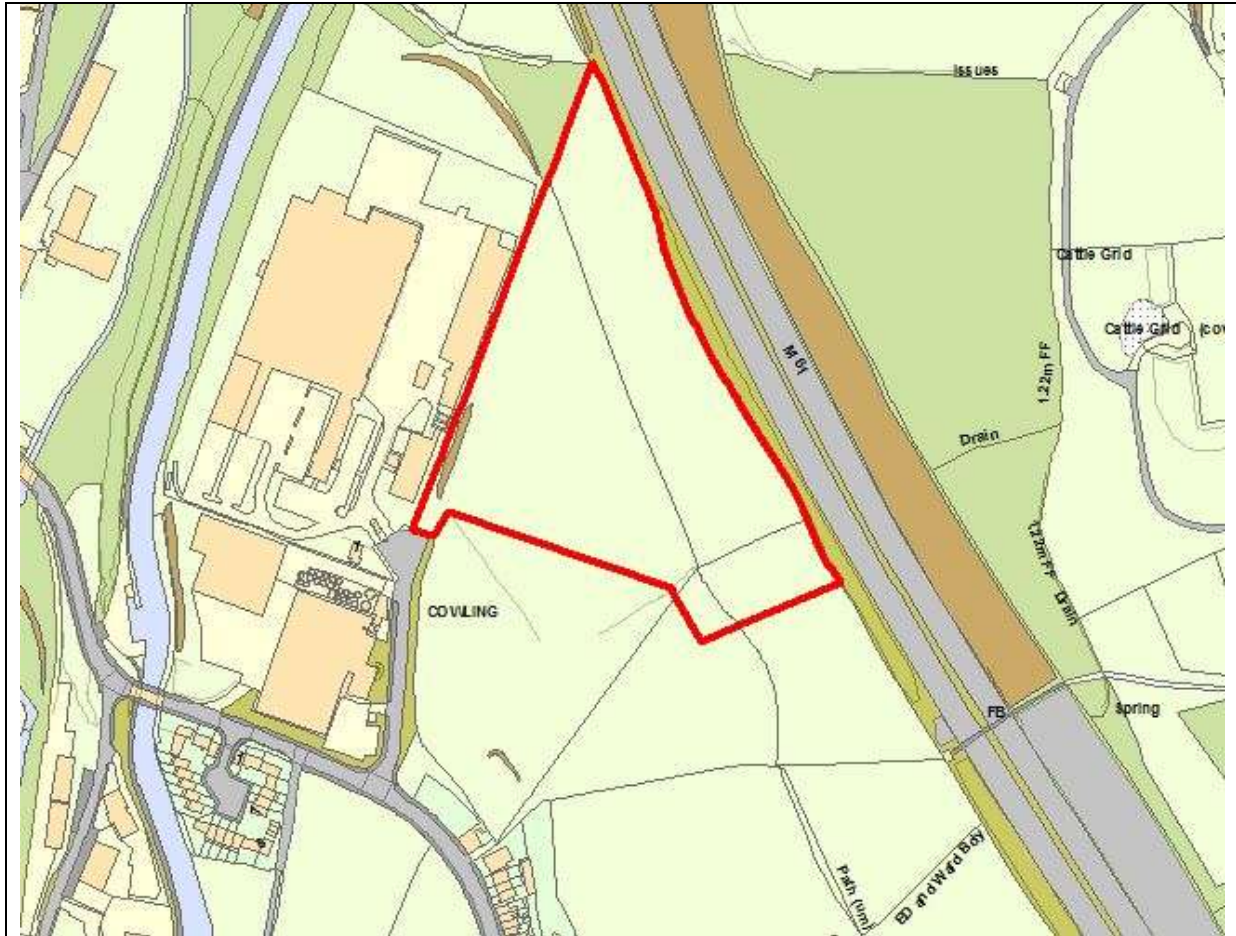
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| Site Name | Land to the North East of M61 junction (Gale Moss) Chorley |
| Policy Reference | EP1.3 |
| Owner | Private individual |
| Agent | - |
| Size, ha | 6.90 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1 Business, B2 General Industrial and B8 Storage and Distribution) |
| Proposal | <p>An illustrative Masterplan document prepared by Planit for Chorley Council and landowners was presented to Chorley Council's Executive Cabinet on 8th December 2016. The masterplan covers the whole of the Policy EP2 site.</p> <p>This land is proposed for B-Class employment within the wider masterplan and noted as 'Botany Bay Business Park'. Proposal is for larger industrial uses in three main plots here.</p> |

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| | The land is now the subject of an Outline planning application (App. No. 17/00713/OUT), all matters reserved apart from access, for 27, 871 sqm of B2 and B8 accommodation, car parking, landscape, drainage and other infrastructure. The employment space would comprise six units, indicatively split 75 percent B2, 25 percent B8 and capable of generating some 770 jobs. |
| Constraints | <ul style="list-style-type: none"> • The site is adjacent to the Green Belt. • The site is within an area forming part of the source of the River Chor. • Part of the site is within an ecological network – grassland identified by Lancashire County Council. • The site is crossed north to south by Footpath No 26 • Very little drainage infrastructure and no water infrastructure available in this area. |
| Comments | This site has an existing access off the roundabout on the A674. |
| Likely development potential | Larger B2/B8 for a motorway linked industrial/warehouse park |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Construction • Energy • Transport and Storage |
| Serviced | No |



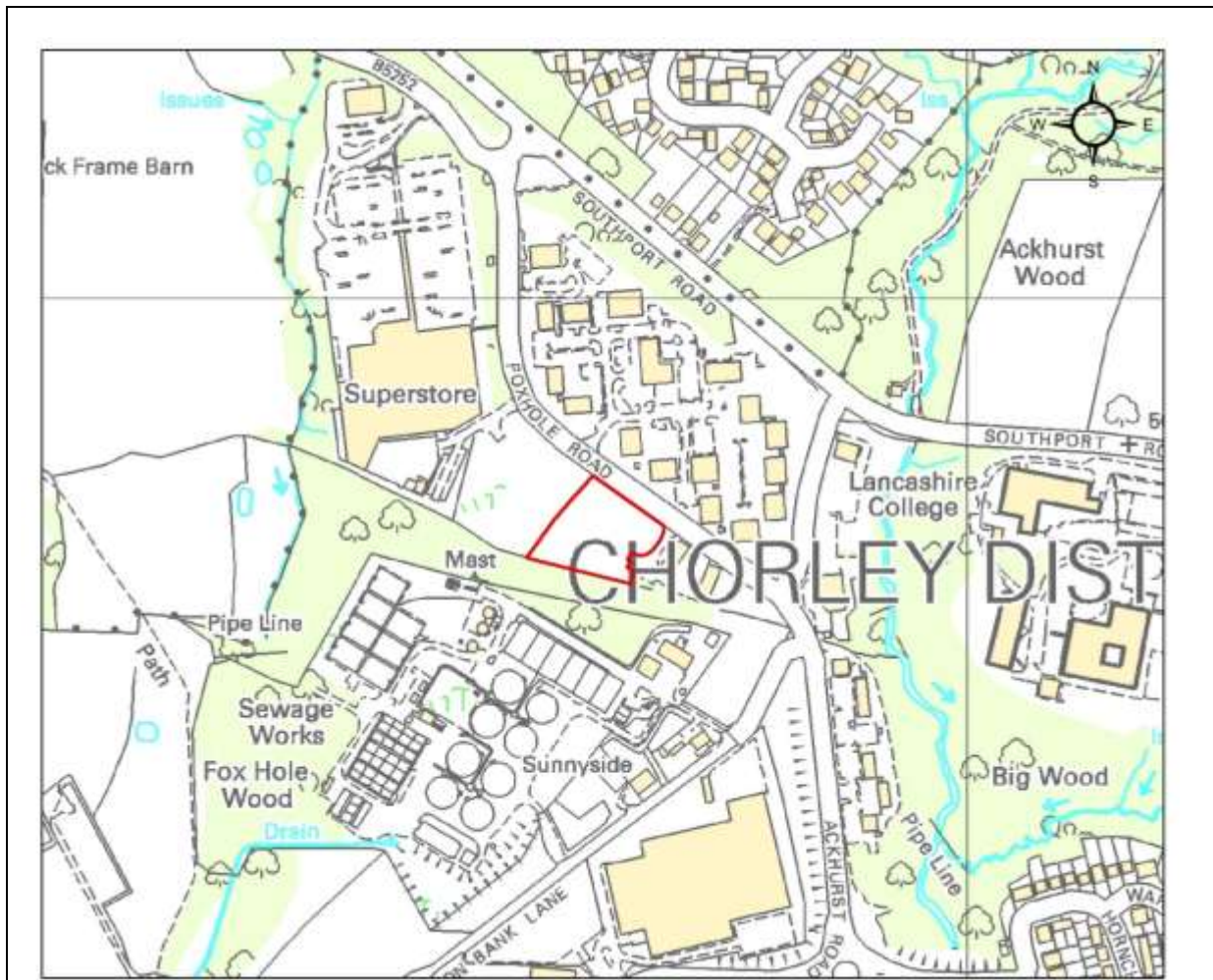
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| Site Name | Euxton Lane, Chorley |
| Policy Reference | EP1.5 |
| Owner | Part Private Individual, part Chorley Council. |
| Agent | - |
| Size, ha | 13.10 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1 Business, B2 General Industrial and B8 Storage and Distribution). |
| Proposal | <p>Planning consent (15/00224/OUT) has been granted on 10.42 ha of the total 13.1 ha allocated site for mixed use development comprising a Digital Health Park, industrial/employment units (Use Classes B1/B2/B8); Care Home and Specialist Care Facility (Use Class C2); local convenience store (Use Class A1) and 125 houses.</p> <p>Planning consent (16/00337/REM) was granted in May 2016 for an access (and spine road), appearance and layout of the digital park (use class B1), data centre (use class B8) and business centre (use class B1/B2/B8), The development has been conditioned to be built by 2018.</p> <p>The proposal comprises a:</p> <ul style="list-style-type: none"> • Data Centre – 2,300 sqm • Business Centre comprising 33 units – 4,542 sqm |

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| | <p>gross</p> <ul style="list-style-type: none"> • Digital office building – 5,195 sqm <p>The scheme is estimated to create 750 new jobs. Non B-Class uses will take up approx. 4.3 ha of the site.</p> |
| Constraints | <ul style="list-style-type: none"> • Access to the remaining allocated site needs to be provided. • Site reprofiling required • Pond on site, to be retained • Multiple ecological issues to be mitigated |
| Comments | <p>The scheme is referred to as the Strawberry Fields Digital Hub)</p> <p>Chorley Council has £4 million in ERDF funding to deliver this building by November 2018 and has been informally marketing the property, with some 15 potential end users identified. The scheme will offer co-location business space, break out/meeting rooms, serviced facilities and technical support. Also, onsite business advice and access to a university researcher will also be offered.</p> |
| Likely development potential | Primarily B1(a), B1(b), B1(c) |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | No |



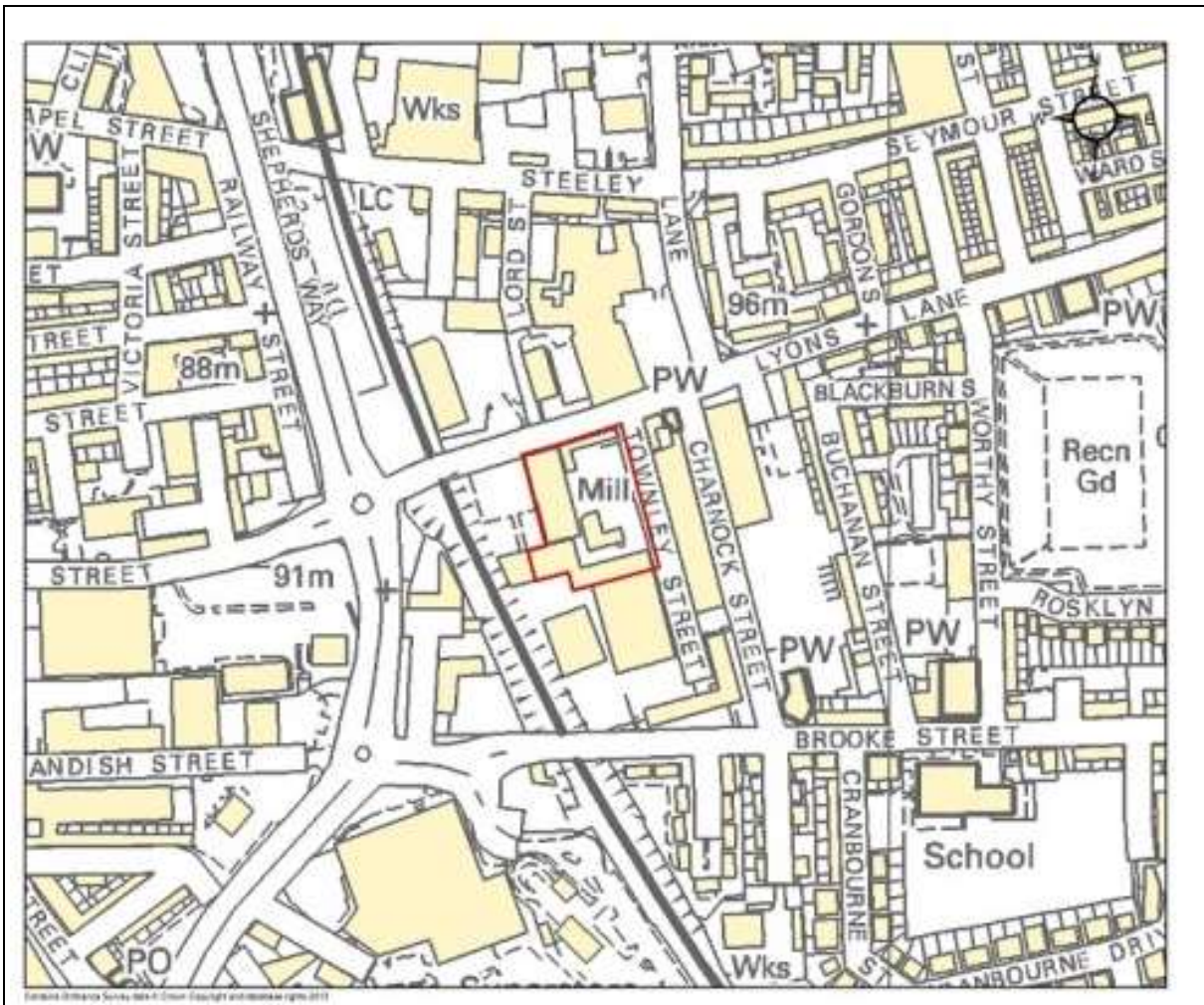
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| Site Name | Cowling Farm, Chorley |
| Policy Reference | EP1.6 |
| Owner | Chorley Council |
| Agent | - |
| Size, ha | 3.50 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | <p>The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. A 9.5ha site is allocated as a mixed use site. Local Plan Policy EP1 allocates 3.5 ha for employment uses (B1 Business, B2 General Industrial and B8 Storage and Distribution); Policy HS1.5 allocates 6ha for housing and Policy HS11 makes provision for a minimum of 5 permanent Gypsy and Traveller pitches on 0.4ha of land. The site should be subject to a Masterplan.</p> <p>Local Plan Policy ST1.11 protects a proposed cycle route through the site.</p> <p>Part of the Cowling Farm site is within an identified Mineral Safeguarding Area. Any development proposed within Mineral Safeguarding Areas must satisfy the criteria set out in Policy M2 of the Minerals and Waste Local Plan.</p> |
| Proposal | <p>A private developer will deliver the housing while Chorley Council will make provision for the gypsy site (0.4ha) and employment uses (3.50ha). No detailed delivery plans at present.</p> |

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| Constraints | <ul style="list-style-type: none"> • The site is large, fairly regular in shape but undulating and would require some re-contouring. • Housing adjacent • Footpaths No 4 and No 5 cross the site and there is a related footbridge across the M61. |
| Comments | - |
| Likely development potential | Assumed primarily B1(c), B2, B8 reflecting surrounding employment uses. Adjacent housing may place some limits on the scale and nature of operations though. |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Construction • Energy • Transport and Storage |
| Serviced | No |



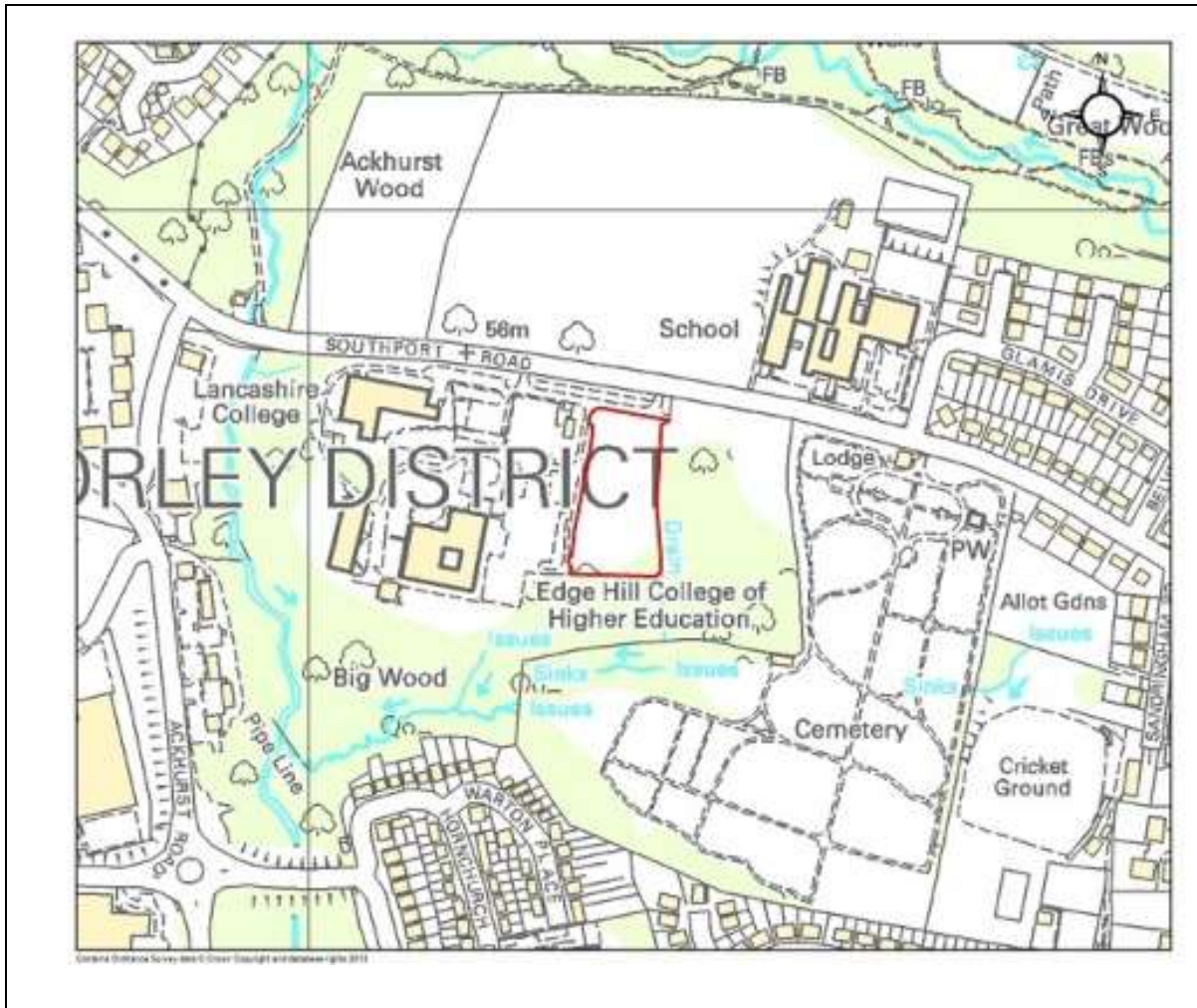
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| Site Name | Land at Ackhurst Business Park, Chorley |
| Policy Reference | EP1.7 |
| Owner | Nissan |
| Agent | None |
| Size, ha | 0.50 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1 Business, B2 General Industrial and B8 Storage and Distribution and A2 Financial and Professional Services). |
| Proposal | Chorley Nissan are proposing to develop the site for an enlarged car showroom, retaining its existing site to the east for second hand car sales. |
| Constraints | - |
| Comments | Access to the site can be obtained from that which services the adjacent public house off Foxhole Road. Access can also be obtained off Foxhole Road from Ackhurst Park. United Utilities has indicated that surface water should be separated and ideally discharged into the River Yarrow or into the established surface water sewer. |

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| | There are no water issues. |
| Likely development potential | Sui Generis Car Sales |
| Attractiveness to Growth Sectors | - |
| Serviced | No |



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| Site Name | Lyons Lane Mill, Townley Street Chorley |
| Policy Reference | EP1.8 |
| Owner | Elmwood Construction |
| Agent | JYM Partnership |
| Size, ha | 0.50 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1 Business and B2 General Industrial). |
| Proposal | <p>Planning consent comprising mixed use development consisting of 10 new starter industrial units, 3 refurbished existing units within an enclosed employment site together with 10 residential dwellings (12/00045/FULMAJ).</p> <p>Three refurbished units have been completed and have a B2 use class. They are now occupied</p> <p>Before occupation of each of the units 4-13 a scheme specifying the use class of that unit (either B1, B2 or B8) shall be submitted to and agreed in writing by the Local Planning Authority.</p> |
| Constraints | - |
| Comments | Vehicular access to the site is already established and is |

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| | via Townley Street Housing element is now under development |
| Likely development potential | Assumed B1(c)/B2 industrial |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none">• Advanced Manufacturing |
| Serviced | Yes |

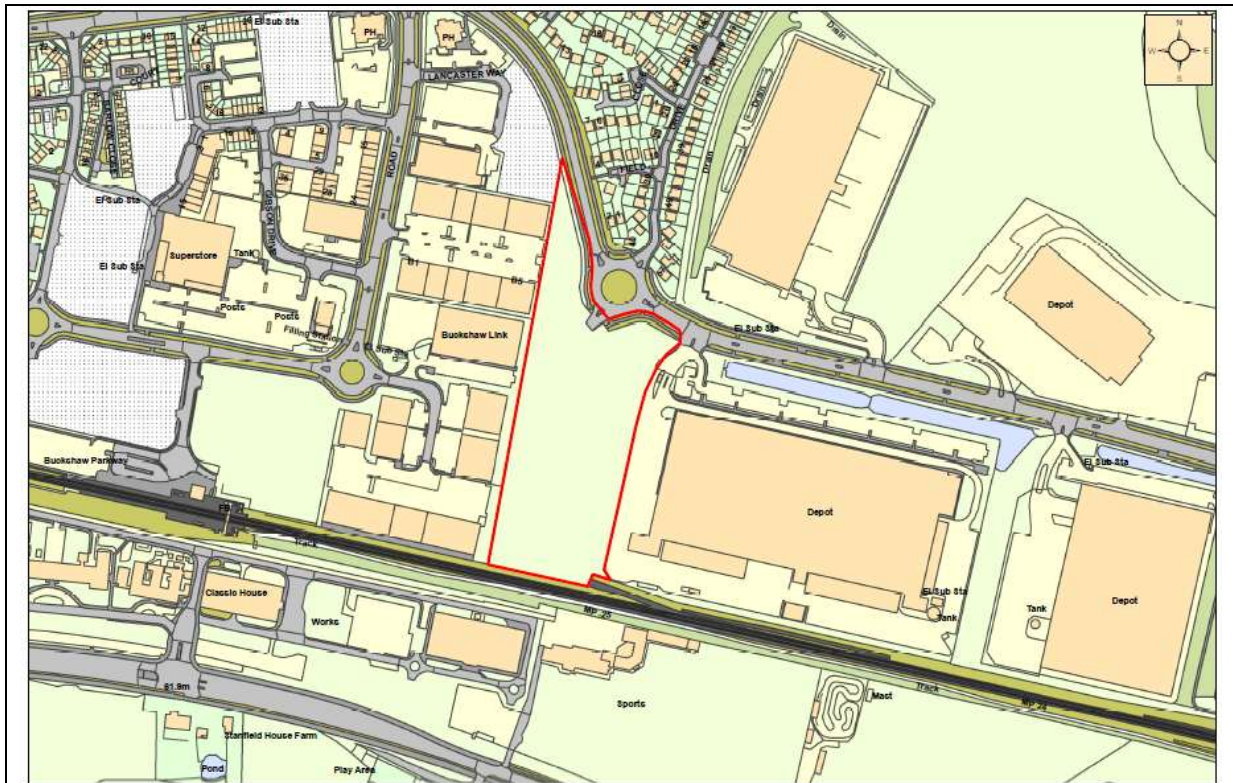


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| Site Name | Woodlands Centre, Southport Road, Chorley |
| Policy Reference | EP1.9 |
| Owner | Lancashire County Council |
| Agent | - |
| Size, ha | 0.80 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1 Business, and A2 Financial and Professional Services). |
| Proposal | None at present |
| Constraints | <ul style="list-style-type: none"> • Within the employment allocation there is a Tree Preservation Order (TPO6 (23 April 1992)) which comprises 13 individual trees, a group of trees and on the southern boundary woodland which extends beyond the site. • Land adjacent and to the east and south of the allocation is included within a Biological Heritage Site known as Big Wood which forms woodland and |

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| | scrubland (Policy BNE9). |
| Comments | Lancashire County Council presently owns a larger site known as Woodlands containing the Woodlands Conference Centre and Lancashire Adult Learning occupied by Nelson and Colne College. The allocation sits within the boundary of this larger site. The Woodlands site has a dedicated in access with a right turning lane off the A581 Southport Road and a separate exit access with left and right turning lanes onto Southport Road. There are no immediate plans for the take up of this land, however. |
| Likely development potential | If not required for education facilities, then an associated offer of smaller, possibly serviced offices is likely |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | No |



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|----------------------------------|--|
| Site Name | Stump Lane, Chorley |
| Policy Reference | EP1.10 |
| Owner | Workspace Properties |
| Agent | Workspace Properties |
| Size, ha | 0.28 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. |
| Proposal | The site has been completed for B1 and B2 uses. |
| Constraints | - |
| Comments | The site is built out, completing the Chorley Central Business Park |
| Likely development potential | Developed for B1(c)/B2 units |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> Advanced Manufacturing |
| Serviced | Yes |



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|----------------------------------|--|
| Site Name | The Revolution, Buckshaw Avenue, Buckshaw Village |
| Policy Reference | EP1.11 |
| Owner | Kimberley Clarke |
| Agent | - |
| Size, ha | 3.26 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Buckshaw Village, which Core Strategy Policy 1 designates as a Strategic Site for mixed use, brownfield development. Chorley Local Plan Policy EP1 allocates this site for employment uses (B2 General Industrial and B8 Storage and Distribution). |
| Proposal | Remaining land parcel is south of Buckshaw Avenue, at roundabout. Land would likely form an extension to the adjacent Kimberley Clarke facility. |
| Constraints | None |
| Comments | If not required by Kimberley Clarke would suite a scheme of small to mid-sized good quality B2/B8 units, comparable to those located to the west. |
| Likely development potential | B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> Advanced Manufacturing Transport and Storage |
| Serviced | No |

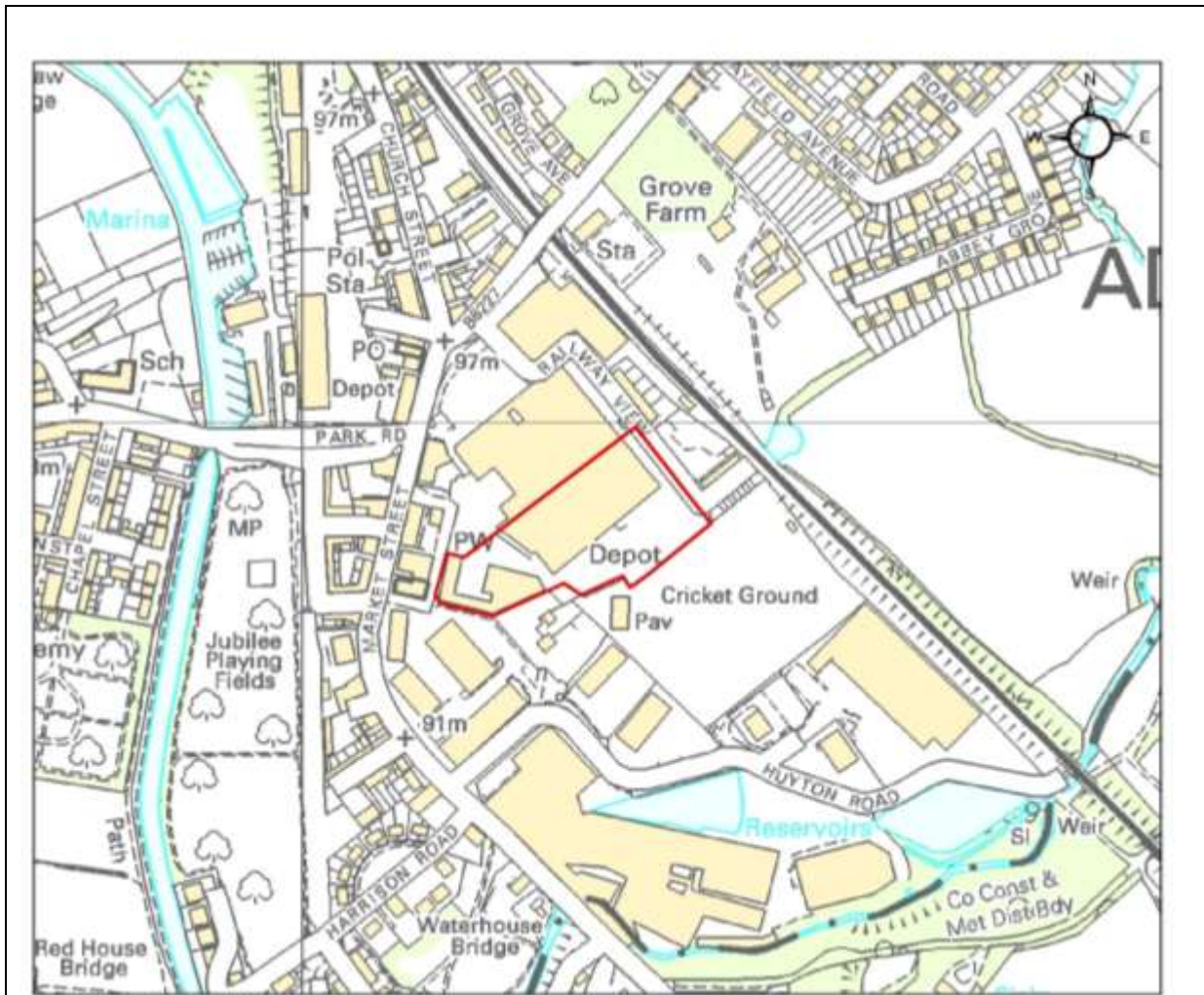


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| Site Name | Group 1, Buckshaw Village |
| Policy Reference | EP1.12 |
| Owner | Persimmon Homes |
| Agent | Lea Hough |
| Size, ha | 5.40 ha but net plot area is 2.17 ha, comprising: <ul style="list-style-type: none"> • C1: 1.04ha • C2: 1.13 ha |
| Market Availability | On the market, for sale |
| Planning Status (Allocated Uses) | The site is within Buckshaw Village and known as Group 1, which Core Strategy Policy 1 designates as a Strategic Site for mixed use, brownfield development. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1: Business and B2 General Industrial). |
| Proposal | 08/00910/OUTMAJ Outline planning application for the redevelopment of land at Group One includes B1 and B2 as well as residential development. |
| Constraints | - |
| Comments | Land is being actively marketed for freehold disposal. Agents report modest interest, to date, mostly from occupiers/developers looking for B1(c)/B2 options |
| Likely development potential | B1(c)/B2 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage |
| Serviced | No |



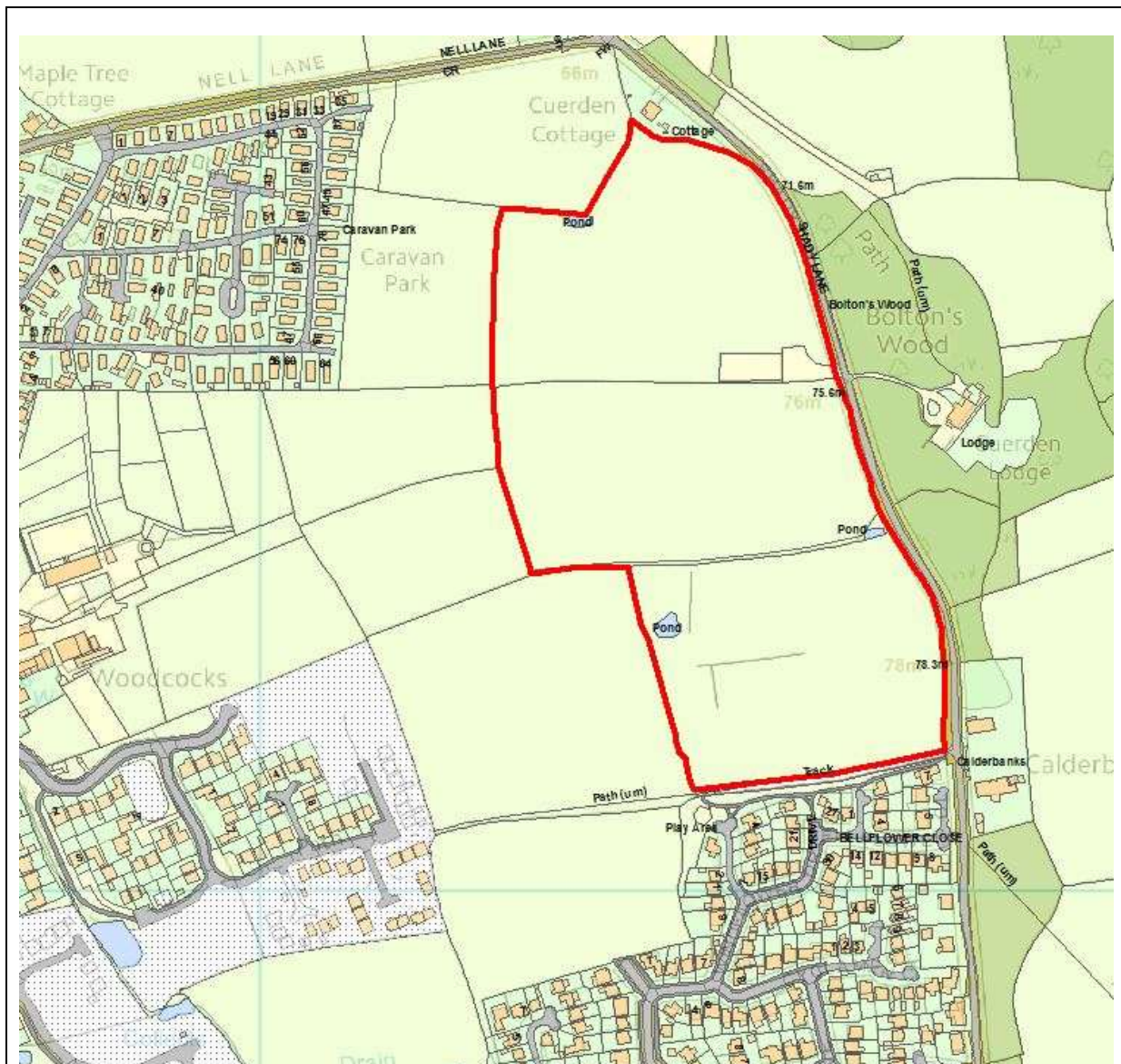
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| Site Name | Southern Commercial, Buckshaw Village |
| Policy Reference | EP1.13 |
| Owner | Suma Developments/Lancashire County Council (Northern Site) Orbit Investments Properties Ltd (Southern Site) |
| Agent | |
| Size, ha | 7.76, but net developable area is 3.16 ha in two parcels: <ul style="list-style-type: none"> • 0.56ha to the north of Gibson Lane (Northern Site) • 2.60ha from Ordnance Road/Station Approach (Southern Site) |
| Market Availability | Southern Site, land being marketed for design and build office development by Orbit |
| Planning Status (Allocated Uses) | The allocation is within Buckshaw Village, which Core Strategy Policy 1 designates as a Strategic Site for mixed use, brownfield development. Chorley Local Plan Policy EP1 allocates this site for employment uses (B1: Business and B2 General Industrial and B8 Storage and Distribution). |
| Proposal | <p><i>Northern Site</i></p> <p>Owner now seeking consent for three Use Class B1 units of 180 sqm each and a restaurant with drive-thru including car parking, access, landscaping and associated works (17/00764/FULMAJ).</p> <p><i>Southern Site</i></p> <p>Consented for 5 office buildings (14/01030/REMAJ).</p> |
| Constraints | <ul style="list-style-type: none"> • Development viability on southern site |
| Comments | <p><i>Northern Site</i></p> <p>Owner now seeking consent for small business units and a drive-thru restaurant (identified as being for KFC).</p> |

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| | <p><i>Southern Site</i></p> <p>Orbit have owned this site for some eight years and have been actively marketing the location. The land has received interest, primarily from local businesses looking to expand.</p> <p>It is likely the site will be delivered as design and build options only, over a period of several years. While demand supports the speculative development of an initial office property of 2,500 sqm to attract an anchor tenant and prove the wider scheme, financial viability is a barrier to this. Orbit seek an average rent of £15.95/sqft to support new build development and local office rents do not exceed £12-13/sqft. Against projected construction costs of £112/sqft (total development cost for the whole scheme are estimated at £3.35 million) it is difficult for Orbit's officers to make a case for this.</p> |
| Likely development potential | B1(a), B1(c), B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | Yes (Part) |



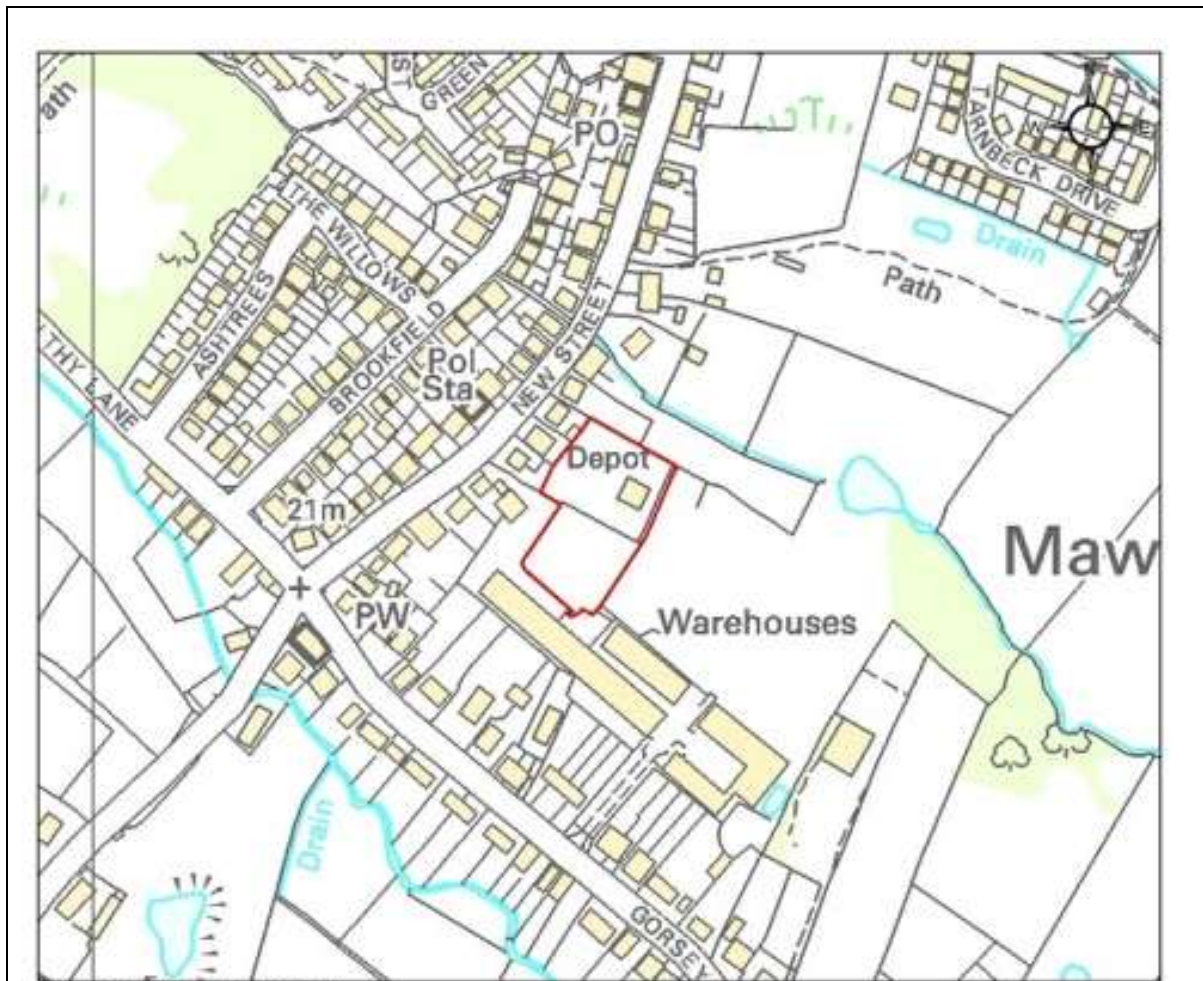
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| Site Name | Fairport, Market Place Adlington |
| Policy Reference | EP1.14 |
| Owner | Fairport Engineering Limited |
| Agent | - |
| Size, ha | 0.60 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Adlington, which Core Strategy Policy 1 designates as an Urban Local Service Centre where some growth and investment will be encouraged to help meet housing and employment needs. A larger site of 1.5ha has been allocated as a mixed use site. Chorley Local Plan Policy EP1 allocates a site for employment uses (B1 Business and B8 Storage and Distribution) comprising 0.6ha and Policy HS126 allocates 0.9 ha for housing use. |
| Proposal | None – Fairport has no identified plans for further investment at this location |
| Constraints | <ul style="list-style-type: none"> • Site would need to be cleared by existing occupier Fairport. • Access would be required from Market Place/B6227 Railway Road. • Proposals would need to consider residents located at Railway View and Meadow Street located to the north east of the allocated site. |

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| Comments | At present land could only be used by Fairport |
| Likely development potential | Assumed B2/B8, reflecting current occupancy |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none">• Advanced Manufacturing• Transport and Storage |
| Serviced | Yes |



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| Site Name | Land east of Wigan Lane, Clayton-Le-Woods |
| Policy Reference | EP1.15 |
| Owner | Chorley Council |
| Agent | - |
| Size, ha | 15.00 but net developable area for B-Class use expected to be 8.03 ha |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Clayton-Le-Woods (Lancaster Lane), which Core Strategy Policy 1 designates as an Urban Local Service Centre where some growth and investment will be encouraged to help meet housing and employment needs. A larger site of 52.14 ha for mixed use was allocated. Chorley Local Plan Policy EP1.15 allocates a site for employment uses (B1 Business and B8 Storage and Distribution) comprising 15 ha and Policy HS1.31 allocates 37.14ha for housing use (720 dwellings). |
| Proposal | Chorley Council will support delivery of 8.03 ha of land for employment uses. The remainder of the original allocation will be used for residential uses (with proposals now being progressed) and associated services and |

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| | facilities, including a primary school. |
| Constraints | <ul style="list-style-type: none"> • Waterbodies cross site • Ponds on site • Trees on site • Footpath 14 extends along the southern boundary of the site • One active farm tenancy on the site Some £1.6 million in Growth Funding available to open this up. |
| Comments | - |
| Likely development potential | Mixed B1, B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Construction • Energy • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | No |



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| Site Name | Rear of New Street, Mawdesley |
| Policy Reference | EP1.17 |
| Owner | Northern site: Private Individual Southern site: G.T Goodyear |
| Agent | - |
| Size, ha | 0.60 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Mawdesley, which Core Strategy Policy 1f) In other places – smaller villages – development will typically be small scale and limited to appropriate infilling, conversion of buildings and proposals to meet local needs unless there are exceptional reasons for larger scale redevelopment schemes. Chorley Local Plan Policy EP1 allocates a site for employment uses (B1 Business). |
| Proposal | Northern site is New Street Garage Southern site used as parking/open storage for Goodyear Furniture Centre. |
| Constraints | <ul style="list-style-type: none"> • Current access via narrow track between houses • Possible contamination on some land • Backland location |
| Comments | Access could be provided from New Street and or Gorse Lane. |
| Likely development potential | Assumed small scale B1(c)/B2/B8 uses |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing |

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| | <ul style="list-style-type: none">• Transport and Storage• Construction |
| Serviced | Yes (part) |

Other Employment Consents



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| Site Name | Golden Acres, Plocks Farm, Liverpool Road, Bretherton |
| Policy Reference | Plan App.1 (App No. 15/00888/FULMAJ) |
| Owner | GA Pet Food Partners Group |
| Agent | Steven Abbott Associates LLP |
| Size, ha | 4.19 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Consent within the Green Belt |
| Proposal | <p>Permission Expiry Date Jan 2019</p> <p>Proposal for the erection of buildings, engineering operations and related development, all within the curtilage of the existing Class B2 production complex, to create: larder (finished product), ingredients kitchen, meat kitchen, fridge, combined heat and power plant (CHP), water storage tanks, odour abatement plant comprising wet scrubber and bio bed anaerobic digestion plant, offices and car park, River Douglas embankment repairs and 5m high acoustic fencing within the complex</p> |

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| Constraints | Adjacent to River Douglas, parts of site in Flood Zones 2 and 3. |
| Comments | The site forms part of a private pet food factory. A masterplan has been prepared for the site as part of the planning consent. Construction underway as of May 2017 |
| Likely development potential | B2 Production |
| Attractiveness to Growth Sectors | For single company use only |
| Serviced | Yes |



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| Site Name | Land adjacent Weir Mill, Crosse Hall Street, Chorley |
| Policy Reference | Plan App.2(App No. 14/00912/FUL) |
| Owner | Lyndhurst Engineering |
| Agent | - |
| Size, ha | 0.26 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. |
| Proposal | Permission Expiry Date Nov 2017 Erection of an extension to the existing industrial unit (Use Class B1 (c)) with part first floor ancillary office accommodation and the erection of a new detached industrial unit (Use Class B1 (c)) and associated parking. |
| Constraints | - |
| Comments | The site is within an existing industrial area. The extension to the existing industrial unit has been constructed. The site has existing access from Cowling Brow. Site cleared but no development of the new detached industrial unit in evidence as of May 2017 |
| Likely development potential | B1(c) industrial |
| Attractiveness to Growth Sectors | For single company use only |
| Serviced | Yes |



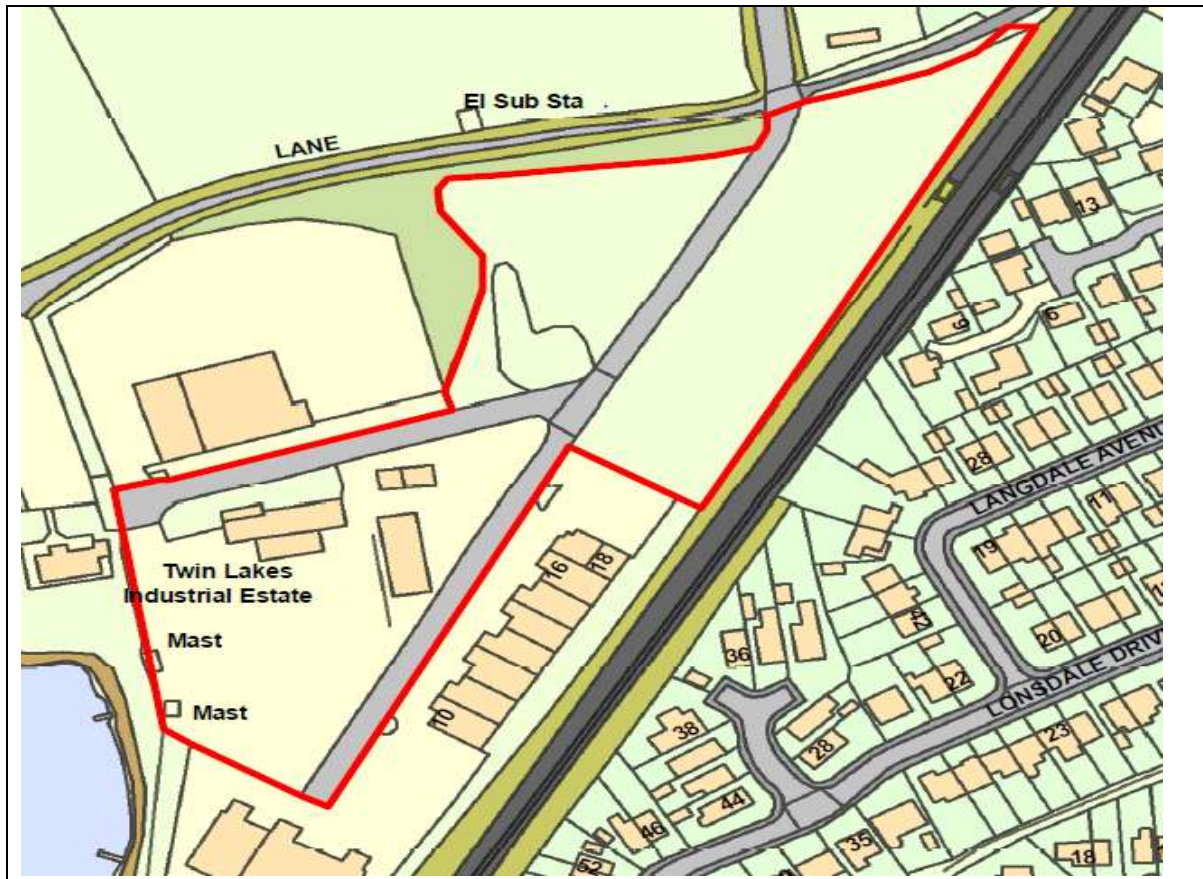
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| Site Name | Daizel Unit C3, Chorley North Industrial Park, Drumhead Road, Chorley |
| Policy Reference | Plan App.3(App No. 16/00014/FUL) |
| Owner | Dalziel Limited |
| Agent | Thomas Architects |
| Size, ha | 0.50 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The site is within Chorley Town, which Core Strategy Policy 1 designates as a Key Service Centre where growth and investment should be concentrated. |
| Proposal | Permission Expiry Date Mar 2019 Proposed extension to existing chill store (B8 use class) and formation of new access. |
| Constraints | - |
| Comments | The site is within an existing industrial estate and has existing access from Drumhead Road and the A674. The extension has been completed, |
| Likely development potential | B8 storage |
| Attractiveness to Growth Sectors | For single company use only |
| Serviced | Yes |



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| Site Name | Unit 1, Blainscough Works, Blainscough, Coppull |
| Policy Reference | Plan App.4(App No. 14/00572/FUL) |
| Owner | GM Demolition |
| Agent | Chris Weetman |
| Size, ha | 0.50 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | The existing employment site is located within an area allocated as safeguarded land for future development needs (Policy BNE3.6 Blainscough Hall, Coppull) |
| Proposal | Permission Expiry Date Aug 2017 Extension to existing building to form 3 industrial units with flexible uses (Use Classes B1C, B2 and B8) |
| Constraints | Footpath No 99 Public Right of Way |
| Comments | The site is under construction, developed to shell as of May 2017. Existing access is off Blainscough Lane and the A49 |
| Likely development potential | Smaller B1(c) light industrial units |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Construction |
| Serviced | Yes |

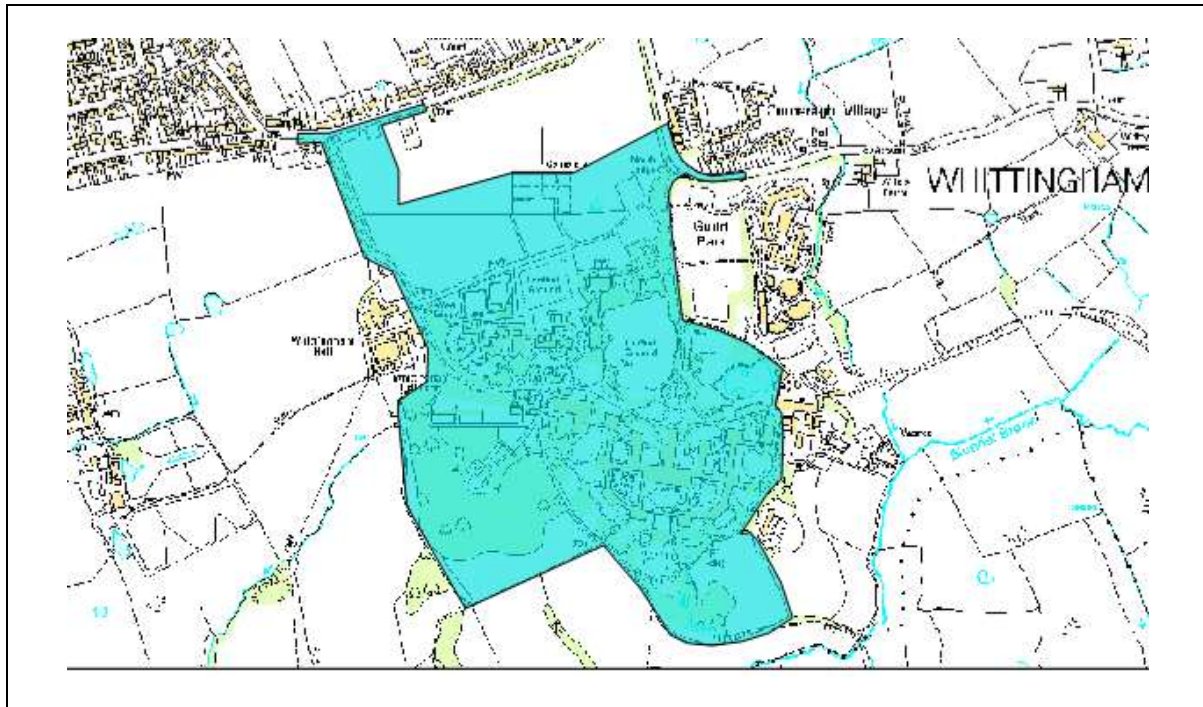


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| Site Name | DP Cold Planing, Chapel Lane, Coppull |
| Policy Reference | Plan App.5 (App No. 15/01225/FUL) |
| Owner | DP Cold Planing |
| Agent | Peter Dickinson Architects |
| Size, ha | 0.30 |
| Market Availability | Not Available |
| Planning Status (Allocated Uses) | The site is within the settlement of Coppull identified as an Urban Local Service Centre suitable for some growth and investment in Policy 1(d) of the Central Lancashire Core Strategy, to help meet employment needs. |
| Proposal | Permission Expiry Date 04 Feb 2019 Erection of extension to existing industrial unit and erection of new industrial unit |
| Constraints | - |
| Comments | Land appears in use as joinery yard for ABC Fencing. No evidence of development as of May 2017. |
| Likely development potential | B1(c) industry |
| Attractiveness to Growth Sectors | For single company use only |
| Serviced | Yes |



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| Site Name | Twin Lakes Industrial Estate, Brickcroft Lane, Croston |
| Policy Reference | Plan App.6 (App No. 95/00426/FUL) |
| Owner | Ruttle Plant Hire and Plant Sales |
| Agent | - |
| Size, ha | 1.90 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Site is located within the Green Belt |
| Proposal | Permission Expiry Date June 2001 – but consent has been partially implemented. Erection of 27 Industrial Units. |
| Constraints | Part of site is in Flood Zone 2. Much of the site is within 250m buffer of landfill. |
| Comments | The permission has been partially implemented with the erection of 6 industrial units. Some of the site is used for the open storage of equipment hire by a company Readyplant. Other space appears to have been developed to shell, but no evidence of further progression as of May 2017. |
| Likely development potential | Smaller B1(c) light industrial units |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Construction |
| Serviced | Yes (part) |

Appendix 6 – Preston Employment Site Proformas



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| Site Name | Whittingham Hospital |
| Policy Reference | EP1.1 |
| Owner | HCA |
| Agent | Nexus Planning |
| Size, ha | 1.4 – It should be noted that HCA plans indicate a larger site with a net developable area of 2.5 ha. |
| Market Availability | Marketed for disposal by HCA |
| Planning Status (Allocated Uses) | Allocated for B1 in the Local Plan 2012-2026 |
| Proposal | 06/2013/0779 - Redevelopment of site to provide up to 650 (Class C3) residential dwellings, up to 9000 sqm (Class B1) office/light industrial use, primary school, senior playing pitch, tennis court, relocation of bowling green, recreational and play facilities, new access to Whittingham Lane and alterations to existing access to Cumeragh Lane, open space, landscaping and associated infrastructure (including retention of existing cricket pitch and pavilion) (outline application) (application for extension of time limit to previously approved planning application 06/2007/0946) Application does not set a timetable for delivery of the employment uses |
| Constraints | <ul style="list-style-type: none"> • Bat roosts on site • Trees and hedgerows onsite • Buildings/foundations to be cleared • Access to be upgraded. |
| Comments | On the larger site as a whole there has been a reserved matters permission for phase 1 of the development by Taylor Wimpey which is currently under construction for the erection of 132 dwellings and a further 18 apartments. HCA noted that disposal of employment site is approved and initial marketing underway, with some interest. Indicative timetable would see delivery commence in |

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| | 2019. |
| Likely development potential | Smaller business park of mixed B1(a), B1(c), B2 and limited B8 likely |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health Unlikely to suit larger transport and storage occupiers |
| Serviced | No |



| | |
|----------------------------------|--|
| Site Name | Red Scar Site H |
| Policy Reference | EP1.2 |
| Owner | Tustins |
| Agent | HDAK, Robert Pinkus and Co, WHR |
| Size, ha | 2.75 |
| Market Availability | On the market for Design and Build options |
| Planning Status (Allocated Uses) | Allocated for B2 and B8 uses |
| Proposal | Land comprising Employment Sites EP1.2 and EP1.4 is now on the market as some 16 design and build plots of 0.4-1.6 ha, capable of producing premises of 2787 to 11,613 sqm for leasehold, long leasehold (125 years) or freehold basis. These have attracted only modest interest to date. |
| Constraints | <ul style="list-style-type: none"> • Woodland- small section to the northern boundary • Large drainage pond on site • Some Flood Risk • An overhead power cable currently runs across the site towards the southern boundary. • In addition, a foul sewer and culverted watercourse are known to run across the site. |
| Comments | Access in place |
| Likely development potential | Anticipated occupiers would be mid-sized logistics operators |

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| Attractiveness to Growth Sectors | • Transport and Storage |
| Serviced | No |



| | |
|----------------------------------|--|
| Site Name | Preston East Employment Area |
| Policy Reference | EP1.3 |
| Owner | Multiple, including HCA |
| Agent | - |
| Size, ha | 13.13ha – Reducing to 8.36 ha to allow for completions totalling 4.77 ha |
| Market Availability | Partly available – South West Land actively being marketed for Design and Build uses |
| Planning Status (Allocated Uses) | Allocated for B1(b), B2, B8 uses |
| Proposal | <p>06/2014/0323 - Outline planning application for the development of an employment area comprising general industrial (Class B2) and warehouse (Class B8) uses on 17.25 ha of land with access from Bluebell Way (application for extension of time limit to previously approved planning application 06/2006/1154).</p> <p>Diverse recent consents/proposals across the sites:</p> <p>South West Site - Part of site:</p> <ol style="list-style-type: none"> 1) Has been developed for Girl Guides HQ under permission 06/2011/0744 – 1.10ha 2) Has permission under 06/2011/0567 for an access road which was built and a storage and distribution warehouse). Not implemented. 3) 06/2015/0235 - Erection of 2no. car showrooms with servicing areas, 1no. workshop/service/cleaning building and associated compound, customer and staff parking, car display areas, vehicular access from Guiding Road, access road with the site and associated landscaping – 2.44ha. <p>North East Site – Part of site</p> <ol style="list-style-type: none"> 1. 06/2011/0189 - Erection of 1no. general industrial unit (Class B2), 1no. storage and warehouse unit (Class B8) and creche, construction of vehicular and pedestrian access to Lancashire Way, and |

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| | <p>parking and servicing provision, and associated landscaping. The B2 unit and creche have been built but not the B8 unit – 1.23 ha</p> <p>2. 06/2011/0682 - Erection of 2no. general industrial units (Class B2), coffee shop/restaurant (Class A3) with drive-through facility and outdoor seating, car and HGV parking, servicing provision and associated landscaping. The A3 of this permission was built but not the B2. It is on the same site as 06/2011/0189 – Included in the above.</p> <p>3. 06/2012/0696 - Site A3 Unit 1, Lancashire Way, Preston, Lancashire. Erection of single storey extension to front and side of industrial building – this has been implemented and refers to the B2 unit developed under 06/2011/0189 – Included in the above.</p> <p>4. 06/2011/0656 - Erection of 1no. general industrial building 2,783 sqm (Class B2) and 1no. recycling centre building 3,198 sqm (Class B8). Not implemented.</p> <p><i>Developed land thus totals 4.77 ha.</i></p> |
| Constraints | <ul style="list-style-type: none"> • Hedgerows and linear belts of trees act as valuable wildlife corridors. • Trees and hedgerows on site • Abandoned water mains run from the north east to south west of the South West Site • Potential abnormal costs for gas and water infrastructure. |
| Comments | - |
| Likely development potential | Assumed that ongoing incremental take up will continue for a mix of B1(a), B1(c), B2, B8 uses |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Construction • Energy • Transport and Storage – But remaining plots unlikely to support larger logistics options • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health. |
| Serviced | Yes (part) |



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| Site Name | Red Scar Industrial Estate |
| Policy Reference | EP1.4 |
| Owner | Tustins |
| Agent | HDAK, Robert Pinkus and Co, WHR |
| Size, ha | 21.31 |
| Market Availability | On the market for Design and Build options |
| Planning Status (Allocated Uses) | Allocated for B2, B8 in the Local Plan 2012-2026 |
| Proposal | <p>Several previous consents:</p> <ul style="list-style-type: none"> • 06/2015/0171 (east of the site) approved with conditions – Erection of 3no steel frame industrial units. Not commenced. • 06/2014/0793 – (east of the site) Temporary buildings comprising 7no. linked portable cabins, 2no. free standing cabins and 1no. nissen shed scaffolding. Not commenced • 06/2011/0430 – (east of the site) Erection of 1no. Industrial building and associated land for open storage. Built 0.84 ha. <p>Land comprising Employment Sites EP1.2 and EP1.4 is now on the market as some 16 design and build plots of</p> |

| | |
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| | 0.4-1.6 ha, capable of producing premises of 2787 to 11,613 sqm for leasehold, long leasehold (125 years) or freehold basis. These have attracted only modest interest to date. |
| Constraints | <ul style="list-style-type: none"> • Woodland- small section to the northern boundary • Woodland also adjacent (east) to the Area as part of the Red Scar and Tun Brook Woods SSSI • Some Flood Risk • An overhead power cable currently runs across the site towards the southern boundary. • In addition, a foul sewer and culverted watercourse are known to run across the site |
| Comments | Access in place |
| Likely development potential | Anticipated occupiers would be mid-sized logistics operators |
| Potential guidance market segment uses | <ul style="list-style-type: none"> • Transport and Storage |
| Attractiveness to Growth Sectors | No |
| Serviced | Access in place |



| | |
|----------------------------------|---|
| Site Name | Millennium City Park |
| Policy Reference | EP1.5 |
| Owner | <ul style="list-style-type: none"> • Site to south west owned by MM Acquisitions • Site to the north east owned by Barnfield Construction |
| Agent | |
| Size, ha | 4.16 – But only 1.65 ha remaining after current consents |
| Market Availability | |
| Planning Status (Allocated Uses) | Allocated for B1(b), B2, B8 uses in the Local Plan 2012-2026 |
| Proposal | <p><i>South West Site</i> 14/0812 – Commercial vehicle storage, maintenance and sales, erection of workshop and office buildings. Development underway/complete. Site area take up of 2.77 ha – 0.85 ha remaining on this site</p> <p><i>North East Site</i> Small 0.8 ha site north of Self Storage. No identified plans</p> |
| Constraints | <p><i>South West Site</i></p> <ul style="list-style-type: none"> • Remaining land is backland • Trees onsite <p><i>North East Site</i></p> <ul style="list-style-type: none"> • Small site comprising mound covered with trees |
| Comments | Subject to addressing constraints, North East Site could support a further small B-Class development, Backland in South West may not be developable. |
| Likely development potential | B1(a), B1(c), B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage – But remaining plots too small to support larger logistics options |

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|----------|---|
| | <ul style="list-style-type: none">• Construction• Information and Communications• Administrative and Support• Creative and Digital• Finance and Professional• Health |
| Serviced | No |



| | |
|----------------------------------|---|
| Site Name | Site at Junction 31A M6 West Loop |
| Policy Reference | EP1.6 |
| Owner | Inchcape Estates |
| Agent | GVA |
| Size, ha | 2.37 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for B1(b), B1(c) uses in the Local Plan 2012-2026 |
| Proposal | 06/2017/0440 – Consented for a 5,826 sqm car showroom |
| Constraints | <ul style="list-style-type: none"> • Trees on site • Drainage ditches are present within Area 1. • Existing and abandoned electricity cables located across the site • Under development for non B-Class uses. |
| Comments | Under development for car showroom for Hunters Jaguar Landrover. |
| Likely development potential | Sui Generis car sales |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage – But remaining plots too small to support larger logistics options • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | No |



| | |
|----------------------------------|---|
| Site Name | Land North of Eastway (formerly Broughton Business Park) |
| Policy Reference | EP1.7 |
| Owner | Homes and Community Agency – Storey Homes now preferred developer |
| Agent | Hollins Strategic Land |
| Size, ha | 2.10 |
| Market Availability | |
| Planning Status (Allocated Uses) | Allocated for B1, B2, B8 uses in Policy EP1 of the Local Plan 2012 – 2026. |
| Proposal | <p>06/2013/0349 granted outline permission for a much larger site of 25.9ha of land for a mixed use development comprising of residential development (up to 300 dwellings), 2.1ha of employment land (Class B1(b); B1(c); B2 and B8), 0.7ha mixed use centre (including Class A1-A5 local shops, services, food and drink; Class B1(b) employment; Class C2/C3 residential care / nursery home; and Class D1 local community facilities), open space provision, landscaping and associated infrastructure, internal roads and footways, access junction and new link road between Eastway and D'urton Lane</p> <p>06/2015/0968 - Reserved matters planning consent granted mixed use centre comprised of Class A1-A5 local shops, services, food and drink; Class B1(b) employment; and Class D1 local community facilities.</p> |
| Constraints | <ul style="list-style-type: none"> • Ancient Monument to the southern edge of the site – Cromwell's Mound Civil War Fieldwork • Trees on site. |
| Comments | Smaller business uses likely after housing delivered |
| Likely development potential | B1(a), B1(c), B2 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Information and Communications |

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| | <ul style="list-style-type: none">• Administrative and Support• Creative and Digital• Finance and Professional• Health. |
| Serviced | No |

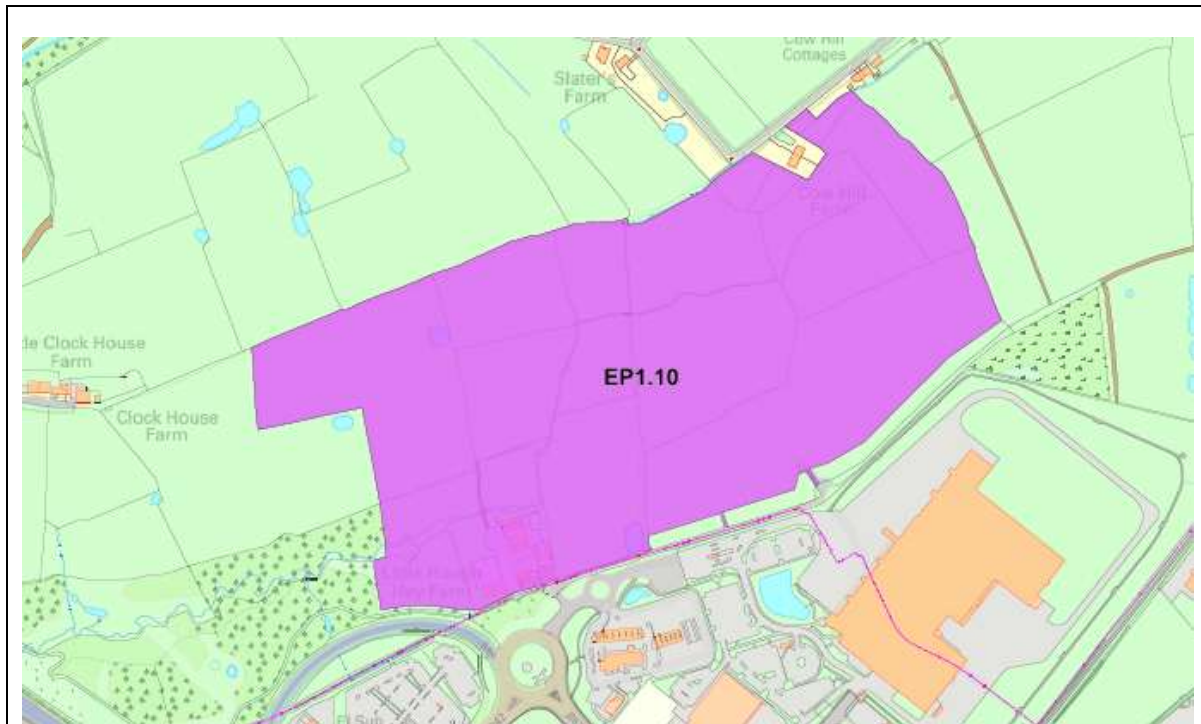


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|----------------------------------|---|
| Site Name | Deepdale Street / Fletcher Road |
| Policy Reference | EP1.8 |
| Owner | Gafoor Poultry Products (Unclear if they are freeholder or long leaseholder) |
| Agent | - |
| Size, ha | 0.49 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for B1, B2, B8 uses in Policy EP1 of the Local Plan 2012 – 2026. |
| Proposal | <p>06/2016/0100 gave permission for the erection of a two-storey building on the western strip of this site (taking up approximately 0.29ha) for B2 use to the side of the existing poultry processing plant and extension of the service yard for Gafoor Poultry Products Ltd. This has now been built out.</p> <p>06/2016/0208 gave permission for Trampower Ltd to re-instate the former rail line, including the erection of masts and overhead cables, construction of station platform building, tram shed/storage building, 2.4m high fencing and gates, associated parking, landscaping and hard surfacing to create a Tramway Pilot Project. This proposal involves an access strip which runs through the western edge of site EP1.8 reducing the available allocation area by approximately 0.01ha. No commencement.</p> |
| Constraints | <ul style="list-style-type: none"> Irregular shape |
| Comments | Land appears to be in use for parking by Gafoor. No identified development plan. Assumed any development |

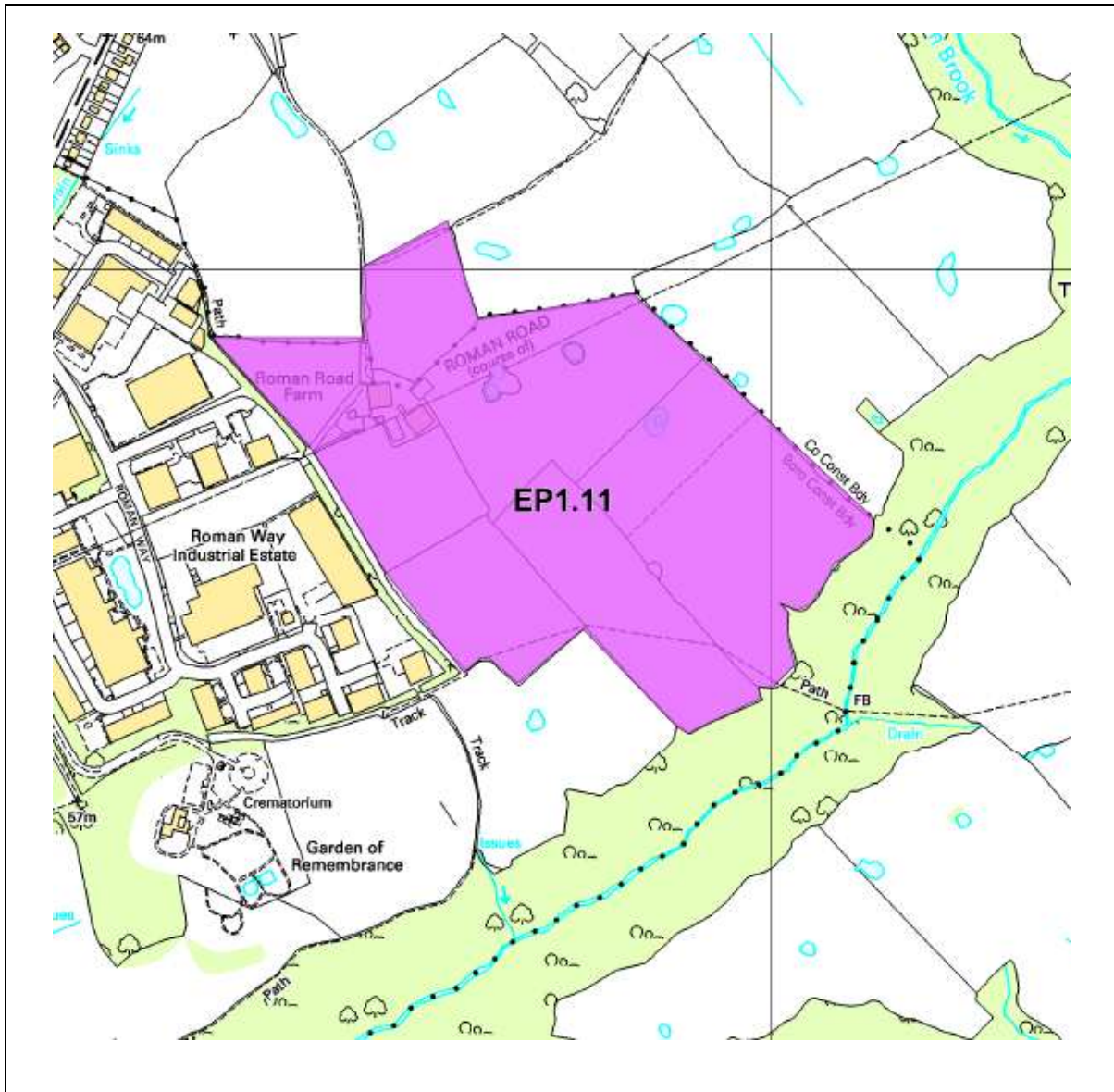
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| | likely to be for expansion of adjacent company. However, site could be separated and made available for independent development. |
| Likely development potential | B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none">• Advanced Manufacturing• Construction• Transport and Storage – But remaining plot too small to support larger logistics options |
| Serviced | No |



| | |
|----------------------------------|---|
| Site Name | Riversway |
| Policy Reference | EP1.9 |
| Owner | Unknown |
| Agent | - |
| Size, ha | 1.37- of which only 0.35 ha remains |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for B1, B2, B8 uses in Policy EP1 of the Local Plan 2012 – 2026. |
| Proposal | None |
| Constraints | Trees on site |
| Comments | <p><i>The northern site</i> – The southern strip of this site has already been developed for an extension to the existing engine sheds.</p> <p><i>The southern site</i> – This site has been developed by Mulberry homes for residential.</p> <p>There is only 0.35ha left undeveloped as modest expansion site on Chain Caul Road.</p> |
| Likely development potential | Would suit small B1(c) light industrial operator |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> Advanced Manufacturing |
| Serviced | Yes |



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|----------------------------------|--|
| Site Name | Preston East Junction 31A M6 |
| Policy Reference | EP1.10 |
| Owner | Homes and Community Agency |
| Agent | - |
| Size, ha | 25.50 – But net developable area may only be 7.08 ha according to HCA |
| Market Availability | To be marketed for freehold disposal |
| Planning Status (Allocated Uses) | Allocated for B2, B8 in the Local Plan 2012-2026 |
| Proposal | No current or previous planning applications / permissions HCA indicate they will be advertising site for freehold disposal to developer for B-Class uses in 2017, with an intention to dispose by 2018. |
| Constraints | <ul style="list-style-type: none"> Existing ponds on site. Trees and hedgerows on site An overhead electric cable runs diagonally across the site. Lies entirely within a low-level flood risk zone. |
| Comments | Vehicle access to the site is presumed to be provided via the provision of a new arm at the existing roundabout junction Currently under agricultural management pending any development. |
| Likely development potential | Site would suit larger B2/B8 options similar to adjacent James Hall facility. |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> Advanced Manufacturing Transport and Storage |
| Serviced | No |

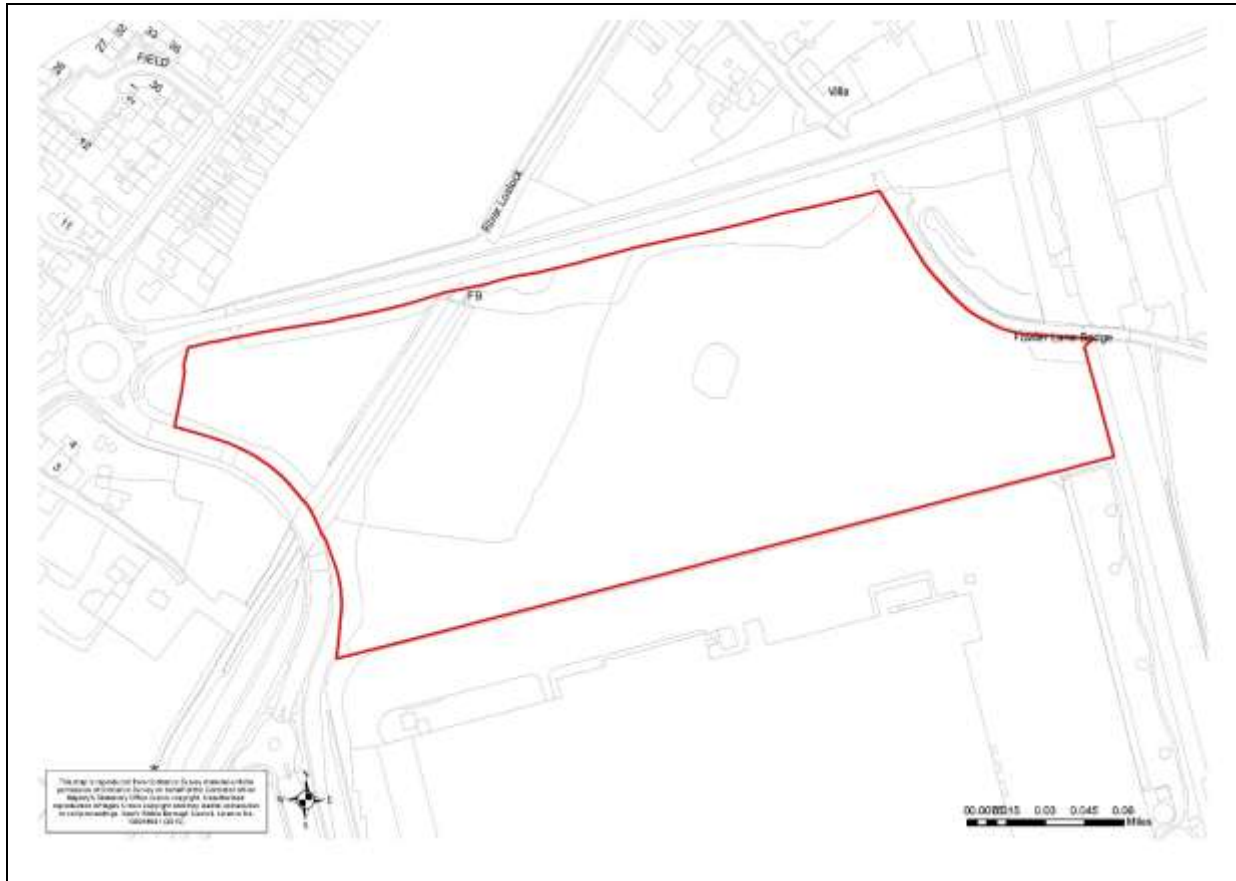


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| Site Name | Roman Road Farm |
| Policy Reference | EP1.11 |
| Owner | Private Individuals |
| Agent | - |
| Size, ha | 24.94 |
| Market Availability | Potentially available |
| Planning Status (Allocated Uses) | Allocated for B2, B8 use in the Local Plan 2012-2026 |
| Proposal | No planning applications / permissions |
| Constraints | <ul style="list-style-type: none"> • Course of an old roman road runs through the northern section of the site • The access route into the development site itself is currently unclear, potentially via existing Roman Way industrial estate • Potential habitat for bats and birds within the site • Trees and hedgerows on site • Lies within close proximity to Tun Brook Woods SSSI. |
| Comments | Part of active agricultural business. Owner has no plans to develop but is willing to discuss offers. |

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| Likely development potential | If developed would favour smaller B1(c), B2, B8 units, comparable to those in adjacent Roman Way. Access issues mean that larger logistics or high-profile offices unlikely here. |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none">• Advanced Manufacturing• Construction• Transport and Storage, smaller options only |
| Serviced | No |

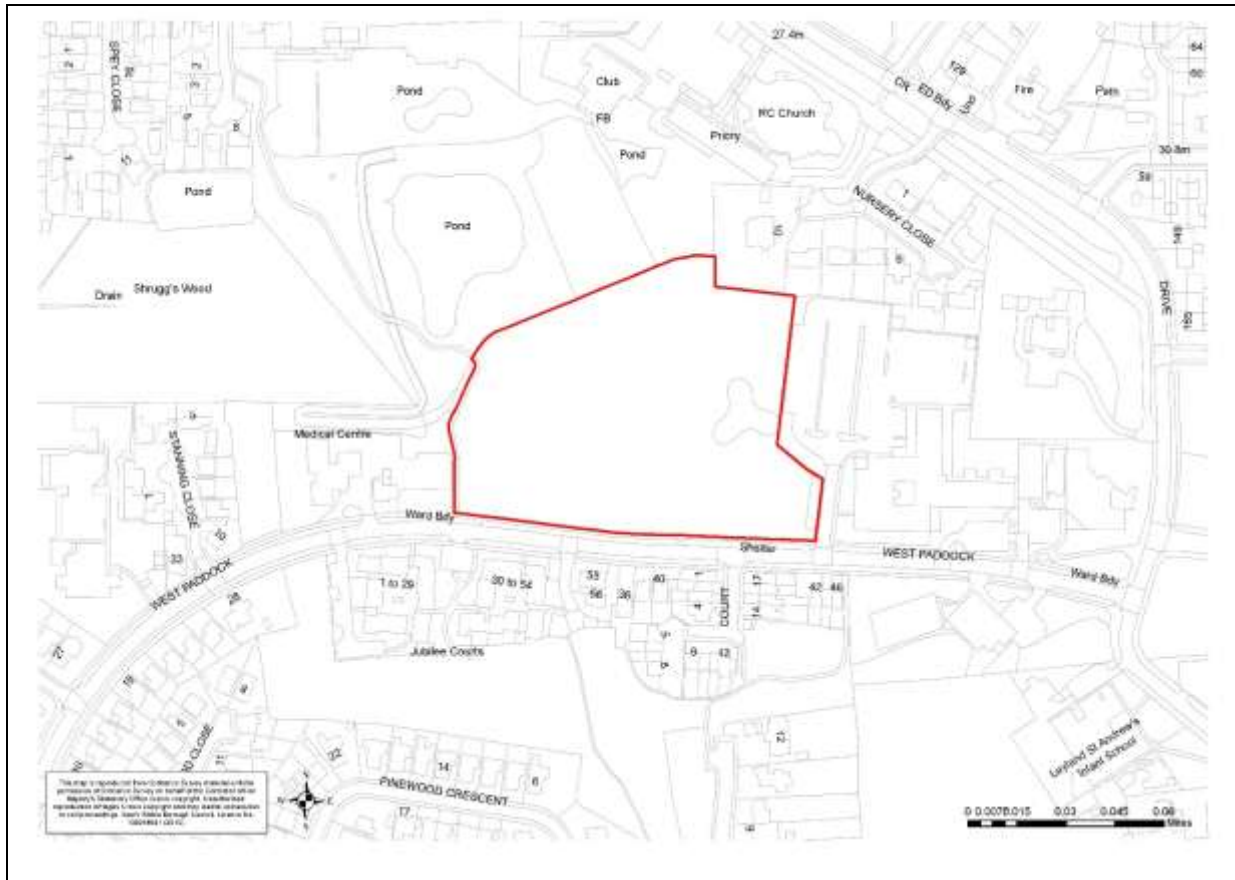
Appendix 7 – South Ribble Employment Site Proformas

Local Plan Sites



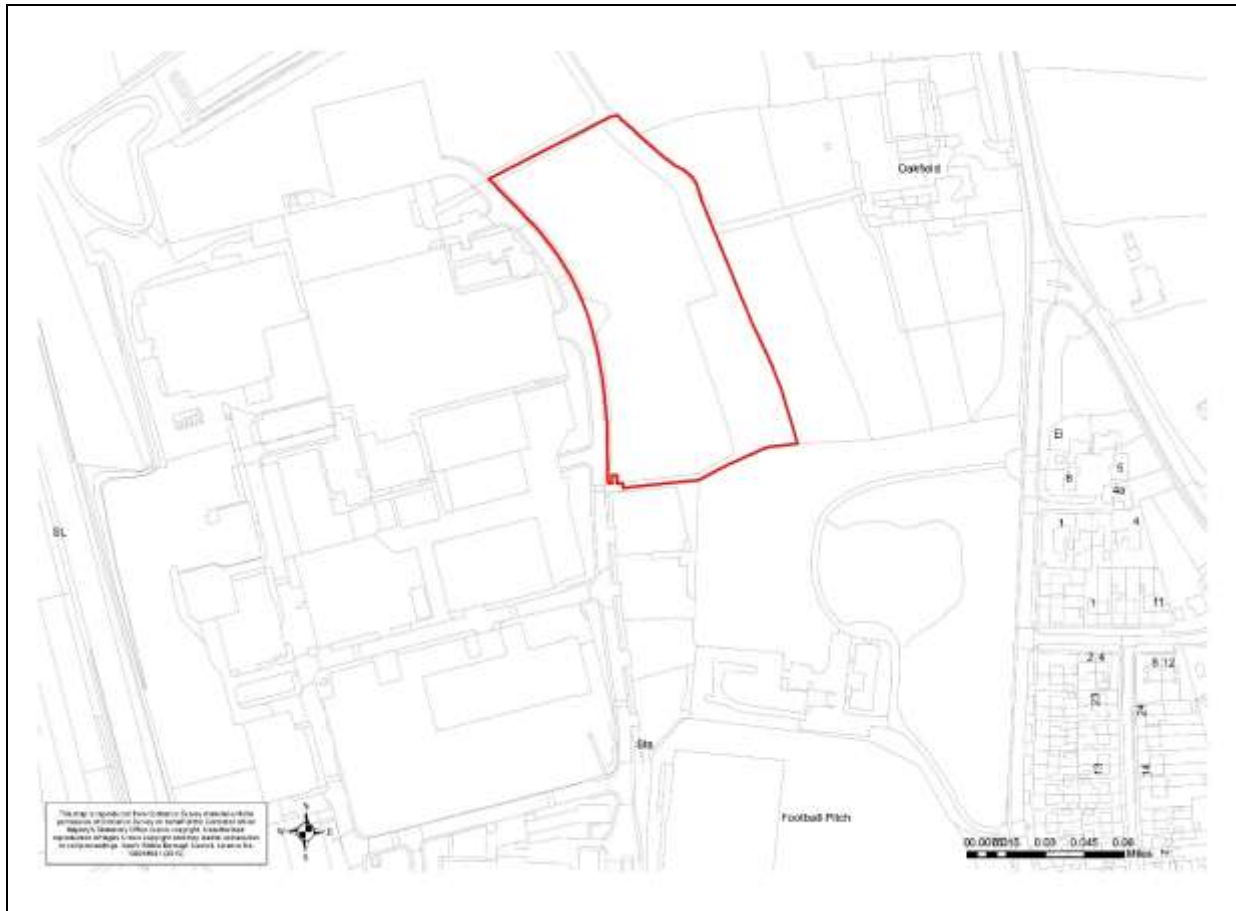
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| Site Name | North of Lancashire Business Park, Farington |
| Policy Reference | E1(d) |
| Owner | Leyland Trucks (Paccar) |
| Agent | - |
| Size, ha | 9.20 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for employment uses in Policy E1 – ‘Allocation of Employment Land’, of the Local Plan |
| Proposal | Ownership means that it is likely to be held as expansion land for Leyland Trucks. However, the land is outside of Leyland Trucks’ secure site and could be made available to other occupiers. Any development here would be separated from the rest of Lancashire (Enterprises) Business Park, Farington by the Leyland Trucks facility. |
| Constraints | <ul style="list-style-type: none"> • Trees on site • River Lostock crosses the west of the site, possible flood risk in places • Small pond on site. |
| Comments | The location represents a key frontage site for the wider Business Park with A582 frontage. Its strategic position, while already strong will benefit from a number of the infrastructure improvements of City Deal including the |

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| | Penwortham Bypass, improvements around the A582/A6/M65/M6 junctions and ultimately the Western Distributor Road. This makes it a key site for South Ribble. |
| Likely development potential | B2, B8 but with the possibility of B1(a) frontage offices |
| Attractiveness to Growth Sectors | <p>The links to the adjacent Leyland Trucks (Paccar) site make it an obvious location for the Automotive sector. However, in practice the land could accommodate good quality production facilities for the Advanced Manufacturing sector as well. In addition, the high prominence of this site and its strategic accessibility to both the motorways and Preston could make it a viable location for office uses:</p> <ul style="list-style-type: none"> • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health. <p>Local scale transport and storage would also be appropriate here</p> |
| Serviced | No |



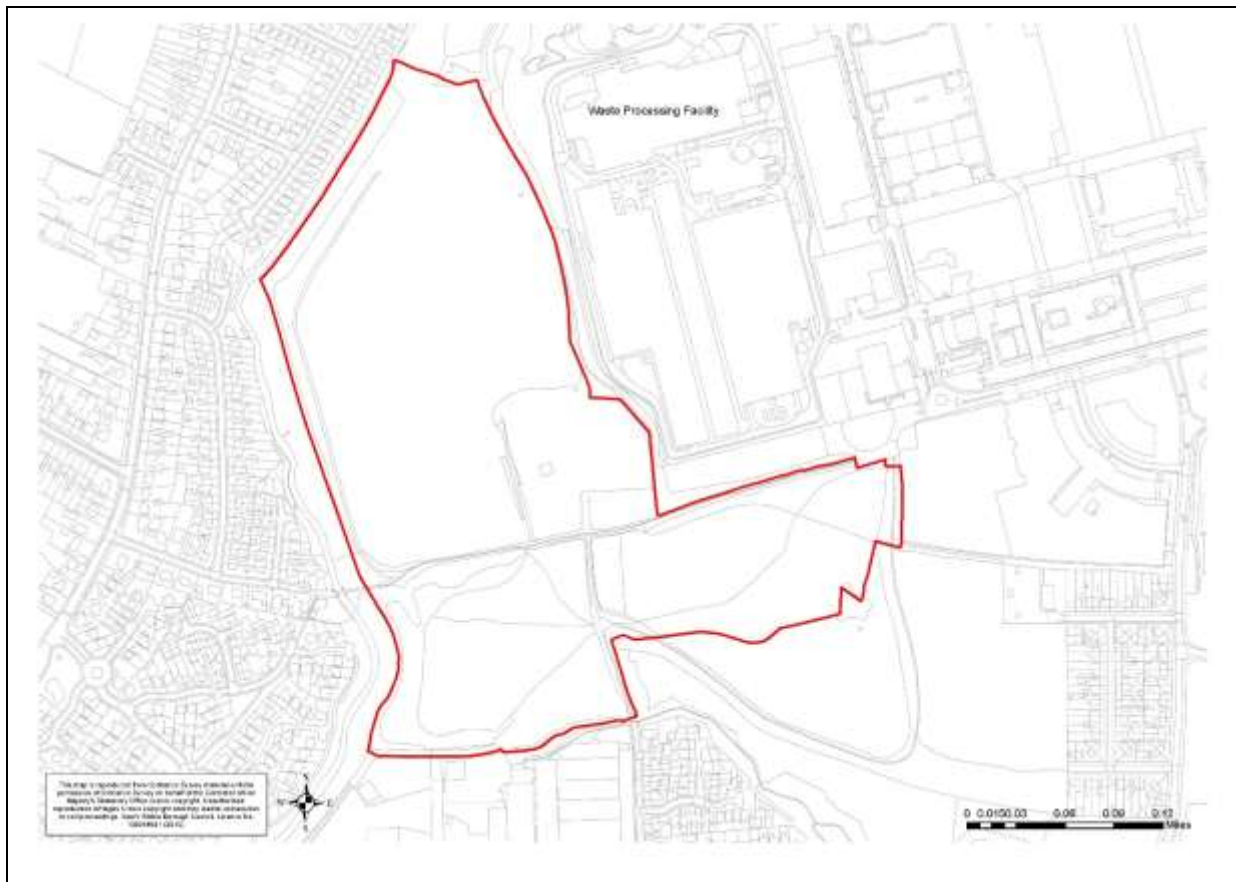
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| Site Name | West Paddock, Leyland |
| Policy Reference | E1(e) |
| Owner | South Ribble Borough Council |
| Agent | - |
| Size, ha | 1.94 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for employment uses in Policy E1 – ‘Allocation of Employment Land’, of the Local Plan |
| Proposal | <p>It is anticipated that around a third of the site should be retained for open space</p> <p>The Council has previously considered developing incubation units here, linked to the adjacent Civic Centre. At the time of writing the Council has not identified any funding or development partners to progress this</p> |
| Constraints | <ul style="list-style-type: none"> • Trees on site • Culvert crosses the site • Public footpath crosses the edge of the site • Other woodland (Shrugg’s Wood) and recreation uses adjacent • In a largely residential area. |
| Comments | <p>Adjacent to the Council offices but otherwise separate from the other Employment Areas of South. The location will enjoy some benefits from City Deal infrastructure improvements, in terms of access from the west and north but the site remains most likely to serve local business</p> |

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| | needs rather than inward investors. Land used informally for recreation. |
| Likely development potential | B1(a)/B1(c) |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced manufacturing • Construction • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health. |
| Serviced | No |



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| Site Name | Land Adjacent to Leyland Business Park, Farington |
| Policy Reference | E1(f) |
| Owner | Ainscough Properties own. Land let to Ainscough Cranes for 14 years from 2010. |
| Agent | - |
| Size, ha | 2.10 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for employment uses in Policy E1 – ‘Allocation of Employment Land’ of the Local Plan |
| Proposal | Currently in use for open storage and the parking of cranes. |
| Constraints | - |
| Comments | Over the longer term however, this represents a significant opportunity to grow and expand this successful local business park. Ainscough Properties have invested extensively in the Business Park in recent years and will continue to do so. In particular there will be a long term need to replace some of the older properties on Leyland Business Park (ex. Leyland Motors, etc. stock), which are nearing the end of their economic lives, with modern accommodation which could extend to include new build investment. |
| Likely development potential | B1(c), B2, B8 |
| Attractiveness to Growth Sectors | Leyland Business Park is an established location for the |

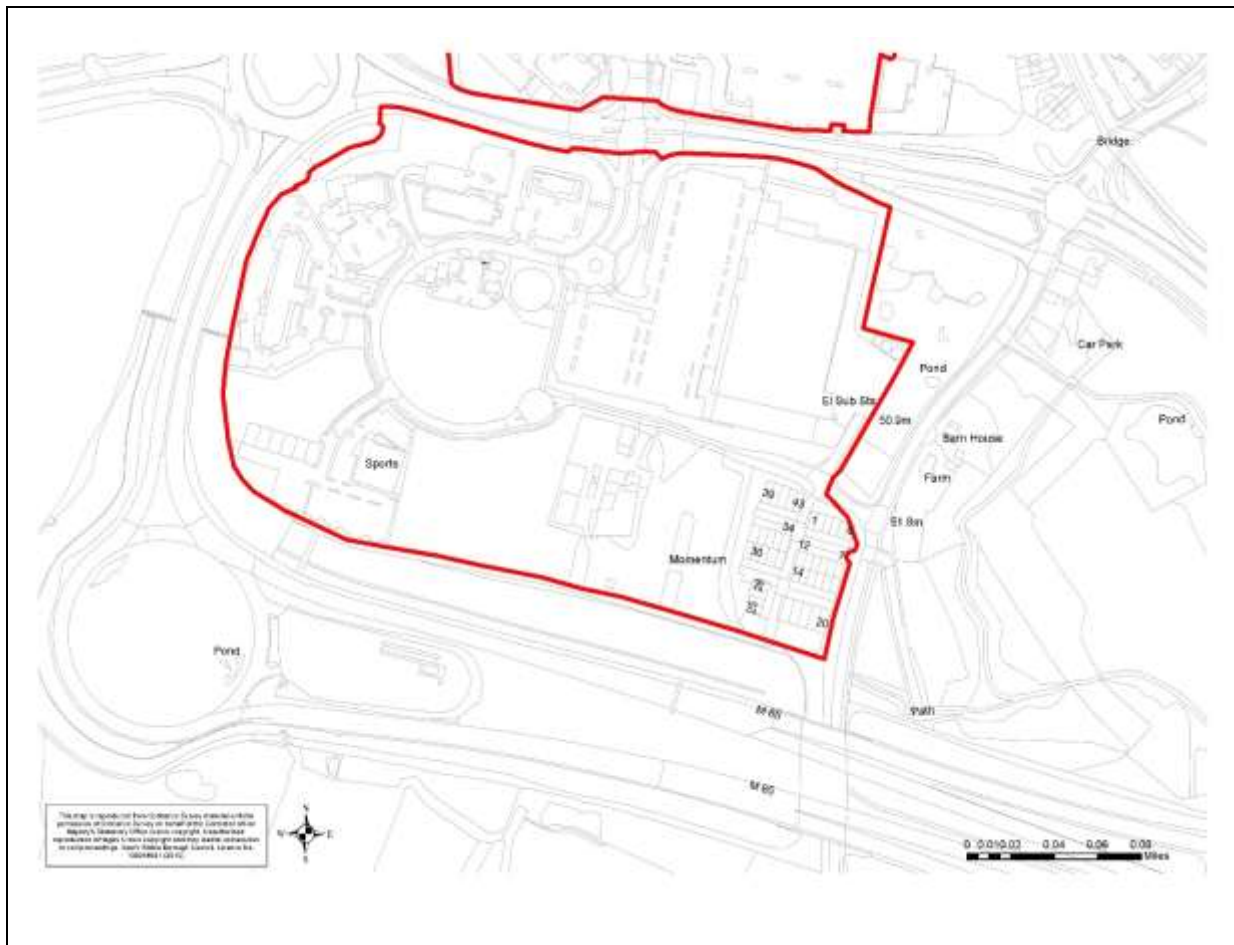
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| | Automotive sector and particularly construction given its current ownership of, and use by, Ainscough. The land could also accommodate good quality production facilities for the Advanced Manufacturing sector. |
| Serviced | No |



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|----------------------------------|---|
| Site Name | Farington Hall Estate, West of Lancashire Business Park, Farington |
| Policy Reference | E1(g) |
| Owner | Bracken House Properties |
| Agent | - |
| Size, ha | 22.20 |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Allocated for employment uses in Policy E1 – ‘Allocation of Employment Land’ of the Local Plan |
| Proposal | Bracken House Properties are looking at the redevelopment of the land for a mixture of employment and residential uses. Negotiations have also taken place between the developer and the owners of Lancashire (Enterprises) Business Park, Farington over the access to the employment site from Centurion Way. Lancashire County Council does not support a route running through the site and would wish to see traffic movements controlled. No timetable for bringing this scheme forward. |
| Constraints | <ul style="list-style-type: none"> • Full access arrangements to be agreed • Trees on site • Footpaths cross the site • Area of archaeological interest on the site (around Lower Farington Hall) • Previously a landfill site for inert waste, likely contamination |

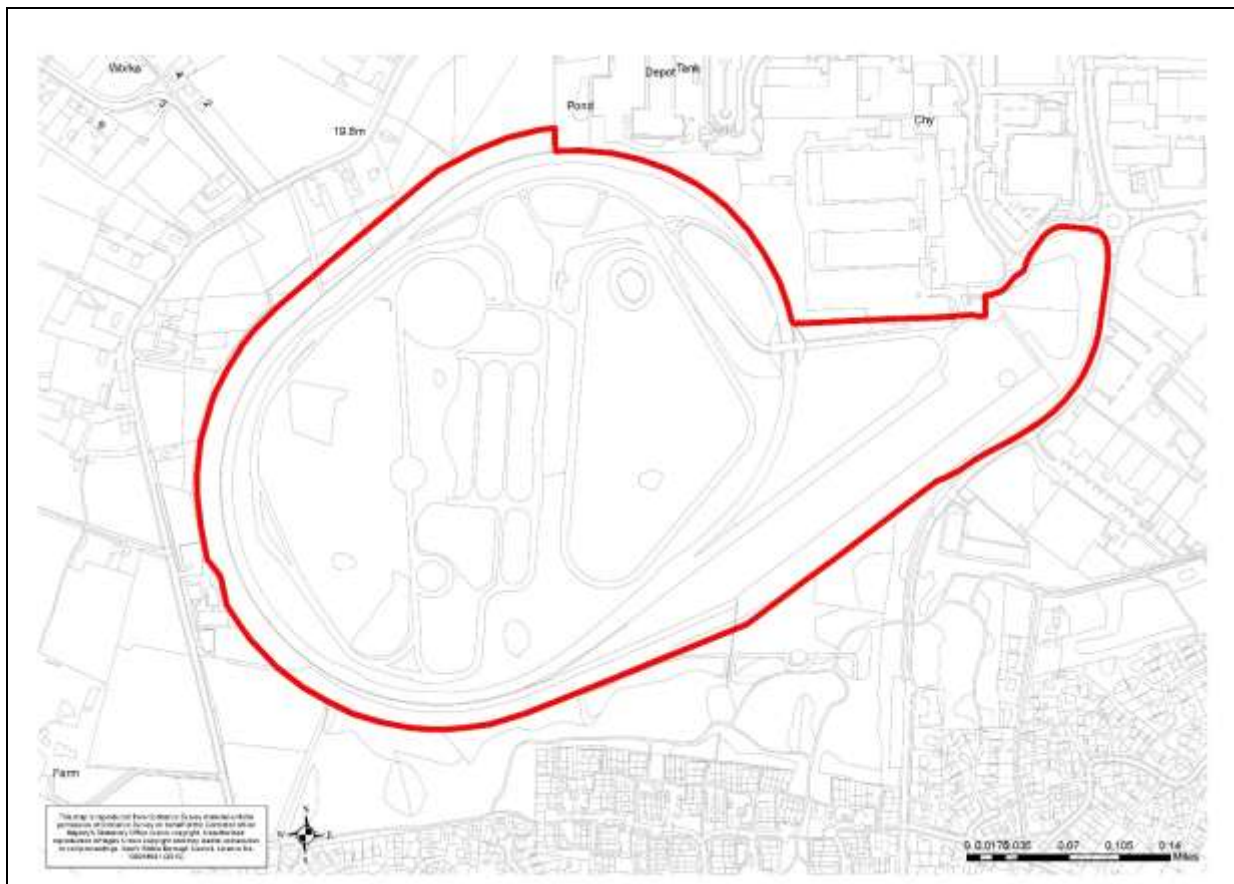
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| | <ul style="list-style-type: none"> • River Lostock adjacent, possible flood risk in places • Waste processing facilities to the east. |
| Comments | <p>Site represents a significant expansion opportunity for Emp. Area 10: Lancashire (Enterprises) Business Park, Farington. Subject to addressing local access constraints it will be well placed access the strategic road network north to the A582. Its strategic position, will benefit from a number of the infrastructure improvements of City Deal including the Penwortham Bypass, improvements around the A582/A6/M65/M6 junctions and ultimately the Western Distributor Road.</p> |
| Likely development potential | B1, B2, B8 |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing and associated Aerospace/Automotive • Transport and Storage (although reflecting recent experience marketing logistics premises at the adjacent Lancashire (Enterprises) Business Park, Farington strategic operators may still feel this location is too far from the motorway junctions) • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health <p>The Construction and Energy sectors may find backland sites here amenable, particularly for environmentally sensitive operations that could benefit from being away from sensitive uses.</p> |
| Serviced | No |

Additional Local Employment Land



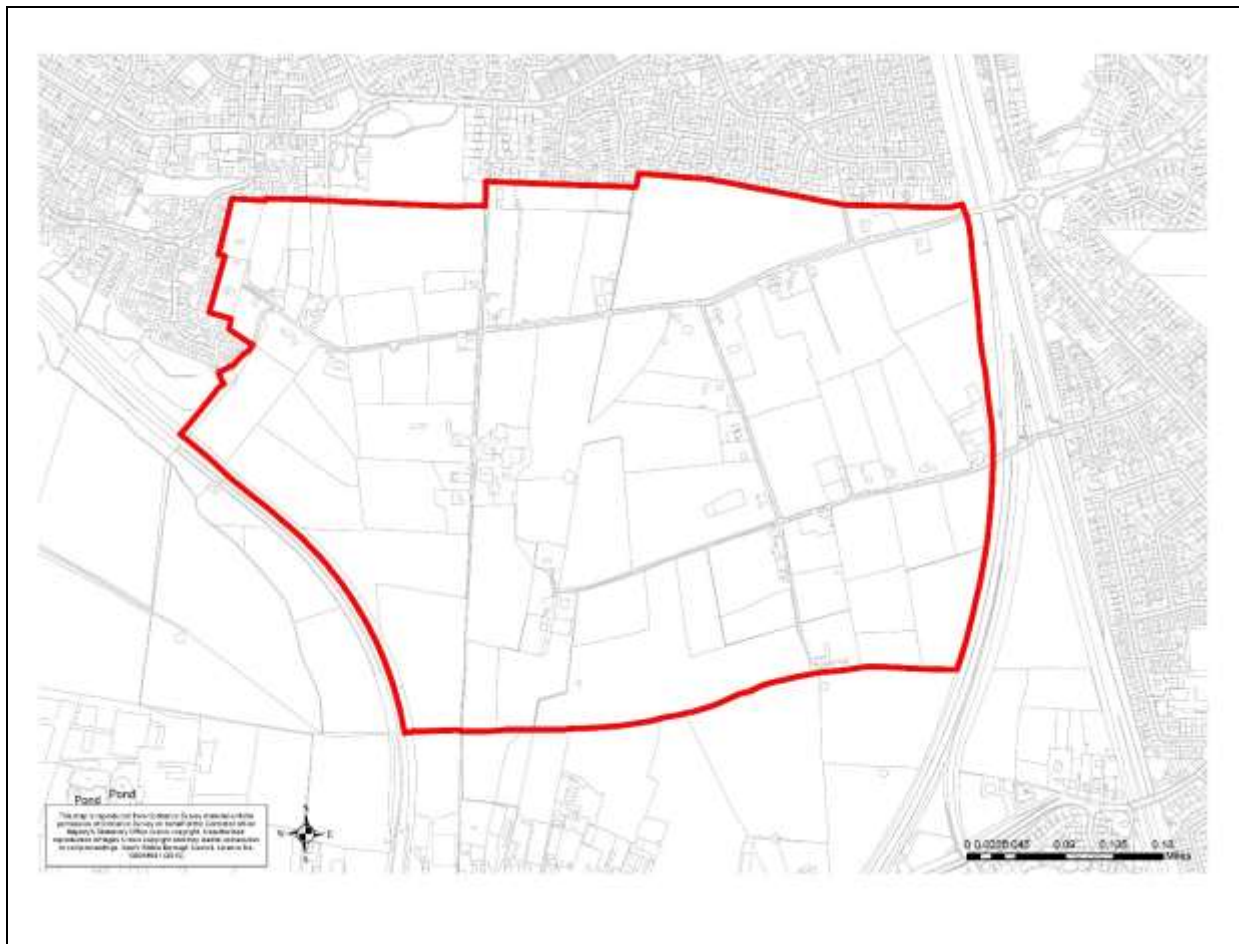
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| Site Name | South Rings, Cuerden |
| Policy Reference | B3 |
| Owner | Multiple owners including Places for People, Roundhouse Momentum Development, Other private individuals |
| Agent | Momentum, Eckersley, Places for People |
| Size, ha | Originally 12.55, reduced to 11.05 by completions since 2015 |
| Market Availability | Primarily not available |
| Planning Status (Allocated Uses) | B1, B2, B8 – with two main consents for: <ul style="list-style-type: none"> • (App. No. 07/2014/1067/REM) for the erection of 6, B1 and B8 starter units together with a D2 Health and Fitness Club (929 sqm) from Places for People • (App. No. 07/2014/0669) for 43 B1, B2, B8 units and associated parking. Development activity proceeding on Plot 7000 for a small business scheme of 43 micro business units (Momentum Business Centre). |
| Proposal | Remaining land is split into three main plots south of Craven Drive/Nook Lane: <p><i>West Plot (5000)</i> – Six B1 and B8 starter units completed and being marketed for occupation. D2 Health and Fitness Club (929 sqm) from Places for People, also now complete and operating as Places Gym. Overall some 0.75 ha has been completed here</p> <p>Plans for a 3,000 sqm office at West Plot (5000), South</p> |

| | |
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| | <p>Rings, for the future expansion of Places for People, have now been shelved and are unlikely to proceed.</p> <p><i>Central Plot (6000)</i> - Split into three plots of 0.26-0.54 ha. All were understood to have been sold to private parties, but no development plans have emerged to date.</p> <p><i>East Plot (7000, separated from other plots by J. Sharples Plant and Machinery dealers)</i> – Now developed for 43 micro business units as Momentum Business Centre). Overall some 0.75 ha has been completed here</p> <p><i>Land north of Craven Drive in South Rings Business Park</i> – Divided into a maximum of 24 development plots. Six developed and let at present. Owners now understood to be seeking an industrial development on this site, to comprise small workshop units of around 90 sqm each and comparable to that already delivered at the adjacent Momentum Business Centre on East Plot (7000).</p> |
| Constraints | <ul style="list-style-type: none"> • Pylons cross south west of the site • Trees on site • Public footpath crosses the site. |
| Comments | - |
| Likely development potential | Primarily B1(c) light industrial, B2 and some B8 storage. Assumed minimal further B1(a) offices |
| Attractiveness to Growth Sectors | <ul style="list-style-type: none"> • Advanced Manufacturing • Transport and Storage • Information and Communications • Administrative and Support • Creative and Digital • Finance and Professional • Health |
| Serviced | Yes (part) |



| | |
|----------------------------------|---|
| Site Name | Moss Side Test Track, Leyland (Doll Lane) |
| Policy Reference | C2 |
| Owner | Primarily Pilgrim Technology and South Ribble Borough Council |
| Agent | Property Capital are development partner |
| Size, ha | 6.08 based on Development Brief |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Identified for a mix of uses, including B1, B2, B8 uses in the Local Plan, subject to planning and an agreed masterplan |
| Proposal | <p>Property Capital has been the development partner for the Moss Side Test Track site since March 2015. Over 2016/17, the company submitted a Masterplan for the site, which it refers to as Doll Lane, to South Ribble Borough Council. That Masterplan proposes a mixed-use scheme for the Test Track, and surrounding land, comprising housing in eight main neighbourhood areas, two retail centres, greenspace and an area of employment land fronting Titan Way and linking to the existing Moss Side Industrial Estate. Access would be off Longmeanygate in the north and west, Paradise Lane in the east and Titan Way for the employment element.</p> <p>Property Capital have been market testing the employment elements of site through a Central Lancashire agent for the last 6 months. That agent will not formally report back on demand till July but there is understood to be a good level of interest from county/regional industrial and warehouse occupiers</p> |

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| | <p>seeking modern, design and build premises. The main concerns now are access, both from the site and through to the strategic road network, and competition from the Cuerden Strategic Site.</p> <p>The stated timetable would be for a planning application in spring 2017 and, subject to planning, construction to commence by late 2017/early 2018. However, at the time of writing, there was strong local opposition to the scheme and a decision on the latest Masterplan was deferred at Council Committee, with a general view given that the earlier site Masterplan, 'Development Brief for the Leyland Test Track Redevelopment Site', still represents the preferred way forward. That document identifies the following development mix:</p> <ul style="list-style-type: none"> • 23.43 ha of land for the provision of approximately 750 residential units • 0.97 ha of land for a Neighbourhood Centre which could include a mix of uses, including an A1 shop, restaurant, public house and a newsagent • 6.08 ha of B1/B2/B8 employment uses, located adjacent to the existing Emp. Area 8: Aston Moss Employment Area and accessed from existing estate roads. This is expected to comprise: <ul style="list-style-type: none"> ○ 5,000 sqm of B1 ○ 15,000 sqm of B2 ○ 8,000 sqm of B8. <p>Following this, Property Capital have yet to decide a way forward and what modifications might be made to the Masterplan before it moves to seek planning consent. Property Capital are concerned that the level of local opposition will make agreeing any scheme impossible.</p> |
| Constraints | <ul style="list-style-type: none"> • Abnormal costs associated with transport and access • Strong local opposition • Various structures/facilities to be demolished • Woodlands and hedgerows on site • Ponds on site • Housing adjacent • Small scale land contamination in some areas |
| Comments | - |
| Likely development potential | The new development may accommodate some office uses but is likely to be B1(c)/B2 led. |
| Attractiveness to Growth Sectors | <p>The adjacent employment areas are already established locations for Advanced Manufacturing and high tech industrial uses. Hence likely growth sectors to be accommodated here may include:</p> <ul style="list-style-type: none"> • Energy • Advanced manufacturing • Aerospace • Automotive. <p>A modest element of Transport and Storage may also be accommodated given this location's relative prominence on the strategic transport network.</p> |
| Serviced | No |



| | |
|----------------------------------|--|
| Site Name | Pickering's Farm, Bee Lane, Penwortham |
| Policy Reference | C1 |
| Owner | Homes and Communities Agency plus multiple private owners |
| Agent | Various including Regeneris, Lea Hough, Arup |
| Size, ha | 0.45 according to most recent HCA estimate |
| Market Availability | Not available |
| Planning Status (Allocated Uses) | Identified for a housing-led scheme but also including B1, B2, B8 uses in the Local Plan, subject to planning and an agreed masterplan |
| Proposal | <p>Broad outlines of development approach agreed, and HCA has an approved disposal strategy to a consortium including Taylor Wimpey as main housebuilder. Disposal is expected in 2018 with major development commencement by 2021 at the latest.</p> <p>Employment element is subject to planning and further negotiation, but HCA estimate is for 1760 sqm of office led property.</p> |
| Constraints | <ul style="list-style-type: none"> • Trees and hedgerows on site • Existing farms on site • Housing adjacent |
| Comments | Site will benefit from City Deal investment in surrounding major road infrastructure. |

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| | <p>The HCA have a second landholding, off Ermine Lane, to the south of the Leyland settlement area. Which they identify as having employment potential as the 'South Leyland Employment Area'. However, this land is safeguarded under Policy G3 – Safeguarded Land for Future Development of the South Ribble Site Allocations DPD (Site S5 Land off Emnie Lane, Leyland). That policy ensures that the land remains safeguarded and not designated for any specific purpose within the Plan period. Future review work will have to clarify when the site should come forward and what mix of uses it could be best developed for.</p> |
| Likely development potential | Expected to be an office led scheme |
| Attractiveness to Growth Sectors | <p>Site favours office based sectors unlikely to have large land or premises requirements and which may wish a location close to the larger service sector market of Preston City Centre, specifically:</p> <ul style="list-style-type: none"> • Information and Communications • Administrative and Support • Creative and Digital • Health • Finance and Professional. |
| Serviced | No |

Appendix 8 – Site Scoring System

| | | |
|--------------------------|--|--|
| Site Location and Access | Proximity to strategic highway network | <ul style="list-style-type: none"> • Site adjacent to primary route (motorway, strategic highways network route) - M6, M61, M65, M55, A6 junction – score 10 • Site 0.5 km from primary route – score 9 • Site 1.0 km from primary route – score 8 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary route scores zero. |
| | Proximity to key local routes | <p>Proximity to key county routes (A49, A59, A583, A582):</p> <ul style="list-style-type: none"> • Site within 1.0 km from A49, A59, A583, A582 junction – score 10 • Site within 5.0 km from A49, A59, A583, A582 junction – score 6 • Site within 10.0 km from A49, A59, A583, A582 junction – score 3 • Site more than 10.0 km from A49, A59, A583, A582 junction – score 0. |
| | Prominence | <ul style="list-style-type: none"> • Site adjacent to, and visible from M6, M61, M65, M55, A6 – score 10/9 • Site adjacent to, and visible from other dual carriageway – score 8/7 • Site adjacent to, and visible from other A road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in ‘backlands’ – score 2/1/0 |
| | Public Transport | <ul style="list-style-type: none"> • Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0 |
| Planning Status | | <ul style="list-style-type: none"> • If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1 |
| Site Conditions | Services Availability | <ul style="list-style-type: none"> • If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0 |
| | Constraints | <p>May be physical (including access), planning, or legal</p> <p>Reduce score by 2 for each constraint</p> <p>If there are none – score 10.</p> |
| | Environmental Setting | <p>Subjective, score 0 to 10, examples:</p> <ul style="list-style-type: none"> • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2 |
| | Flexibility | <p>Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers</p> <p>Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.</p> |
| Site Availability | | <ul style="list-style-type: none"> • Site available to develop within 0-1 year – score 10 • Site available to develop within 1-5 years – score 6 • Site available to develop 6-10 years – score 3 • Site available to develop 10+ years – score 0 |

Source: BE Group, 2017

Appendix 9 – Site Scoring Results

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|--|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|----------------------|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| CHORLEY | | | | | | | | | | | | | | | | |
| EP1.13 | Southern Commercial, Buckshaw Village | 3.16 | 9 | 6 | 9 | 10 | 4 | 7 | 8 | 9 | 9 | 10 | 81 | 42 | B1(a), B1(c), B2, B8 | Development viability on southern site |
| EP1.11 | The Revolution, Buckshaw Avenue, Buckshaw Village | 3.26 | 9 | 6 | 9 | 10 | 4 | 0 | 10 | 10 | 9 | 10 | 77 | 43 | B2, B8 | None |
| EP1.12 | Group 1, Buckshaw Village | 2.17 | 9 | 6 | 9 | 10 | 4 | 0 | 10 | 9 | 9 | 10 | 76 | 42 | B1(c), B2 | None |
| EP1.8 | Lyons Lane Mill, Townley Street Chorley | 0.3 | 9 | 6 | 9 | 10 | 4 | 10 | 10 | 6 | 4 | 6 | 74 | 34 | B1(c), B2 | None |
| EP1.5 | Euxton Lane, Chorley | 8.8 | 10 | 6 | 8 | 10 | 10 | 0 | 2 | 9 | 8 | 10 | 73 | 41 | B1(a), B1(b), B1(c) | Access to the remaining allocated site needs to be provided. Site reprofiling required Pond on site, to be retained Multiple ecological issues to be mitigated |
| Plan App.4 | Unit 1, Blainscough Works, Blainscough, Coppull | 0.5 | 1 | 10 | 3 | 5 | 10 | 10 | 8 | 2 | 7 | 6 | 62 | 23 | B1(c) | Footpath No 99 Public Right of Way |
| Plan App.6 | Twin Lakes Industrial Estate, Brickcroft Lane, Croston | 1.9 | 0 | 6 | 3 | 10 | 10 | 7 | 8 | 3 | 7 | 6 | 60 | 19 | B1(c) | Part of site is in Flood Zone 2. Much of the site is within 250m buffer of landfill. |
| EP1.9 | Woodlands Centre, Southport Road, Chorley | 0.8 | 8 | 6 | 6 | 10 | 4 | 0 | 6 | 7 | 4 | 6 | 57 | 31 | B1(a) | Within the employment allocation there is a Tree Preservation Order (TPO6 (23 April 1992)) which comprises 13 individual trees, a group of trees and on the Southern boundary woodland which extends beyond the site. Land adjacent and to the east and south of the allocation is included within a Biological Heritage Site known as Big Wood which forms woodland and scrubland (Policy BNE9). |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|--|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| CHORLEY | | | | | | | | | | | | | | | | |
| EP1.14 | Fairport, Market Place Adlington | 0.6 | 10 | 3 | 4 | 10 | 4 | 10 | 4 | 4 | 6 | 0 | 55 | 27 | B1, B2, B8 | Site would need to be cleared by existing occupier Fairport. Access would be required from Market Place/B6227 Railway Road. Proposals would need to consider residents located at Railway View and Meadow Street located to the north east of the allocated site. |
| EP1.3 | Land to the North East of M61 junction (Gale Moss) Chorley | 6.9 | 10 | 6 | 10 | 5 | 4 | 0 | 0 | 8 | 8 | 3 | 54 | 42 | B2, B8 | The site is adjacent to the Green Belt. The site is within an area forming part of the source of the River Chor. Part of the site is within an ecological network – grassland identified by Lancashire County Council. The site is crossed north to south by Footpath No 26 Very little drainage infrastructure and no water infrastructure available in this area |
| EP1.6 | Cowling Farm, Chorley | 3.5 | 8 | 3 | 9 | 5 | 4 | 0 | 4 | 8 | 8 | 3 | 52 | 36 | B1(c), B2, B8 | The site is large, fairly regular in shape but undulating and would require some re-contouring. Housing adjacent Footpaths No 4 and No 5 cross the site and there is a related footbridge across the M61. |
| EP1.1 | Great Knowley, Chorley | 11.73 | 10 | 6 | 10 | 5 | 4 | 0 | 0 | 9 | 6 | 0 | 50 | 41 | B1, B2, B8 | Topography of the site, the Leeds and Liverpool Canal and the slope up to Knowley Brow. A Tree Preservation Order (No 8 (Chorley) 2006 and Definitive Footpath No 26 cross the site. The sites are identified as being within multiple National Character Areas Impacts to multiple ecological habitats Need to provide a bridge across the Canal is a barrier to financial viability Owner seeking housing Possible junction investment around J8, M61 required |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|---|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| CHORLEY | | | | | | | | | | | | | | | | |
| EP1.15 | Land east of Wigan Lane, Clayton-Le-Woods | 8.03 | 6 | 10 | 3 | 5 | 4 | 0 | 0 | 4 | 9 | 0 | 41 | 32 | B1(c), B2, B8 | Waterbodies cross site Ponds on site Trees on site Footpath 14 extends along the southern boundary of the site One active farm tenancy on the site Some £1.6 million in Growth Funding available to open this up. |
| EP1.17 | Rear of New Street, Mawdesley | 0.6 | 0 | 6 | 1 | 5 | 4 | 7 | 4 | 2 | 4 | 3 | 36 | 13 | B1(c), B2, B8 | Current access via narrow track between houses Possible contamination on some land Backland location |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|------------------------------|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|---|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| PRESTON | | | | | | | | | | | | | | | | |
| EP1.3 | Preston East Employment Area | 8.36 | 10 | 3 | 10 | 5 | 8 | 7 | 2 | 9 | 9 | 10 | 73 | 41 | B1(c), B2, B8 | Hedgerows and linear belts of trees act as valuable wildlife corridors. Trees and hedgerows on site Abandoned water mains run from the north east to south west of the South West Site Potential abnormal costs for gas and water infrastructure |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|--|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| PRESTON | | | | | | | | | | | | | | | | |
| EP1.4 | Red Scar Industrial Estate | 21.31 | 9 | 3 | 9 | 5 | 8 | 7 | 0 | 8 | 8 | 10 | 67 | 37 | B2, B8 | Woodland- small section to the northern boundary Woodland also adjacent (east) to the Area as part of the Red Scar and Tun Brook Woods SSSI Some Flood Risk An overhead power cable currently runs across the site towards the southern boundary. In addition, a foul sewer and culverted watercourse are known to run across the site |
| EP1.2 | Red Scar Site H | 2.75 | 10 | 3 | 10 | 5 | 4 | 0 | 0 | 9 | 8 | 10 | 59 | 40 | B2, B8 | Woodland- small section to the northern boundary Large drainage pond on site Some Flood Risk An overhead power cable currently runs across the site towards the southern boundary In addition, a foul sewer and culverted watercourse are known to run across the site |
| EP1.5 | Millennium City Park | 0.8 | 10 | 3 | 10 | 5 | 4 | 0 | 4 | 8 | 6 | 6 | 56 | 37 | B1(c), B2, B8 | Remaining land is backland Trees onsite Small site comprising mound covered with trees |
| EP1.10 | Preston East Junction 31A M6 | 7.08 | 10 | 3 | 10 | 0 | 1 | 0 | 2 | 7 | 7 | 10 | 50 | 37 | B2, B8 | Existing ponds on site. Trees and hedgerows on site An overhead electric cable runs diagonally across the site. Lies entirely within a low level flood risk zone |
| EP1.9 | Riversway | 0.35 | 0 | 10 | 3 | 0 | 4 | 10 | 8 | 5 | 8 | 0 | 48 | 26 | B1, B2, B8 | Trees on site |
| EP1.8 | Deepdale Street / Fletcher Road | 0.49 | 8 | 10 | 6 | 5 | 4 | 0 | 8 | 4 | 2 | 0 | 47 | 30 | B1, B2, B8 | Irregular shape |
| EP1.7 | Land North of Eastway (formerly Broughton Business Park) | 2.1 | 7 | 6 | 3 | 0 | 8 | 0 | 6 | 4 | 9 | 0 | 43 | 29 | B1, B2, B8 | Ancient Monument to the southern edge of the site – Cromwell's Mound Civil War Fieldwork Trees on site |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|----------------|----------------------|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|---|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| PRESTON | | | | | | | | | | | | | | | | |
| EP1.11 | Roman Road Farm | 24.94 | 0 | 3 | 4 | 5 | 1 | 0 | 0 | 8 | 8 | 6 | 35 | 23 | B2, B8 | Course of an old roman road runs through the northern section of the site The access route into the development site itself is currently unclear, potentially via existing Roman Way industrial estate Potential habitat for bats and birds within the site Trees and hedgerows on site Lies within close proximity to Tun Brook Woods SSSI |
| EP1.1 | Whittingham Hospital | 2.5 | 0 | 0 | 2 | 0 | 4 | 0 | 2 | 8 | 10 | 0 | 26 | 20 | B1(a), B2, B8 | Bat roosts on site Trees and hedgerows on site Buildings/foundations to be cleared Access to be upgraded |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|---------------------|--|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|--|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| SOUTH RIBBLE | | | | | | | | | | | | | | | | |
| B3 | South Rings, Cuerden | 11.05 | 10 | 10 | 10 | 10 | 10 | 7 | 4 | 10 | 10 | 3 | 84 | 50 | B1(c), B2, B8 | Pylons cross south west of the site Trees on site Public footpath crosses the site |
| E1(f) | Land Adjacent to Leyland Business Park, Farington | 2.1 | 8 | 10 | 7 | 10 | 4 | 0 | 10 | 10 | 10 | 0 | 69 | 45 | B1(c), B2, B8 | None |
| E1(d) | North of Lancashire Business Park, Farington | 9.2 | 9 | 10 | 8 | 10 | 4 | 0 | 4 | 10 | 10 | 0 | 65 | 47 | B2, B8 but with the possibility of B1(a) frontages | Trees on site River Lostock crosses the west of the site, possible flood risk in places Small pond on site. |
| C1 | Pickering's Farm, Bee Lane, Penwortham | 0.45 | 5 | 10 | 6 | 10 | 4 | 0 | 4 | 7 | 10 | 0 | 56 | 38 | B1(a) | Trees and hedgerows on site Existing farms on site Housing adjacent |
| E1(g) | Farington Hall Estate, West of Lancashire Business Park, Farington | 22.2 | 8 | 10 | 4 | 10 | 4 | 0 | 0 | 9 | 9 | 0 | 54 | 40 | B1, B2, B8 | Full access arrangements to be agreed Trees on site Footpaths cross the site Area of archaeological interest on the site (around Lower Farington Hall) Previously a landfill site for inert waste, likely contamination River Lostock adjacent, possible flood risk in places Waste processing facilities to the east. |
| E1(e) | West Paddock, Leyland | 1.28 | 5 | 6 | 4 | 5 | 4 | 0 | 0 | 6 | 4 | 0 | 34 | 25 | B1(a), B1(c) | Trees on site Culvert crosses the site Public footpath cross the edge of the site Other woodland (Shrugg's Wood) and recreation uses adjacent In a largely residential area |

| Site Ref. | Site Name | Revised Size (ha) | Site Location and Access | | | | Planning Status | Site Conditions | | | | Site availability | Total | Market-led Sub-total | Likely Use | Constraints |
|---------------------|--|-------------------|------------------------------------|------------------------|------------|------------------|-----------------|-----------------------|-------------|-----------------------|-------------|-------------------|-------|----------------------|---------------|--|
| | | | Road Proximity - Strategic Highway | Road Proximity - Local | Prominence | Public Transport | | Services Availability | Constraints | Environmental Setting | Flexibility | | | | | |
| SOUTH RIBBLE | | | | | | | | | | | | | | | | |
| C2 | Moss Side Test Trak, Leyland (Doll Lane) | 6.08 | 0 | 6 | 4 | 0 | 4 | 0 | 0 | 8 | 10 | 0 | 32 | 28 | B1(c), B2, B8 | Abnormal costs associated with transport and access Strong local opposition Various structures/facilities to be demolished Woodlands and hedgerows on site Ponds on site Housing adjacent Small scale land contamination in some areas |

Appendix 10 – Employment Area Analysis

Table A10.1 – Chorley Employment Areas

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---------------------------------|------------|----------|---|---|---|---|
| CHORLEY | | | | | | |
| Chorley North Industrial Estate | Chorley | 15.7 | Good quality, local industrial estate comprising multi-let terrace units and large distribution facilities B1(c), B2, B8 | The site comprises a mix of good quality large industrial units and average to good quality terraced units, accessible off the A674. Ennis Flint occupy the largest space on site with a large warehouse facility and external vehicle storage. The site is bounded by residential developments or housing development sites to the North, South and West and the M61 to the East. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Common Bank Area | | 16.2 | Industrial area characterised by small/medium terraced units and larger warehouse units. B1(a, c), B2, B8 | The area's main occupier is H&A Prestige Bottling who occupy the larger warehouse unit on site. Generally, units are of an average to good quality, in line with comparable local-level industrial areas and the area demonstrates a good level of occupancy. Surrounding land has environmental protection, including River Yarrow Biological Heritage Site as well as the active United Utilities Water Treatment Plant. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average Total Grade: A/B | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Ackhurst Business Park | Chorley | 0.59 | Ackhurst Business Park is a good quality local office estate with a number of two-storey | Ackhurst Business Park displays a good level of occupancy with occupiers including Handelsbanken and Foster Care Associates. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|---|--|---|---|
| CHORLEY | | | | | | |
| | | | premises. Some space now sub-divided to provide managed workspace B1(a) | | Total Grade: A | ancillary) uses |
| Chorley West Business Park | Chorley | 4.2 | Nine individual office premises located between Ackhurst Business Park and Common Bank B1(a) | Nine individual office premises, split between five buildings. At present, all units appear to be in occupation, with tenants including Reeds Rains and LSES Partnerships. Buildings are of an average quality, each with their own entrance and over two-storeys. The area is surrounded by woodland and areas of environmental protection. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| George Street, Clarence Street Estate, including Brunswock Mill | Chorley | 0.75 | Low quality industrial area, centrally located and bounded by residential stock B2, B8 | Good level of long-term occupancy with tenants including Alan Gordon Engineering and Ace Décor. Limited supply of units, generally of relatively low quality, supplemented with some trade counter-type uses of similar quality. The area is bounded by residential supply and due to its central location, provides no opportunities for future development. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Poor Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Friday Street / East Chorley Business Park | Chorley | 5.94 | Industrial area of diverse stock quality, comprising good quality, | Chorley East Business Park comprises good quality, two-storey industrial units entirely occupied by trade counter uses. Further down Friday Street, quality of stock diminishes somewhat with a small supply of terraced offices and multi-let industrial schemes. | Critical mass: Good Accessibility: Good Prominence: Average Environment: Average | Protect in the Local Plan as key local/county and regional employment area |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|------------|----------|---|---|---|---|
| CHORLEY | | | | | | |
| | | | modern units at Chorley East and older supply towards Southern end of Friday Street B1(c), B2, B8 | Given the area location with a dense residential area, there is little opportunity presented for infill development. | Total Grade: C/D | for B1/B2/B8 (and appropriate ancillary) uses |
| Highfield Industrial Estate | Chorley | 1.50 | Small group of mostly B8 trade units, plus Ambulance Depot, to rear of B&Q Store and other A49 services B8 | Area appears fully occupied, providing small and mid-sized units, of average quality, to mostly trade occupiers. Area tightly bound by other uses. | Critical mass: Average Accessibility: Good Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Moorlandgate Industrial Estate Road, Cowling | Chorley | 6.23 | Primary industrial area occupied in the majority by Moorlandgate Business Park to the North B1(a), B2, B8 | The South side of the site is occupied for the most part by Kerax, petroleum manufacturers. Premises are split between traditional industrial units, a small element of average quality office accommodation and a heavy industrial facility. To the North, the majority of the area is occupied by Moorlandgate Business Park, a private, gated facility with an apparently good level of occupancy. This offers both office and industrial premises of a relatively average condition. Further employment land already allocated to the east (Site EP1.6: Cowling Farm, Chorley). | Critical mass: Good Accessibility: Good Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Yarrow Business | Chorley | 1.55 | Low quality, former mill | Former mill premises, now operating as a multi-let industrial scheme of relatively low quality. Individual | Critical mass: Poor Accessibility: Average | Protect in the Local Plan as local |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---------------------------------------|------------|----------|---|--|--|--|
| CHORLEY | | | | | | |
| Centre | | | premises offering multi-let industrial accommodation B1(c), B2, B8 | premises offered with loading door capacity. Area sits within a dense residential area and bounded by train lines to the South West. Yard areas on site are limited almost exclusively to the border of the main building. | Prominence: Average Environment: Poor Total Grade: D | employment area for B1/B2/B8 (and appropriate ancillary) uses. But mill may offer long terms prospects for re-use and refurbishment for a range of uses. |
| Cowling Mill, Cowling Road, Chorley | Chorley | 2.40 | Low quality former mill premises B1(c), B2, B8 | Mill premises in poor condition. Chorley Van Rental occupy a certain amount of the northern end of the area. Surrounded by heavily wooded areas to the South and West. No further development land available, although the Mill as a whole represents an refurbishment opportunity. | Critical mass: Poor Accessibility: Poor Prominence: Average Environment: Poor Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. But mill may offer long terms prospects for re-use and refurbishment for a range of uses. |
| Cowling Business Park, Tincklers Lane | Chorley | 3.05 | Good quality, light-industrial accommodation in terraced configuration B1(c) | Relatively new build industrial accommodation with part brick-part clad exterior. Accommodation are of a very good quality. Supply shows a good level of occupancy with no suggested vacancies. Area is bounded by heavily wooded areas to the east, south and west, potentially presenting future opportunities. The area in its existing condition is at full capacity. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Martindales Depot, Cowling Road | Chorley | 2.2 | Industrial area of mixed quality, incorporation more modern industrial premises, as | Crosse Hall Street dissects the area in half with accommodation to the east of poor quality and accommodation to the west of relatively better quality, including some good quality light industrial units demonstrating a good level of occupancy. The eastern side, incorporating the Martindales Depot, is of much lower quality, with smaller units supplemented by large yard | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|--|--|---|---|
| CHORLEY | | | | | | |
| Crosse Hall Street | | 1.15 | well as some elements of dereliction B1(c), B2 | areas. The site appears to be at full capacity, although should Martindales relocate their depot would represent a brownfield redevelopment opportunity. | Total Grade: D | |
| Chorley Central Business Park, Stump Lane | Chorley | 1.02 | North side of Friday Street. Good quality, modern industrial accommodation B1(c) | Chorley Central Business Park comprises modern, two-storey industrial units with an element of office accommodation. General occupancy appears to be good, with some supply of vacancy. Tenants include Ultimaker International. To the East of this development sits a lower quality scheme. Given the area location with a dense residential area, there are little opportunities presented for development. Land to the north is protected open space. | Critical mass: Good Accessibility: Good Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Telent Site, Carr Lane | Chorley | 3.62 | Hybrid office and industrial facility occupied entirely by Telent. B1(a), B2, B8 | Externally the facility is of relatively poor quality however is occupied in its entirety by Telent. The facility encompasses an element of office and industrial accommodation, including a yard area to the south side of the facility. Housing or housing development sites to the north and west. Dense woodland and environmentally protected land/Green Belt to the east and south, associated with the River Yarrow. | Critical mass: Poor Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Standish Street | Chorley | 1.94 | Area characterised by generally low quality office accommodation B1(a), B1(c), B2, B8 | Centrally located area with a high level of occupancy. Majority occupier is Haslam Printers who occupy a low quality, five-storey mill type facility. Otherwise accommodation is of an average quality in a terraced configuration. Given the area location with a dense central and residential area, there are little opportunities presented for development. | Critical mass: Average Accessibility: Average Prominence: Good Environment: Average Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------------|----------|--|---|--|---|
| CHORLEY | | | | | | |
| Lower Healey Business Park, Froom Street, Chorley | Chorley | 3.10 | Large industrial site marketed by Workspace Properties as multi-let industrial facility B1(c), B2, B8 | External quality of facilities generally average, however space available to varying degrees of industrial activity. Poor accessibility through generally rural channels. Area sits to the east of the M61 and bounded by, and within, Safeguarded Land. Land to the east is designated as 'Area of Other Open Countryside'. In its current form, the site is at full capacity. | Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Coppull Enterprise Centre, Mill Lane, Coppull | Coppull | 1.50 | Former mill building currently being marketed as serviced office, industrial and workshop premises B1(a, c), B2 | Former mill premises. External condition of the building is relatively good, given conditions. Currently marketing options include office, light industrial and workshop space, with Bizspace as manager/owner. The area also includes a large yard area, including car park. However, there are some elements of vacancy. The area is tightly bounded by other uses, including a housing development site to the west and north west. | Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Chorley Business and Technology Park, Euxton | Euxton | 4.91 | Mixed use scheme comprising office and industrial accommodation B1(a, c) | Relatively good quality office and terraced light industrial accommodation, with some multi-let and some HQ office buildings. One major occupier is Alfa Travel. Occupancy rates appear high and there is no decrepit space on site. The current site is fully developed, and bound by housing and roads. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: B | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Momentum | Buckshaw Village | 1.02 | Modern, high grade small-mid sized industrial and warehouse space, close to rail station | High grade, well occupied space, linked to adjacent Southern Commercial, with adjacent services and rail station. Further expansion land already identified as employment sites. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|----------------------------------|------------------|----------|---|--|--|---|
| CHORLEY | | | | | | |
| | | | B1(c), B2, B8 | | Total Grade: A | ancillary) uses |
| Southern Commercial Area | Buckshaw Village | 4.65 | Modern, high grade small-mid sized industrial and warehouse space, close to rail station B1(c), B2, B8 | High grade, well occupied space, in two main sections, with adjacent services and rail station. Further expansion land already identified as employment sites. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Revolution | Buckshaw Village | 45.6 | New, modern, large scale warehouse / logistics developments directly located off the A6 B2, B8 | Prestige logistics facilities of extremely good quality, all with an element of office accommodation. Further growth land already identified as employment site. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Fairport, Market Street | Adlington | 3.47 | Large factor complex, mostly occupied by Fairpoint Engineering and NFS B2, B8 | Fairport Engineering occupy a large warehouse facility on Market Street, incorporating a large yard area and car parking. The external quality of the unit is average, with an element of office space to the front. All space is in use and location is tightly bound by surrounding uses. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Adlington South Business Village | Adlington | 4.13 | Small, modern industrial estate, centrally located in Adlington | Adlington South incorporates more modern, terraced light industrial spaces of a good quality with a limited element of vacancy. The area is heavily bounded by residential developments | Critical mass: Average Accessibility: Good Prominence: Average Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--------------------------------------|------------|----------|--|---|---|---|
| CHORLEY | | | | | | |
| | | | B1(c), B2, B8 | and train lines to the north. | Total Grade: C | ancillary) uses |
| Pincroft, Market Street, Adlington | Adlington | 4.15 | Historic factory complex, fronting the A6 and split between two occupiers - Pincroft and Carrington B2, B8 | Historic mill facilities, generally maintained in good condition by the occupiers and appear to be in full use. Site tightly bound by other uses. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Twin Lake Industrial Estate, Croston | Rural West | 3.28 | Small industrial site with limited stock and considerable yard space B1(c), B2, B8 | Site contains three small terraces of units of average quality. There is a considerable amount of yard currently used for storage, but may present future opportunities in regard to redevelopment and/or expansion. Access is via a comparatively narrow rural road which serves other community and leisure uses. Site is located with little prominence, separated from the rest of Croston by train lines, and bound by countryside. | Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Grove Mill, Eccleston | Rural West | 1.67 | Former mill premises used primarily as an auction house and for trade/retail uses B8 | Poor quality former mill premises used primarily as an auction house. Elements of retail/trade uses exist within but although there appears to be a strong level of occupancy, associated buildings are of a generally poor condition. The area has a yard area/car park which may lend itself to future expansion. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Park Hall, Charnock Richard | Rural West | 0.96 | Three self-contained industrial units | Three relatively modern industrial units, self-contained and in good condition. Occupancy appears to be at a maximum. | Critical mass: Poor Accessibility: Average Prominence: Poor | Protect in the Local Plan as local employment area |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---------------------------------------|-----------------------|----------|--|---|---|---|
| CHORLEY | | | | | | |
| | | | within the bounds of The Park Hall Hotel B2, B8 | The latest Outline Planning Application for the former Camelot Theme Park site (validated July 2017, App. No. 17/00710/OUTMAJ), undecided at this time, would provide 1,000 sqm of office and 2,000sqm workshop/starter units, together 195 dwellings. Initial masterplanning suggests this would be in the form of some ten starter/workshop units of up to two-storeys. The office would be developed for the use of Story Homes Lancashire. Location currently a Previously Developed Site in the Green Belt. | Environment: Good Total Grade: D | for B1/B2/B8 (and appropriate ancillary) uses |
| Towngate Works, Mawdesley | Rural West | 2.13 | Industrial area comprising a mixture of poor and average quality light industrial units B1(c) | Quality on site varies between poor and average, with a mixture of self-contained and terraced units. The scheme appears relatively well occupied. Whole estate falls within Green Belt which limits growth potential. However, 0.5 ha north-west corner of the site appears to comprise yard space and other possibly brownfield land, which may present future development opportunities. | Critical mass: Average Accessibility: Poor Prominence: Average Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Grimeford Industrial Estate, Anderton | Rural East/North East | 0.82 | Backland industrial estate in isolation and generally of poor quality B1(c), B2 | Former Grimeford Mill facility, now a multi-let industrial estate of generally poor quality. An element of accommodation sits as self-contained with space available within the terrace of the main building. Occupancy levels seem relatively high. Current site is at full capacity, and in Green Belt, with no evident brownfield expansion opportunities. | Critical mass: Poor Accessibility: Average Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Abbey Village Mill, Abbey Village | Rural East/North East | 1.08 | Former mill premises offering both office and light- | Former Abbey Village Mill premises, a 5-storey building converted into office and light-industrial premises. There is mix of occupied and vacant accommodation within. | Critical mass: Poor Accessibility: Poor Prominence: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|--|--|--|---|
| CHORLEY | | | | | | |
| | | | industrial accommodation B1(a, c), B2 | There are limited opportunities for expansion on the current site., although the mill itself may ultimately represent a refurbishment or redevelopment option. Site is bounded by some land outside of Green Belt to the south and west, but this appears in active agricultural use at this time. | Environment: Average Total Grade: D | appropriate ancillary) uses |
| Swansey Mill, Mill Lane, Whittle-le-Woods | North | 1.67 | Former mill premises offering both office and light-industrial accommodation B1(a, c), B2 | A large, multi-occupied former mill premises, converted into primarily light-industrial accommodation with some element of office space. There is a mix of occupied and vacant accommodation within. Former mill premises is located within busy retail area and is bounded by residential development on all sides, offering no potential for expansion from the current bounds. Ultimately the mill itself may offer a refurbishment opportunity. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Low Mill Industrial Estate, Town Lane, Whittle-le-Woods | North | 1.80 | Small industrial area incorporating a number of poor quality units, mostly concentrated on heavy, motor-based industrial uses B1(c), B2 | Units are generally of a poor quality, with busy, full yard areas on site. Occupancy rates appear to be relatively high however with no strong elements of dereliction. The area is generally bound by residential accommodation, and the site is dissected by the River Lostock. Thus, presents no strong potential for future expansion or redevelopment. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Poor Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Clayton Green Business Park, Library | North | 0.83 | Small, multi-let office park comprising five, two-storey | Buildings are of good quality and generally well occupied. There appear to be no integral vacancies. Estate roads are well maintained, and estate is bordered by a mass of trees. | Critical mass: Average Accessibility: Good Prominence: Good | Protect in the Local Plan as local employment area for B1/B2/B8 (and |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|-----------------------|---------------|---|---|---|---|
| CHORLEY | | | | | | |
| Road | | | buildings B1(a) | Small elements of heavily wooded land exist within the current site. It is bounded by residential developments and local leisure facilities, including a library building. | Environment: Good Total Grade: C | appropriate ancillary) uses |
| Railway Road, Brinscall | Rural East/North East | 4.56 | Large industrial area comprising a number of poor and average quality industrial units B1(c), B2 | Rural industrial location comprising a number of light industrial and industrial units/workshops. Space is generally of relatively poor quality. However, some elements of the site are of higher grade, including a road-fronting car dealership. Major occupier is Walmsleys who occupy the former Withnell Mill. The site is bounded, to a certain extent, by a residential development, with a quarry site to the south. The site is at full capacity. | Critical mass: Average Accessibility: Average Prominence: Poor Environment: Average Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Gregson Lane Industrial Estate, Bourne Row, Hoghton | Rural East/North East | 3.01 | Former Brindle Mill facility now trading as a multi-occupancy industrial estate B1(c), B2 | Buildings appear to be in average external condition. The site is at full capacity and the area is split by train lines. Bounded to east and west by Green Belt land. | Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Total | | 162.38 | | | | |

Source: CBC/BE Group, 2017

Table A10.2 – Preston Employment Areas

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|--------------------|----------|--|---|---|---|
| PRESTON | | | | | | |
| ELR No 1: Millennium Business Park | City North East | 11.583 | Modern mixed use business park providing high quality, self-contained office and industrial units to a range of established companies and with direct motorway access. B1(a, c), B2 | The quality of accommodation is very high, comprising modern offices and industrial units. All offices and industrial units are fully occupied. There are currently two sites allowing future redevelopment/expansion. The South West site (2.77 ha) is a hard-standing backlands site mostly occupied with commercial vehicle storage. The North Site (0.8) is vacant. This is an Employment Site. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 2: Rough Hey Industrial Estate / Booths | City North East | 22.75 | Industrial scheme comprised of average/poor quality industrial units. Particular occupier focus of car breakers and scrap metal. Booths site provides higher quality distribution space B1(c), B2, B8 | Quality of current stock is relatively low, however the level of occupancy is currently quite high. The site boasts a mixture of light and heavy industrial use. A large portion of the site is occupied by Car Take Back with a 4.5 ha site, incorporating car storage area and industrial unit. Site looks to be currently at capacity. Site bounded by other uses and residential scheme to the North East. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 5: Skeffington Road / | City North East | 1.677 | Low quality, backland employment | Developed portion of site currently holds a number of poor quality car uses, including car breakers and second-hand | Critical mass: Poor Accessibility: Poor | Protect in the Local Plan as local employment area |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|-----------------|----------|---|---|---|--|
| PRESTON | | | | | | |
| Castleton Road | | | location in a mostly residential area B1(c), B2 | care sales, however all space is occupied. Developable area of site is of irregular shape and otherwise bounded by high density residential space. South West tip of site is currently being used for storage of commercial vehicles. This is an Urban Employment Site. | Prominence: Poor Environment: Average Total Grade: D | for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 6: The Brick House | City South East | 0.979 | Low quality, backland employment location in a mostly residential area B1(c), B2 | Site accessed via Ducie Place off New Hall Lane (Poor) and site is comprised of a small number of low quality units. Majority of site is used as industrial storage to service tenants, including Ribble Radiators. Site has the capacity for development on the current storage land. Bounded to the North by employment uses and to the East by residential uses. Greenbelt land (Policy EN12) to the South of the current site restricts expansion. | Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| ELR No 7: Preston East Employment Area | City North East | 13.13 | Comprised of two large sites – North East developed and the South West site partially developed. Part of the wider employment area including Red Scar and Roman Way. B1(a,c), B2, B8 | North Site has been developed to include a Spar distribution centre and petrol station with associated uses. South West site has partially been developed for Girl Guides UK and car dealerships. Remainder of South West site is being marketed by GVA for Design & Build opportunities of 929-18,580 sqm and identified as Employment Land. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses, |
| ELR No 14: 25-109 Garstang Road | Preston Central | 5.184 | Mixed use employment site – majority office B1(a) – within a | Average quality terraced office conversions with a small amount of industrial stock to the South of the employment area. Prominent occupiers include Dulux and Barclays Bank. Further North occupiers are housed in converted | Critical mass: Average Accessibility: Average Prominence: Good | Protect in the Local Plan as local employment area for B1/B2/B8 (and |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|-----------------|----------|--|--|---|---|
| PRESTON | | | | | | |
| | | | high density residential area B1(a, c) | detached properties, which include St Johns Ambulance. General limited vacancy with presumably a number of long standing tenants. Site is at capacity, bounded by residential stock. No clear opportunities for redevelopment/expansion due to high density of current site. | Environment: Average Total Grade: C | appropriate ancillary) uses |
| ELR No 17: Red Scar, Whittingham Lane, Broughton | City North East | 61.00 | Prominent industrial business park within the wider Preston East/Roman Way employment areas. B1(c), B2, B8 | Current developed space is comprised of six individual schemes, currently with limited availability. Industrial stock is of mixed quality with a number of modern units alongside old, brick-built units of extremely poor quality and in great disrepair. Development land available to the East/South, currently being marketed by JLL as design and build options up to 743 sqm currently. This space is being marketed as either warehouses, office and/or land. This is an employment site. Greenbelt land (EN12) to the South. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 18: Roman Way Industrial Estate | City North East | 24.675 | West established industrial estate offering mixed-use accommodation including Astra Business Centre and well established occupiers including BAKO. B1(a, c), B2 | Average quality industrial stock, the estate comprised of a number of smaller schemes. Elements of the estate are of high density. A large element of the site is attributed to Astra Business Centre, which is currently of a diminished quality. Site EP1.11 Roman Road sits to the East of the industrial estate, potentially offering 24.94 ha of developable land. There are also a number of small undeveloped parcels of land within the bounds of the estate, measuring approximately 2.5 ha. Otherwise Open Countryside (EN1) to the South and North-East. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 19: Mondiboard, | City North East | 10.814 | Distribution warehouse for | Good quality distribution facility for Mondiboard/Board 24 Ltd. Access provided off Longridge Road with unit set back | Critical mass: N/A Accessibility: Good | Protect in the Local Plan as local |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|------------------------------|-----------------|----------|--|---|--|---|
| PRESTON | | | | | | |
| Longridge Road | | | Mondiboard, located between the North-East edge of Red Scar and West edge of Roman Way B8 | behind tree line. Gated entrance. HGV parking to the rear. Developable land borders the site to the North, with Open Countryside (EN1) to the South. Both sites are somewhat compromised by presence of water and dense tree lines. | Prominence: Good Environment: Good Total Grade: B | employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| ELR No 20: Preston Riversway | West | 38.02 | Mixed area comprising heavy industrial, light industrial and office uses. Part of site has also been developed out as residential by Mulberry Homes. B1(a, c), B2 | Site operates off the spine Chain Caul Road. North of Chain Caul Road is the heavy Total UK bitumen operation. South sees a combination of business park office space and light industrial space. Of this space, quality of stock is relatively good with evidence of a high occupancy rate. Some industrial stock is of specifically average quality. Limited developable space within the current site boundary – only remaining plot of 0.35 ha remains. Land is vacant to the immediate west of the employment area. This is noted as ELR 25: Riversway Phase B. Part of this land has been developed into three individual car dealerships. | Critical mass: Good Accessibility: Good Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 21: Christian Road | Preston Central | 1.475 | Distribution/delivery office for Royal Mail (Preston Central). B8 | Site is used solely by the Royal Mail as the Preston Central delivery office. Main distribution centre is of good quality and benefits from self-contained parking for both staff and delivery vehicles. Site sits directly to the East of the Fishergate Hill Conservation area (EN8). Otherwise, the site is bounded completely by residential development and adjacent train lines, so is at fully capacity, barring a development on what is currently yard/parking area. | Critical mass: N/A Accessibility: Poor Prominence: Poor Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 22: Hartington Road/ | Preston Central | 1.82 | Site boasting two occupiers – Electricity North | Site is bounded for the most part by residential stock. The southern side of the site border Fishergate Hill and the A5072. Electricity North West's Preston depot is of | Critical mass: Average Accessibility: Good Prominence: Good | Protect in the Local Plan as local employment area |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--------------------------------------|-----------------|----------|--|---|---|--|
| PRESTON | | | | | | |
| Fishergate Hill | | | West and Nissan car dealership B1(a), Sui Generis | externally poor/average quality. However, the Nissan car dealership is considerably more modern space. A notable amount of space at this site is attributed to parking for Electricity North West. There is 0.2 ha of land to the South of the site, north of Fishergate at the junction with the A5072. This is however identified as Green Infrastructure land (EN2). | Environment: Average Total Grade: C | for B1/B2/B8 (and appropriate ancillary) uses. Possibly separate out car dealership. |
| ELR No 24: Paley Road | Preston Central | 1.463 | Small employment area split into two distinct areas, surrounded by a high density of residential stock B1(c), Sui Generis | Site is comprised of Arnold Clark car dealership and multi-let Ribble Saw Mill. Ribble Saw Mill provides average-good quality light industrial space, suffering from poor prominence and accessibility, which is provided through the residential estate. This is an Urban Employment Site. There is an element of Existing Woodland (EN8) to the East. The site is bounded by residential stock and therefore presents no opportunities for future development/expansion. | Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. Possibly separate out car dealership. |
| ELR No 25: Preston Riversway Phase B | West | 20.025 | Extension to the immediate west of current Riversway development Sui Generis | Current development in the North-East corner of site comprises motor park with car dealerships for Renault, Audi and Mercedes Benz. Site runs adjacent to the A583 to provide strong prominence, as well as access from the west bound carriageway. Site is a Mixed Use (EP5) Employment Allocation (EP1), with an element of Park & Ride (IN4) in the North West corner. There is a mass of developable land yet to be progressed. | Critical mass: Poor Accessibility: Good Prominence: Good Environment: Good Total Grade: C | Consider as future growth option but recognising that past development has been for motor trade park. |
| ELR No 27: Bow Lane | Preston Central | 5.58 | Relatively large central Preston area comprising Council buildings, associated car | Primarily office area encompassing Lancashire County Council and Lancashire Registration Service, along with associated parking. Space is supplemented by small pockets of residential space. Industrial space is of poor quality. Across the employment area there appears to be a | Critical mass: Average Accessibility: Average Prominence: Good Environment: Good | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| | | | parking and light industrial stock B1(a, c) | high occupancy rate. Site is bounded by residential area and train lines, so does not present future development opportunities, unless there is major vacating of the LCC buildings. Part of the site falls under the County Hall Conservation Area (EN8). | Total Grade: B | ancillary) uses |
| ELR No 28: Riversway A – Portway / West Strand | West | 29.393 | Mixed-use development area surrounding the dock – comprised of office, retail and industrial distribution space B1(a, c), A1, B2, B8 | Mixed-use site comprising a mix of quality. Area is made up of a number of schemes, prominently including the major office building Tustin Court (some vacant options available through Robert Pinkus & Co) and the Pavilions (mainly fully occupied, offering a combination of conventional and serviced space through Regus). Other uses include car dealerships, fast food outlets and restaurants combined with a number of leisure uses. Industrial supply is supplemented with low-quality light industrial units to the North Side, adjacent to the A583. Site is bounded and fully developed out – does not present any future opportunities for immediate development. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: B | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Consider separating out the non B-Class uses in future spatial mapping |
| ELR No 29: Sharoe Green Hospital | City North East | 10.358 | Operating as Preston Business Centre, with a major occupier the NHS for a Specialist Mobility Rehabilitation Centre B1(a) | Long-standing building occupied the most part by the NHS, Sharoe Green Hospital (or Preston Business Centre) is of relatively good quality, presented in well-kept grounds, with parking to the rear. South side of the site is bounded by residential stock, however 3.3 ha on the north side could potentially provide further development. On the northern border of this land is a portion of Green Infrastructure (EN2). Current usable site space however is comprised entirely of the former hospital building. Some grassed area is provided to the front of the building which could provide future development space. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as key local employment area for B1(a) and D1 medical. |
| ELR No 30: North | City North East | 53.448 | Good quality industrial and | Generally, very high quality office and industrial accommodation. Large distribution units occupied by | Critical mass: Good Accessibility: Good | Protect in the Local Plan as key |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| Preston Employment Area | | | office site, offering a mix of modern offices, light industrial, and distribution premises B1(a, c), B2, B8 | Transcontinental Group and Royal Mail, CPC Farnell and JTF. This is supplemented by a number of individual office schemes of high quality, offering space over both one and two floors. Area is bounded to the South and West by residential developments, supplemented by parcels of Green Infrastructure (EN2). There is 1.5 ha of partially hardstanding vacant land at the northern-most entrance to the site, at the corner of Oliver's Way and B6241, surrounding current Transcontinental unit. | Prominence: Good Environment: Good Total Grade: A | local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 33: Moor Lane / Victoria Street ELR No 36: Eastham Industrial Estate / Aqueduct Street | Preston Central | 0.279 | Majority industrial area, bounded by residential stock. Supply in area supplemented by student housing and university and school buildings B1(a, c), B2, B8. | Largest site in the area is occupied by Wickes as a large trade counter use. This is a good quality unit. Elsewhere, area is focused around poor to average quality light industrial units. Limited vacancy. Another major occupier is Meat@TheFactory, offering wholesale meat goods. They occupy a more modern industrial unit, as well as a converted brick built factory of a poorer quality. There is limited office stock, all of which is restricted to poor quality, converted terraced space in the North-West corner. The majority of buildings on the eastern edge of the site are attributed to UCLAN, including the Vernon Building. Large element of area is attributed to student accommodation and primary school are (English Martyrs' Catholic Primary School). Area is currently at full capacity, offering no opportunities for redevelopment. Land in centre of site is attributed to school playing fields. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses, but look to separate out non B-Class uses were relevant |
| ELR No 34: North Road B / Kent Street | Preston Central | 13.617 0.851 | Low to Average quality industrial accommodation in well- | Generally low quality light industrial space, with particular focus on car breakers and utilities. Vacancy levels appear low. Modern industrial options are limited and are restricted on the whole to the western edge with an Iceland | Critical mass: Average Accessibility: Good Prominence: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| ELR No 35: Rye Street / Canute Street | | | established estate, to the North of the town centre B1(a, c), B2, B8 | distribution unit in the South-West. Other occupiers in modern units in the North-West are Pure Gym, American Golf, Kwik Fit. Office supply limited to poor quality Sanderson House. Partially occupied. There is a certain amount of derelict space, which could be cleared or redeveloped. Otherwise, area sits within a heavily built-out residential area. Housing site (HS1, MD1, MD2) to the immediate East. | Environment: Poor Total Grade: C | appropriate ancillary) uses |
| ELR No 39: Land at New Hall Lane / St. Mary's Street ELR No 45: Crook Street / Campbell Street ELR No 46: Ribbleton Lane / New Hall Lane | Preston Central | 1.543 | High density city centre employment area with limited office supply and a number of industrial options ranging from poor to average quality B1(a, c), B2, B8 and A1 | Average quality, HQ office building (St. Mark's House). Poor quality, terraced retail space. Majority of accommodation is poor to average quality industrial space, centred on a number of schemes, including – a small terrace of industrial units with some vacancies via Preston City Council, converted mill building majority occupied as Preston Antiques Centre, and a large, multi-occupied unit on Campbell Street marketing individual units from 615 to 3,524 sqm. Other schemes to the North other average quality industrial units, with limited vacancy. Whilst units are generally not of good quality, one of the largest occupiers is B&M bargains, operating out of a considerably better quality unit. Some units are of extremely poor/derelict quality and there is a single vacant site within the employment area. Otherwise this high density site it seemingly at full capacity. Central Housing Site between ELR45/46, restricting development. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Poor Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 40: Ribbleton Street / Deepdale Road | Preston Central | 1.293 | Poor Quality area comprised of average quality, multi-occupancy office building | The Watermark, 9-15 Ribbleton Street offers serviced, incubator space with a number of vacancies. Externally the building presents itself as of average quality, however refurbished studio space is offered on a leasehold basis. Industrial units appear to display a low level of vacancy. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| | | | and low-quality industrial units being used for motor repair purposes B1(a, c) | Area is currently at capacity and presents no opportunities for future expansion/development, bar a small plot of land in the South West corner, currently being used as a small car park. Office accommodation is constrained by both HM Prison Preston to the South and terraced housing to the West. Green Infrastructure land (EN2) to the North West. | Total Grade: D | ancillary) uses |
| ELR No 41: Ribbleton Lane / Longworth Street | City South East | 3.205 | Comprised entirely of poor quality industrial accommodation B1(c), B2, Sui Generis | Area is generally characterised by poor quality industrial accommodation and car dealerships to the North. Approximately half of area is attributed to a large, converted factory, now a multi-occupancy facility. This is of poor quality and suffers from lack of heavy goods access due to location within residential area. Area is bounded by residential accommodation on all sides, however presents land of approximately 0.8 ha within the current boundary which may present a future development option. | Critical mass: Average Accessibility: Average Prominence: Poor Environment: Poor Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 42: Waverley Park Mill | City South East | 1.396 | Large single-storey warehouse with considerable yard area. Supplemented at entrance with a trade counter B8 | Entire area is occupied by Buildbase, with the large warehouse and yard used as a storage facility and a trade counter use at the site entrance. All buildings are of poor to average quality. No space is currently vacant. Site is bounded by residential stock and Green Infrastructure (EN2) land to the South, so presents no immediate development opportunities, other than expansion/redevelopment within the current yard area. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Poor Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 43: Deepdale Mill Street ELR 44: Deepdale | City South East | 0.286 9.152 | Industrial area comprised of poor to good quality industrial accommodation. | Combination of trade counter and manufacturing industrial facilities. Limited vacancy. Major occupiers include Screwfix, Granite Tops UK, Safestore and Euro Car Parts. Generally good quality stock, including modern unit at the western side of Fletcher Road used for Halal meat | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| Street / Fletcher Road | | | B1(c), B2, B8 | processing. Certain elements of poor quality stock, including the Beech's Fine Chocolates facility on Fletcher Road. South-East corner borders Housing Site HS1.6/7. | Total Grade: C | |
| ELR No 48: Frenchwood Knoll / Selborne Street | City South East | 1.70 | Mixed use area containing large office HQ office building and vehicle maintenance workshop B1(a), B2, B8 | Area is characterised by two individual uses, joined by new residential development. Poor quality industrial facilities used a maintenance facility by Stagecoach and average quality large office premises occupied by Virgin Media. These two facilities are connected by older terraced housing and new detached/semi-detached housing. A series of allotments border the Virgin Media facility to the South. Elsewhere, the area is bounded by residential stock so does not provide any immediate opportunities for development. HS1.9 borders the North. | Critical mass: Poor Accessibility: Good Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 49: Unicentre, Derby Street ELR No 61: Church Street / Pole Street | Preston Central | 0.258 0.179 | 12-storey, refurbished office centre just outside of Preston city centre, supplemented by residential block (ELR No 61) B1(a) | The Unicentre is a 12-storey, refurbished office building currently offering a total of 1,378 sqm office space. External quality is average and site sits within a densely developed area. Current quoting rents are relatively low for city office stock – c.£110/sqm. Site sits within the City Centre North Opportunity Area (OP3). Area is currently fully developed, solely containing the Unicentre. | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 50: Ormskirk Road | Preston Central | 0.713 | Three individual 8-10 storey office buildings offering primarily serviced space B1(a) | Three office buildings – Red Rose House, Duchy House and Elizabeth House – offering serviced space under the collective title of Preston Office Centre. Site sits within the City Centre North Opportunity Area (OP3). Site also falls within the proposed Extension to Primary Shopping Area (EV1). Current availability stands at 4,918 sqm across Red Rose House and Elizabeth House, | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| | | | | but site is fully developed so presents no immediate opportunities for future development. | | |
| ELR No 53: County Offices, East Cliff | Preston Central | 1.67 | Lancashire County Council operated buildings, comprised of both old, converted Park Hotel and a more modern, seven- storey office building. It is understood the bulk of this will be converted to C1 hotel and spa use B1(a) | Large County Council facility, with proposals for a hotel conversion over the bulk of the site. | Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: C | Amend to reflect emerging change of use plans here |
| ELR No 54: Winckley Square / Chapel Street ELR 65: Winckley Square (SW) / East Cliff | Preston Central | 0.993 1.641 | Good quality, terraced office accommodation occupied in the majority by professional services B1(a) | Area connects to Fishergate and the core City Centre to North. Landscaped gardens connect the four sides of Winckley Square. Elements of vacancy, both in terms of single floor lettings and the freehold sale of whole buildings. Quality of stock is generally good externally with each terrace subscribing to stock appearance lending themselves to a coherent employment area. Site within the Winckley Square Opportunity Area (OP2). Area is of high office density, however the former St. Joseph's Institution on Mount Street currently sits derelict and may provide opportunities for development in the future. Whilst this does not sit directly on Winckley Square, development here could complement the alternative access used by many occupiers off Mount Street. | Critical mass: Good Accessibility: Average Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| ELR No 55: Fox Street / Corporation Street / Surgeon's Court | Preston Central | 1.342 | Mixed-use area off Fishergate. Contains an element of office, retail and hotel accommodation, supplementing the City Centre's primary supply B1(a), A1, C1 | There is an element of average quality office accommodation on St Wilfrid Street. Three-storey office buildings within a terrace, marketed as suitable for alternate uses. Retail element in the North is small, but low in quality and fully occupied. Majority of area is occupied by Premier Inn Preston Central, including associated car parking in the North of the area. Site within the Corporation Street Opportunity Area (OP1). Given the high density of the site in its current locations, there does not appear to be any major opportunities for development. There is a small element of land currently straddling the South and West side of the Premier Inn (approx. 0.08 ha), currently being used a temporary parking. | Critical mass: Poor Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as mixed use area, with regeneration potential in the wider City Centre context |
| ELR No 56: Avenham Street | Preston Central | 1.75 | Mixed-use area incorporating low-quality retail space, serviced / conventional office space and restaurants B1(a), A1, A3, A4 | Area connects off the main Church Street shopping area. Despite a strong element of low quality accommodation, there are some key occupiers in relatively modern accommodation these include the multi-let spaces at Innovation@Buckingham House on Glover's Court and Birchall Blackburn Law on Avenham Street, both of which are of a relatively good quality. A small element of student housing is present at the southern-most end of Glover's Court, provided through TJT Students. There is a strong element of general vacancy in this area, given the strong amount of derelict former retail premises (see below). Sits within the Stoneygate Opportunity Area (OP4). Western edge of site part of Extension to Retail Area. Car park in South East of site now Housing Allocation SP4.2. Given its position in Preston City Centre, the area is fully developed, bar a small 0.02 ha plot off Avenham Street. Elsewhere this area suffers from a large proportion of very poor quality/derelict former retail premises which could provide | Critical mass: Average Accessibility: Average Prominence: Average Environment: Poor Total Grade: C/D | Protect in the Local Plan as mixed use area, with regeneration potential in the wider City Centre context |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| | | | | the basis for regeneration moving forward. | | |
| ELR No 62: Walker Street | Preston Central | 2.609 | Area split between BT campus, incorporating office and industrial premises, and Walker Street Car Park B1(a, c) | BT campus is comprised of two office facilities, one a 12-storey building of average external quality and one a 4-storey building of slightly better but still average external quality. Both sit on Moor Lane with good prominence on the northern side of the immediate City Centre. The campus is then supplemented by gated industrial premises of poor to average external quality with access provided via North Street. The remaining half of the area is occupied as Walker Street Car Park offering two levels of all-day parking. Site is fully developed and presents no immediate opportunities for expansion, being bounded by the City Centre. Given that the BT campus is of diminishing quality, some element of regeneration may be possible moving forward. | Critical mass: Good Accessibility: Average Prominence: Good Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 63: Oakham Court/ Laurel Street No 64: Shepherd Street | Preston Central | 1.039 0.832 | Majority industrial area of very low quality, incorporating both small industrial schemes and self-contained premises B1(c) | Low quality but high occupancy at small industrial scheme, Oakham Court. Remainder of premises occupied by majority tyres and valeting occupiers. Industrial space partially supplemented by limited element of single-storey office premises. These are of poor quality and almost derelict in places, including Oakham Court. North West corner contains poor quality takeaway premises. Premises off Shepherd Street are of extremely poor quality, sitting vacant and almost derelict. A large proportion of the surrounding area is being used as paid car parking. Area generally characterised by very poor quality premises with an element of dereliction. Site within the Stoneygate Opportunity Area (OP4). Site is fully developed and bounded by residential/commercial space. | Critical mass: Average Accessibility: Average Prominence: Poor Environment: Poor Total Grade: D/E | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| ELR No 66: Winckley Square (South and East) / Cross Street | Preston Central | 2.506 | Good quality, terraced office accommodation occupied in the majority by professional services. Options further East towards Cross Street provide office accommodation of differing quality B1(a) | General description subscribes to that of ELR No 54/65 focused on Winckley Square. This applies the South and East terraces of Winckley Square. Towards Cross Street office supply becomes diminished in quality with an element of vacancy. Largest accommodation can be found at Norwest Court (current vacancy of 764 sqm total). This building is of average external quality. Alternative office supply on Cross Street is supplemented by relatively low quality terraced space with elements of vacancy. The quality of this stock leads into ELR No 56: Avenham Street. There is adequate supply in this area, however current availability is much higher than the nearby Winckley Square, presumably due to general quality. The area is however fully developed and bounded by other commercial premises. Site within the Winckley Square Opportunity Area (OP2). North East corner of site falls into Extension of Primary Shopping Area (EV1). | Critical mass: Good Accessibility: Average Prominence: Good Environment: Average Total Grade: B | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 68: Kaymar Industrial Estate | City South East | 6.525 | Diverse industrial area with a combination of low quality former mill-type industrial premises and more modern manufacturing facilities to the North B1(a, c), B2, B8 | Majority of industrial estate is made up of the old, converted mill-style building now housing a multi-occupancy set up. On the eastern edge of this is more modern industrial accommodation currently occupied in part by Ghost Bikes and Pro Jump. On this southern side of the employment area is a small supplement of poor quality, almost derelict office accommodation currently not clearly being marketed. The northern edge of the area is occupied by Incorez/Sika Liquid Products who operate out of modern industrial and glass-fronted office premises in their own self-contained facility. Area is fully developed, with Green Belt land to the southern side of Brockholes View. | Critical mass: Good Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 69: North Road | Preston Central | 2.414 | Mixed area with elements of retail | The area is characterised by several large occupiers (including Self Storage, Easirent and Alan Howard) | Critical mass: Poor Accessibility: Good | Protect in the Local Plan as local |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| A | | | and office. Generally, of poor to average quality B1(a, c), A1 | operating out of average quality industrial units. Elsewhere the area contains a number of poor quality, terraced retail accommodation, mostly on the ground floor level of larger residential blocks. There is some element of dereliction, including the abandoned office premises on Melling Street. Urban Employment Site. Each premises is built upon a larger plot than generally expected allowing for ample parking for each occupier. As such, given the central location of the area, there does not appear to be any available development opportunities. | Prominence: Average Environment: Poor Total Grade: D | employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 70: Tulketh Brow / Fylde Road ELR No 71: Depot Shelley Road / Old Lancaster Lane ELR No 72: Shelley Road | West | 1.134 0.202 4.599 | Heavily industrial area to the North West of the City Centre. B1(a, c), B2, B8 | Major occupiers in the southern-most site include Travis Perkins and ATS Euromaster. Industrial premises in this location differ in external quality, however some vacancies on Aqueduct Industrial Estate are currently being marketed. The northern-most site on Shelley Road contains large industrial/office premises for Zabou as well the multi-occupied Brookhouse Mill. Quality of accommodation here is generally average, with some infill residential stock to connect both areas. Sites are generally bound by local residential accommodation, however there is a small element of land surrounding the immediate North West of the Travis Perkins site which could present future development opportunities. Sites intersected by Lancaster Canal – Wildlife Corridor and Biological Heritage site (EN10), which could impact upon development. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 73: Tulketh Mill | West | 3.941 | Converted mill premises offering refurbished office and retail accommodation | External quality of mill is good within context of converted premises of this nature. Current space is being marketed as refurbished office and/or retail units on all floors and ample parking is provided at the site entrance. Accessibility is generally good for nothing heavier than a car, meaning the site is tailored towards standard office and retail uses, rather | Critical mass: Average Accessibility: Good Prominence: Good Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| | | | B1(a), A1 | than anything more industrial. Area offers no immediate opportunities for development, solely containing Tulketh Mill. | Total Grade: C | |
| ELR No 77: Starkie Industrial Estate / Brierley Street | West | 2.221 | Small industrial scheme amongst residential area. Major occupier of Jewson supplemented by smaller industrial occupiers B1(c), B2 | The area is occupied mainly by a large Jewson facility, including ample yard, off Raglan Street. Smaller, slightly more modern industrial premises off Brierley Street suffering from poor access. General limited supply, but fully occupied. Bounded by residential to the West and train lines to the East. Does not offer any future development opportunities. | Critical mass: Poor Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 78: Land Adjacent to Ringway / Falkland Street | Preston Central | 2.108 | Small industrial area beside train lines. Fully occupied. B1(c), B2 | Small, infill area accessed off Corporation Street and running in between the train lines and Ringway. Majority of site used as a yard area to supplement the average quality units on site. Site sits within Corporation Street Opportunity Area (OP1). 0.5 ha of irregular yard space available at site entrance off Corporation Street could provide future development opportunities. As industrial site, area is isolated, connecting to mainly retail premises off Fishergate. | Critical mass: Poor Accessibility: Poor Prominence: Average Environment: Average Total Grade: D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 80: Croft Street / Wellfield Road | West | 6.635 | Busy industrial area comprised of small industrial schemes, self-contained premises and Wellfield Business Park | Industrial stock generally of good quality with trade occupiers National Tyres and other non-traditional industrial uses including The Store Room and Mini's Party and Play Centre. Other occupied stock is held by more traditional industrial uses, including those on the fully occupied Old Brewery Trading Estate. There is some level of dereliction and vacancy in the centre of the employment area, incorporating both office and | Critical mass: Good Accessibility: Good Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
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| PRESTON | | | | | | |
| | | | B1(a, c), B2 | industrial stock. This could provide opportunities for regeneration and development moving forward. This stock is located on the northern end of the site, with the better quality options more prominent on the A59. | | |
| ELR No 84: West Strand / Marsh Lane | Preston Central | 6.933 | Strong office park containing both Preston Technology Park and Preston Technology Management Centre B1(a) | Preston Technology Park offers good quality office space in modern premises. There are five buildings, all fully occupied. Occupiers include Enterprise Ventures and Atos. This flagship space is supported by Preston Technology Management Centre, offered as serviced space through Bizspace and an element of lower quality, two-storey terraced offices in the North-East corner. Another office building, currently undergoing refurbishment, is seemingly occupied by BAE Systems. The site is bounded on all sides by development and to the South by the A59. Low quality residential accommodation sits to the South-East corner of the Park. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |
| ELR No 85: Greenbank Street / Bond Street ELR No 86: Maudlands, Aqueduct Street | West | 12.544 1.976 | Industrial site, sitting on the opposite of the train lines to ELR No 77: Starkie Industrial Estate / Brierley Street. Connected to ELR No 77 via Maynard/Bold St to the North B1(c), B2 | Mix of industrial quality stock ranging from very low (some of which entirely vacant) to some modern units occupied by LDG Coatings/Contracts. Area is occupied in the majority by both Aqueduct Mill – marketing space from 37 to 790 sqm – and the large Tarmac Centre processing facility. Urban Employment Site. Site is fully developed with no present opportunities for expansion given that it is bounded by train lines and residential accommodation. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Poor Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Total | | 413.46 | | | | |

Source: PCC/BE Group, 2017

Table A10.3 – South Ribble Employment Areas

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|---------------|----------|--|--|---|--|
| SOUTH RIBBLE | | | | | | |
| Emp. Area 2: Sceptre Way | Bamber Bridge | 3.00 | Modern office park providing high quality self-contained and terraced office units to a range of established companies and with direct motorway access. Includes HQ offices for Eric Wright Group and James Fisher Nuclear. B1(a) | The quality of accommodation is very high, comprising modern offices. No office building is fully vacant at present although some upper floor premises are available in sub-divided properties. In principle local employment site E2: Kellet Lane, Bamber Bridge is available as an extension to Emp. Area 2: Sceptre Way. However, the most recent developments at the eastern end of Sceptre Way have largely cut off this site from the developed office park. Opening up the Kellet Lane site would therefore either require a renegotiation of ownership/access arrangements from Sceptre Way or provision of a separate access from the north (Kellet Lane), crossing other agricultural land. | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect strongly in the Local Plan as key local/county and regional employment area for B1(a) offices. |
| Emp. Area 3: Walton Summit Employment Area | Bamber Bridge | 95.80 | Very large and well established industrial estate, located within the merging point of the M6/M65/M61 Motorways. Generally, comprises larger B2/B8 units in the north and east and small-mid-sized industrial | In discussions, agents and developers did highlight some concerns about the quality of premises here. Larger (300 sqm plus) units here are less desirable, and take longer to let/sell than in other locations in the Borough, due to their limited parking, the general congestion of the industrial estate, along with issues of building condition. This is the only location in South Ribble where agents/owners have to significantly reduce rents to secure occupiers. Individual owners, such as Hansteen, are investing in premises to address concerns and make properties more marketable. However, it is not clear from external visual inspections how widespread issues of building quality are and to what degree estate congestion can be mitigated. The estate appears fully developed and further expansion is prevented by the adjacent motorways, railway line, | Critical mass: Good Accessibility: Good Prominence: Good Environment: Average Total Grade: B | Protect strongly in the Local Plan as key local/county employment area for B1/B2/B8 (and appropriate ancillary) uses. |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|---------------|----------|--|---|--|--|
| SOUTH RIBBLE | | | | | | |
| | | | units in the south and west. A hotel sits on the edge of the area (B1(a, b, c), B2, B8, C1) | housing and Green Belt/Green Wedge land. | | |
| Emp. Area 4: Club Street | Bamber Bridge | 13.70 | Backland industrial location comprising a large modern industrial plant for Baxi Heating (UK) in the south and east, and a smaller group of light industrial properties to the north and west. (B1(a, c), B2, B8) | The Baxi site comprises a large modern production facility. In discussions, Baxi has confirmed its desire to remain and grow in this location. Other premises in the area are of moderate quality but appear well used and occupied. Land to the north, which includes vacant industrial premises would be a logical growth location. However, this land (Land off Wesley Street, Bamber Bridge) is now identified for housing in the Site Allocations and Development Management Policies DPD | Critical mass: Good Accessibility: Average Prominence: Poor Environment: Average Total Grade: B/C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses and particularly as a site for key local employer. |
| Emp. Area 5: South of School Lane (previously A S Orr's Mill) | Bamber Bridge | 5.90 | Mid-sized, established local industrial estate within the Bamber Bridge settlement area (B1(c), B2, B8) | Although the quality of premises varies, most units are of a reasonable standard and are well occupied. The Area continues to have a useful role providing affordable industrial premises to local micro businesses, including an element of motor repair. None – all land and premises appear to be in use. Site tightly bound by other uses. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|---------------|----------|--|---|---|--|
| SOUTH RIBBLE | | | | | | |
| Emp. Area 6: Dunbia | Bamber Bridge | 9.30 | Modern processing facilities for food production company Dunbia, prominently located on the A6 adjacent to Emp. Area 3: Walton Summit Employment Area (B2, B8) | Modern, good quality production units plus tom ancillary properties Further expansion is not possible without encroaching on surrounding Green Belt land | Critical mass: N/A Accessibility: Good Prominence: Good Environment: Good Total Grade: B/C | Protect in the Local Plan as a site for key local employer. |
| Emp. Area 7: North of School Lane (includes Whittle Movers) | Bamber Bridge | 4.40 | Backland industrial area, providing moderate quality sites and premises to a group of larger companies including Whittle Movers, Conlon and Hanson Cement (B1(a, c), B2, B8) | Backland industrial location. Premises appear well occupied by a range of relatively specialised businesses. Open sites in the area all appear in use for vehicle parking and open storage but may provide small scale infill sites in the future. Area bounded by other uses. | Critical mass: Average Accessibility: Average Prominence: Poor Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Emp. Area 8: Aston Moss | Leyland | 13.40 | Large, established industrial estate comprising a | Premises are uniformly of a high quality here and mostly comprise recent developments. | Critical mass: Good Accessibility: Good Prominence: Average | Protect strongly in the Local Plan as key local/county employment area |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|------------------------------------|------------|----------|--|--|---|--|
| SOUTH RIBBLE | | | | | | |
| | | | range of good quality mid-sized and large units in an out of town location. Adjacent to Emp. Area 11: Moss Side Employment Area and forming a linked industrial estate (B1(a, c), B2, B8) | Growth opportunities here will be provided by the development of Leyland (Moss Side) Test Track, which would provide 6.08 ha of B1/B2/B8 employment land to the immediate south west of this Employment Area. | Environment: Good Total Grade: B | for B1/B2/B8 (and appropriate ancillary) uses |
| Emp. Area 9: Leyland Business Park | Farington | 14.50 | Large industrial estate comprising a mix of partially refurbished older industrial premises and modern units. (B1(a, c), B2, B8) | Discussions with stakeholders suggests that some of the older (1960s) industrial buildings in the Business Park no longer meet modern requirements in terms of layout, lighting, parking, car parking and built structure. There is no evidence that occupiers are seeking to vacate these premises at this stage. Rather they are negotiating improvements with the site owner on an individual basis. However, there is a need for further investment in key properties before conditions deteriorate further. Over the long term there may be a need for selective redevelopment here to deliver a greater standard of property here. There are large areas of land in open storage use, across the Business Park which could provide infill development options. | Critical mass: Good Accessibility: Average Prominence: Average Environment: Average Total Grade: B/C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|---|---|--|---|
| SOUTH RIBBLE | | | | | | |
| Emp. Area 10: Lancashire (Enterprises) Business Park | Farington | 70.20 | Vary large established industrial estate including major manufacturing facilities for Leyland Trucks (Paccar) in the north, large new build logistics units in the south and a selection of smaller units in the south and west. (B1(a, b, c), B2, B8) | <p>Although based around the original Leyland Motors production facilities Lancashire (Enterprises) Business Park has seen a good standard of ongoing investment and modernisation of premises. As a result, there appears to be no areas of particularly low quality properties and, other than the new build logistic space, now significant areas of voids.</p> <p>In discussions, site owners LCC (Lancashire County Developments Limited (LCDL)) report the following issues which have been reported by tenants;</p> <ul style="list-style-type: none"> • Smells emerging from the adjacent Farington Waste Recovery Park. Also waste vehicles shedding materials • Objections to the service charge (£3.34/sqm) levied for the upkeep of estate roads • Issues of through traffic as drivers use the estate as a short cut between Farington and the A582. <p>In discussions, covered in more detail in Section 4.0, LCC/LCDL identifies demand for further office, industrial and warehouse premises here.</p> <p>LCC/LCDL indicated that it would be willing to support further development here. However, a lack of available funding means that it would likely only be for design and build options. Reflecting recent enquiries, this could be for industrial/warehouse options of 5,000-6,000 sqm for larger businesses, which could be sub-divided to provide smaller units of 500-600 sqm if this better met future needs.</p> <p>Undeveloped land in the south of the estate, west of Lancaster House was identified as a possible future development site.</p> | <p>Critical mass: Good Accessibility: Good Prominence: Good Environment: Good</p> <p>Total Grade: A</p> | Protect strongly in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses. |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|---|--|---|---|
| SOUTH RIBBLE | | | | | | |
| | | | | Emp. Area 10 also contains two local employment sites, two sites – EMP1(C): Adjacent to Farington Road, Farington and E2: Within Lancashire (Enterprises) Business Park, Farington – totalling 12.91 ha – which are owned by Leyland Trucks (Paccar). Whilst EMP1(C) is outside the secure Leyland Trucks site and could be made available to other occupiers, E2 is within the secure operational facility and would thus be more difficult to open up to support other firms. It is not clear if Leyland Trucks (Paccar) will require all of this land for its future growth, over the plan period at least. | | |
| Emp. Area 11: Moss Side Employment Area | Leyland | 26.70 | Large, established industrial estate comprising broad mix of premises, ranging from small workshops to large production facilities for occupiers such as Dr Oetker, in an out of town location. Adjacent to Emp. Area 8: Aston Moss and forming a linked industrial estate | Premises quality varies across the estate, but there are no areas of notably poor quality premises and no areas of multiple voids. As with Emp. Area 8, Growth opportunities here will be provided by the development of Leyland (Moss Side) Test Track, which would provide 6.08 ha of B1/B2/B8 employment land to the immediate south west of this Employment Area. | Critical mass: Good Accessibility: Good Prominence: Average Environment: Good Total Grade: B | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|---|--|---|--|
| SOUTH RIBBLE | | | | | | |
| | | | (B1(a, b, c), B2, B8) | | | |
| Emp. Area 12: Heaton Street/Talbot Road Industrial Estate | Leyland | 7.00 | Small backland industrial estate, providing budget and moderate quality industrial units to local micro businesses. Most of the east of the area is in use by C&W Berry for building supply storage and sales (B1(c), B2, B8) | The quality of space here varies, particularly in the north of Talbot Road where there are a number of lower quality properties and underused sites. However, the estate as a whole is well occupied, providing budget industrial space and, on Heaton Street, lock-up workshops. Land in the north of Talbot Road may provide a long term opportunity for infill and redevelopment. In the short/medium term it could provide expansion land for C&W Berry. The main future challenge could be, later in the Plan Period, the relocation of C&W Berry. That company occupies a collection of formally separate sites and workshop units, extending across Emp. Areas 12, 13 and 14. If completely vacated a sizable redevelopment site (12 ha) would become available. This would be a valuable employment development opportunity in the Leyland settlement area, but given the nature of the location and recent patterns of development along Golden Hill Lane there is likely to be strong pressure for housing development here. Indeed, a land sale for higher value uses may be essential in allowing C&W Berry to fund its future relocation and expansion. | Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Poor Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Emp. Area 13: Braconash Road Industrial Estate | Leyland | 3.40 | Linear row of mid-sized industrial units as well as a HQ premises for C&W Berry and | Small group of reasonable quality industrial units and a large office, all of which are in use. The former Anderton & Kitchen building has now been purchased by C&W Berry, for its own use (although it may be rented to another firm for a short period, until required). | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------|----------|---|---|--|--|
| SOUTH RIBBLE | | | | | | |
| | | | land in open storage use in the north (B1(a, c), B2, B8) | Issues associated with the possible relocation of C&W Berry are discussed in relation to Emp. Area 12 above. The north of the area also accommodates a large area of open storage for a construction company which could provide a future infill development site. | Total Grade: C | |
| Emp. Area 14: Tomlinson Road Industrial Estate | Leyland | 13.70 | Large backland industrial estate, dominated by larger industrial uses, including logistics properties for UPS and Parcel Force. The north west of the area is in use for open storage, for C&W Berry and others. (B1(c), B2, B8) | The developed parts of the area comprise moderate quality premises which are well used. Post 2020, the UPS depot may be occupied by landowner C&W Berry for its own use. Issues associated with the possible relocation of C&W Berry are discussed in relation to Emp. Area 12 above. The north of the area also accommodates several large areas of open storage, in use by other businesses. These could provide future infill development land, particularly if linked to the reuse of adjacent C&W Berry land. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Emp. Area 15: Centurion Way Estate | Farington | 4.5 | Linear terrace of budget quality light industrial and storage units (B1(c), B8) | While the quality of some units here is low, the estate as a whole is well occupied and provides a high density of employment, accommodating a wide range of local micro businesses, including some bad neighbour uses. It is particularly useful as a source of budget storage space. None – all land and premises appear to be in use. Site tightly bound by other uses. | Critical mass: Good Accessibility: Average Prominence: Good Environment: Poor Total Grade: C/D | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses |
| Emp. Area 16: Carr | Farington | 6.00 | Small estate of modern, high | Relatively new development of good quality industrial | Critical mass: Good | Protect in the Local Plan as local |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|------------------|----------|--|---|---|--|
| SOUTH RIBBLE | | | | | | |
| Lane | | | quality industrial units with the wider Centurion Way employment location (B1(c), B2, B8) | units, fully occupied at this time. One undeveloped site remains here, E2: Carr Lane, Farington (2.26 ha). Campbells Caravans has bought a long lease (250 years) on this site. Land likely to be used for caravan storage. | Accessibility: Average Prominence: Average Environment: Good Total Grade: B/C | employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Emp. Area 17: Land adjacent to Lancashire (Enterprises) Business Park | Farington | 12.9 | Western extension to the Lancashire (Enterprises) Business Park, now fully developed as Farington Waste Recovery Park for Global Renewables. Includes conference and education facilities. (B1(a), B2, B8) | Fully developed for a modern waste processing facility. 23.33 ha is potentially available in the adjacent local employment site, EMP1(D): Adjacent to Lancashire (Enterprises) Business Park, Farington. | Critical mass: N/A Accessibility: Average Prominence: Average Environment: Good Total Grade: B/C | Protect in the Local Plan as local employment area for a key local employer. |
| Emp. Area 18: Matrix Park | Buckshaw Village | 28.70 | Modern office and industrial park, completed alongside the wider Buckshaw Village mixed use area. In particular it is a | High quality, new build office and industrial scheme. No office or industrial building is fully vacant at present although some upper floor office premises are available in sub-divided properties. Two plots remain undeveloped here. Land in the north (Matrix Point, 0.49 ha) is under development for small workshop units. In the south a 0.7 ha plot at Matrix Office Park (Plot 1400) was recently sold to an adjacent | Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A | Protect strongly in the Local Plan as key local/county and regional employment area for B1/B2/B8 (and appropriate ancillary) uses |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|---|--------------|----------|--|---|---|--|
| SOUTH RIBBLE | | | | | | |
| | | | key source of larger office premises in the Borough. Area includes a pub/restaurant (B1(a, c), B2, B8) | occupier, North West Projects, for its own use. With the completion of these plots Emp. Area 18: Matrix Park will be fully developed | | |
| Emp. Area 19: Sherdley Road Industrial Estate | Lostock Hall | 4.00 | Small, budget quality industrial estate, located off the A582 and extending into the Lostock Hall settlement area. Much of the east and north of the estate is dominated by a single occupier, Lunar Caravans. (B1(c), B2, B8) | <p>Quality of the premises is generally low, particularly in the north, where the bulk of the space comprises a large sub-divided factory complex which is unlikely to meet modern requirements in terms of loading, eaves heights, access, etc.</p> <p>The immediate future of this location is dependent on Lunar Caravans. Lunar have expressed a strong desire to relocate and expand. If they do leave the area their complex site would be difficult to market to other users, either as a single site or as sub-divided units.</p> <p>At that time the future of this area would have to be reconsidered, possibly identifying opportunities for redevelopment and regeneration.</p> | <p>Critical mass: Average Accessibility: Average Prominence: Average Environment: Poor</p> <p>Total Grade: C/D</p> | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Emp. Area 20: Factory Lane Estate | Penwortham | 4.20 | Low quality, backland employment location in a mostly residential area adjacent to the railway | <p>Low quality, low density employment area. The economic value of this location is low, but land and property here remains in use by a range of local micro businesses.</p> <p>Location bounded by housing, sports facilities and the railway.</p> | <p>Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Poor</p> <p>Total Grade: D</p> | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |

| Area | Settlement | Size, ha | Description and Use Classes | Issues with voids or unviable premises Opportunities for Redevelopment/ expansion | Grading | Recommendations |
|--|----------------|---------------|--|---|--|--|
| SOUTH RIBBLE | | | | | | |
| | | | (B1(c), B2, B8) | | | |
| Emp. Area 21: Land North of Capitol Centre | Walton-le-Dale | 3.30 | Small trade park, in a single terrace of units, to the rear of the Capitol Centre retail park. (A1, B8, D2) | Although the quality of this premises is modest when compared to the retail park in the front, the properties are well occupied and appear to attract healthy levels of trade making good use of this backland retail pitch. None – all land and premises appear to be in use. Site tightly bound by other uses. | Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C | Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. |
| Total | | 344.60 | | | | |

Source: SRBC/BE Group, 2017

Appendix 11– Vacant Property Schedules

Chorley

For the purposes of this Study, the sub-area divisions of Chorley Borough are:

- **Chorley** (inc. Buckshaw Village)
- **Euxton, Coppull, Rural West** (e.g. Eccleston, Croston, Bretherton, Mawdesley, Charnock Richard)
- **Adlington, North** (e.g. Whittle-le-Woods, Heapey, Clayton-le-Woods, Clayton Green, Clayton Brook)
- **Rural East/North East** (Brindle, Rivington, Brinscall, Abbey Village, Hoghton).

| CHORLEY – INDUSTRIAL | | | | |
|---|------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Unit 43, Drumhead Road | Chorley/Buckshaw | LH | Moderate | 3,958 |
| Unit 23, Common Bank Industrial Estate | Chorley/Buckshaw | LH | Moderate | 2,472 |
| Unit 7A, Moorland Gate Business Park | Chorley/Buckshaw | LH | Moderate | 2,376 |
| Unit 24, Common Bank Industrial Estate | Chorley/Buckshaw | LH | Moderate | 1,106 |
| Unit 17, Yarrow Business Centre | Chorley/Buckshaw | LH | Budget | 1,022 |
| Petrie Building, Common Bank Industrial Estate | Chorley/Buckshaw | LH | Good | 624 |
| Warehouse, Yarrow Business Centre | Chorley/Buckshaw | LH | Budget | 557 |
| Unit 19, Yarrow Business Centre | Chorley/Buckshaw | LH | Budget | 510 |
| Unit 5, Harpers Lane/Botany Brow | Chorley/Buckshaw | LH | Good | 460 |
| Unit 2/3, Harpers Lane/Botany Brow | Chorley/Buckshaw | LH | Good | 196 |
| Unit 4, Harpers Lane/Botany Brow | Chorley/Buckshaw | LH | Good | 174 |
| Unit 1, Harpers Lane/Botany Brow | Chorley/Buckshaw | LH | Moderate | 150 |
| Unit 6, Roundhouse Court | Chorley/Buckshaw | LH | Good | 61 |
| Workshop F24/25, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 176 |
| Workshop U11, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 73 |
| Workshop 20B, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 59 |
| Workshop U13A, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 37 |

Source: BE Group, 2017

| CHORLEY – OFFICE | | | | |
|--|------------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Lingmell House, Water Street | Chorley/Buckshaw | LH | Moderate | 1,060 |
| First Floor, Great Bear Distribution Facility | Chorley/Buckshaw | LH | Moderate | 696 |
| Second Floor, Great Bear Distribution Facility | Chorley/Buckshaw | LH | Moderate | 696 |
| 32-34 St Thomas's Road | Chorley/Buckshaw | LH | Moderate | 351 |
| Unit A2, Buckshaw Office Park | Chorley/Buckshaw | LH | Moderate | 334 |
| 57-63 St Thomas's Road | Chorley/Buckshaw | LH | Moderate | 298 |
| 24 St Thomas's Road | Chorley/Buckshaw | FH | Moderate | 274 |
| Suite C1, Conway House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 183 |
| Office, Lancaster House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 183 |
| 23-59 St Thomas's Road | Chorley/Buckshaw | LH | Moderate | 172 |
| Unit 6, Chorley West Business Centre | Chorley/Buckshaw | LH | Moderate | 146 |
| Unit 3, Chorley West Business Centre | Chorley/Buckshaw | LH | Moderate | 145 |
| Suite 22, Railway House | Chorley/Buckshaw | LH | Moderate | 136 |
| 1 Ashfield Road | Chorley/Buckshaw | LH/FH | Moderate | 135 |
| 109 Market Street | Chorley/Buckshaw | FH | Moderate | 131 |
| Office, Market Street | Chorley/Buckshaw | LH | Moderate | 120 |
| Ground Floor Suite, Chorleian House | Chorley/Buckshaw | LH | Moderate | 95 |
| Suite 1, Windsor House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 79 |
| Unit 2A, Lower Healey Business Park | Chorley/Buckshaw | LH | Moderate | 56 |
| Suite 24, Railway House | Chorley/Buckshaw | LH | Moderate | 54 |
| Suite 2, Ground Floor, 11a-13 St George's Street | Chorley/Buckshaw | LH | Moderate | 34 |
| Suite A5, Arundel House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 30 |
| Suite 6, First Floor, 11a-13 St George's Street | Chorley/Buckshaw | LH | Moderate | 28 |
| Suite A4, Arundel House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 26 |
| Office, Market Street | Chorley/Buckshaw | LH | Moderate | 25 |
| Suite C3, Conway House, Ackhurst Business Park | Chorley/Buckshaw | LH | Moderate | 24 |
| Suite 1, Oak House, High Street | Chorley/Buckshaw | LH | Moderate | 22 |
| Suite 10, Railway House | Chorley/Buckshaw | LH | Moderate | 19 |
| Suite 12, Railway House | Chorley/Buckshaw | LH | Moderate | 18 |
| Suite 4, Railway House | Chorley/Buckshaw | LH | Moderate | 16 |
| Suite 5, First Floor, 11a-13 St George's Street | Chorley/Buckshaw | LH | Moderate | 9 |
| Office F21, First Floor, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 107 |
| Office F18, First Floor, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 100 |
| Office 3, Palatine Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 62 |
| Office 18, Arkwright Suite, Coppull Enterprise | Coppull | LH | Moderate | 28 |

| CHORLEY – OFFICE | | | | |
|--|-------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Centre, Mill Lane | | | | |
| Office 1A/1B, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 26 |
| Office 12, Palatine Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 21 |
| Office 7, Arkwright Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 12 |
| Office 13, Arkwright Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 12 |
| Office 4, Arkwright Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 11 |
| Office 10, Arkwright Suite, Coppull Enterprise Centre, Mill Lane | Coppull | LH | Moderate | 8 |
| 10/11 Adlington South Business Park | Adlington | LH | Moderate | 419 |
| First Floor, Ordnance House, East Terrace | Euxton | LH | Moderate | 201 |
| Unit D, Clayton Green Business Centre | North | LH/FH | Moderate | 223 |

Source: BE Group, 2017

Preston

For the purposes of this Study, the sub-area divisions of Preston Borough are:

- **Rural North – West of M6, Rural North – East of M6, City North East** (J31A, Sharoe Green, Fullwood, Deepdale)
- **City South East** (Ribbleson, Fushwick, Frenchwood)
- **City North West** (Ingol, Plungington)
- **West** (Ashton and surrounding rural)
- **Preston Central.**

| PRESTON – INDUSTRIAL | | | | |
|---|-----------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Units 6 and 20, Fylde Road Industrial Estate | Preston Central | LH | Moderate | 2,221 |
| Kent Street Mill, Kent Street | Preston Central | LH | Moderate | 1,401 |
| Unit, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 766 |
| Unit 1, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 743 |
| Unit 3, Greaves Street | Preston Central | FH | Budget | 722 |
| Chapel House, St Mary's Street | Preston Central | FH | Moderate | 534 |
| 5-7 Egbert Street | Preston Central | LH | Moderate | 469 |
| Unit 16/17, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 465 |
| Unit 3, North Road | Preston Central | LH | Moderate | 394 |
| Unit 3, Emmett Street | Preston Central | LH | Moderate | 392 |
| Unit 2, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 345 |
| 178 Fylde Road Industrial Estate | Preston Central | LH | Moderate | 331 |
| Unit 3, Atlas Foundry Estate | Preston Central | LH | Moderate | 247 |
| 2A Andrew Street | Preston Central | FH | Moderate | 116 |
| 37 St. Mary's Street | Preston Central | FH | Moderate | 104 |
| Unit 2, Cambridge Court | Preston Central | LH | Moderate | 102 |
| Unit 11a, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 91 |
| Trade Unit, Aqueduct Street | Preston Central | FH | Budget | 84 |
| 19 Manchester Road | Preston Central | FH | Moderate | 74 |
| Unit 5, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 56 |
| Unit, Aqueduct Mill, Aqueduct Street | Preston Central | LH | Budget | 37 |
| Oyston Mill, Strand Road | West | LH | Moderate | 2,400 |
| 52-54 Tulketh Road | West | FH | Budget | 245 |
| Chain Caul Way | West | LH | Moderate | 173 |
| Suite G6, Preston Technology Centre | West | LH | Moderate | 131 |
| Suite G2, Preston Technology Centre | West | LH | Moderate | 114 |
| Unit G2, Preston Technology Management Centre | West | LH | Moderate | 114 |
| Unit 13, Riversway Business Village | West | LH | Good | 112 |
| Unit 6B/C, Oxheys Industrial Estate | West | LH | Moderate | 88 |
| Pittman Way | City North East | LH | Moderate | 1,579 |

| PRESTON – INDUSTRIAL | | | | |
|--|-------------------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| 100 St George's Road | City North East | FH | Moderate | 484 |
| Longworth Street | City South East | LH | Moderate | 5,227 |
| 170 Ribbleton Lane | City South East | LH | Moderate | 1,616 |
| Unit C, Guild Trading Estate | City South East | LH | Moderate | 1,075 |
| Unit 9A, Astra Business Centre | City South East | LH | Good | 507 |
| Unit 5, Deepdale Mill | City South East | FH | Moderate | 441 |
| Unit 1 (Part), Wyder Court | City South East | LH | Moderate | 244 |
| Hi-Tech Industrial Unit, Astra Business Centre | City South East | LH | Good | 232 |
| Harrison Trading Estate | City South East | LH | Moderate | 158 |
| Unit 5B, Rough Hey Place | City South East | LH | Moderate | 93 |
| Unit 1, Oakenclough Mill | Rural North, East of M6 | LH | Budget | 2,325 |
| 82 Roman Way Industrial Estate | Rural North, East of M6 | LH | Moderate | 1,173 |
| 27 Inglewhite Road | Rural North, East of M6 | LH | Moderate | 1,227 |
| 70-71 Roman Way Industrial Estate | Rural North, East of M6 | LH | Moderate | 1,012 |
| Unit A72, Red Scar Business Park | Rural North, East of M6 | LH | Moderate | 203 |
| A Block, Red Scar Business Park | Rural North, East of M6 | LH | Moderate | 39 |
| Joiners Workshop, The Smithy | Rural North, West of M6 | LH | Budget | 190 |

Source: BE Group, 2017

| PRESTON – OFFICE | | | | |
|---|-----------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| London House, Primrose Hill | Preston Central | FH | Moderate | 2,548 |
| Harris Institute | Preston Central | FH/LH | Moderate | 1,756 |
| Bhailok Court, Pole Street | Preston Central | LH | Budget | 913 |
| First Floor, The Unicentre | Preston Central | LH | Moderate | 898 |
| 3-5 Lune Street | Preston Central | FH | Moderate | 745 |
| Fourth Floor, The Unicentre | Preston Central | LH | Moderate | 630 |
| Ground Floor, Building 1, West Strand | Preston Central | LH | Moderate | 552 |
| First Floor, Building 1, West Strand | Preston Central | LH | Moderate | 552 |
| Second Floor, Building 1, West Strand | Preston Central | LH | Moderate | 552 |
| Suite 5, Buckingham House, Glovers Court | Preston Central | LH | Moderate | 503 |
| Ground Floor, Building 4, West Strand | Preston Central | LH | Moderate | 474 |
| First Floor, Building 4, West Strand | Preston Central | LH | Moderate | 474 |
| 10/11 Camden Place | Preston Central | FH | Budget | 450 |
| First, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Second, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Third, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Fourth, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Fifth, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Sixth, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Seventh, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 368 |
| Ground, Elizabeth House, Preston Office Centre | Preston Central | LH | Moderate | 359 |
| Seventh, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 339 |
| Ground Floor Suite, Victoria House | Preston Central | LH | Budget | 334 |
| Fourth Floor Suite, Victoria House | Preston Central | LH | Budget | 334 |
| Fifth Floor Suite, Victoria House | Preston Central | LH | Budget | 334 |
| Eighth Floor Suite, Victoria House | Preston Central | LH | Budget | 334 |
| Ninth Floor Suite, Victoria House | Preston Central | LH | Budget | 334 |
| Ground Floor, Victoria House | Preston Central | LH | Moderate | 334 |
| Fourth Floor, Victoria House | Preston Central | LH | Moderate | 334 |
| Fifth Floor, Victoria House | Preston Central | LH | Moderate | 334 |
| Eighth Floor, Victoria House | Preston Central | LH | Moderate | 334 |
| Ninth Floor, Victoria House | Preston Central | LH | Moderate | 334 |
| Ninth, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 331 |
| First, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 330 |
| Second, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 330 |
| Third, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 330 |

| PRESTON – OFFICE | | | | |
|---|-----------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Eighth, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 330 |
| Tenth, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 328 |
| Fourth, Red Rose House, Preston Office Centre | Preston Central | LH | Moderate | 323 |
| Second Floor, Norwest Court | Preston Central | LH | Moderate | 308 |
| First Floor, Norwest Court | Preston Central | LH | Moderate | 308 |
| Derby House, 12 Winckley Square | Preston Central | LH | Good | 302 |
| Suite 4B, Buckingham House, Glovers Court | Preston Central | LH | Moderate | 290 |
| Second Floor, Marshall House | Preston Central | LH | Moderate | 287 |
| Fifth Floor, Marshall House | Preston Central | LH | Moderate | 287 |
| Seventh Floor, Marshall House | Preston Central | LH | Moderate | 287 |
| Third Floor, Guildhall House | Preston Central | LH | Moderate | 273 |
| Third Floor, Guildhall House | Preston Central | LH | Moderate | 273 |
| Urban Exchange, Mount Street | Preston Central | LH | Moderate | 256 |
| 1-2 Cross Street | Preston Central | LH | Moderate | 203 |
| Suite 4, Ringway House | Preston Central | LH | Moderate | 177 |
| Ground Floor, Suite 1, The Unicentre | Preston Central | LH | Moderate | 172 |
| Office Suite, The Chambers, Guildhall Street | Preston Central | LH | Moderate | 158 |
| Suite 3, The Chambers | Preston Central | LH | Moderate | 157 |
| Suite 3, Ringway House | Preston Central | LH | Moderate | 155 |
| Part Third Floor, Marshall House | Preston Central | LH | Moderate | 149 |
| Lower Ground Floor, Norwest Court | Preston Central | LH | Moderate | 148 |
| Part Eighth Floor, Marshall House | Preston Central | LH | Moderate | 139 |
| Connaught House, Mount Street | Preston Central | LH | Moderate | 139 |
| Ground, Charnley House, 13 Winckley Square | Preston Central | LH | Good | 126 |
| 33 Ribblesdale Place | Preston Central | LH | Moderate | 124 |
| 212 North Road | Preston Central | LH | Moderate | 122 |
| Suite 2, The Light Buildings, Walker Street | Preston Central | LH | Moderate | 122 |
| Part Fourth Floor, Guildhall House | Preston Central | LH | Moderate | 119 |
| Suite 6, Ringway House | Preston Central | LH | Moderate | 113 |
| 81 Fishergate | Preston Central | LH | Moderate | 110 |
| Suite 8, Ringway House | Preston Central | LH | Moderate | 108 |
| Suite 7, Ringway House | Preston Central | LH | Moderate | 103 |
| Second Floor, Hesketh Building | Preston Central | LH | Moderate | 99 |
| Second, Charnley House, 13 Winckley Square | Preston Central | LH | Good | 98 |
| First Floor, Hesketh Building | Preston Central | LH | Moderate | 92 |
| Suite 5, The Chambers, Guildhall Street | Preston Central | LH | Moderate | 75 |
| Suite 5, Business Centre, Marshall House | Preston Central | LH | Good | 72 |

| PRESTON – OFFICE | | | | |
|---|-----------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Suite 2, Ringway House | Preston Central | LH | Moderate | 66 |
| Suite 1, The Light Buildings, Walker Street | Preston Central | LH | Moderate | 63 |
| Suite 3, The Light Buildings, Walker Street | Preston Central | LH | Moderate | 56 |
| Suite 4, Business Centre, Marshall House | Preston Central | LH | Good | 56 |
| Suite 1, Ringway House | Preston Central | LH | Moderate | 54 |
| Suite 5, Ringway House | Preston Central | LH | Moderate | 54 |
| Suite 2, Business Centre, Marshall House | Preston Central | LH | Good | 47 |
| 32 Winckley Square | Preston Central | LH | Good | 46 |
| Suite 6, 25 Winckley Square | Preston Central | LH | Good | 44 |
| Suite 3A, Recycling Lives Centre | Preston Central | LH | Good | 41 |
| Suite 2H, Buckingham House, Glovers Court | Preston Central | LH | Moderate | 39 |
| Suite 1/2, 25 Winckley Square | Preston Central | LH | Good | 35 |
| Suite 1, Business Centre, Marshall House | Preston Central | LH | Good | 31 |
| Suite 7, 25 Winckley Square | Preston Central | LH | Good | 29 |
| Office Suite 1, East Cliff | Preston Central | LH | Good | 28 |
| Office Suite 3, East Cliff | Preston Central | LH | Good | 28 |
| Suite 2D, Buckingham House, Glovers Court | Preston Central | LH | Moderate | 25 |
| Suite 3, Business Centre, Marshall House | Preston Central | LH | Good | 23 |
| Suite 8, 25 Winckley Square | Preston Central | LH | Good | 20 |
| Suite 3G, Recycling Lives Centre | Preston Central | LH | Good | 20 |
| Suite 3E, Recycling Lives Centre | Preston Central | LH | Good | 20 |
| Suite 3D, Recycling Lives Centre | Preston Central | LH | Good | 20 |
| Suite 3C, Recycling Lives Centre | Preston Central | LH | Good | 20 |
| Suite 3B, Recycling Lives Centre | Preston Central | LH | Good | 20 |
| Suite 3P, Recycling Lives Centre | Preston Central | LH | Good | 18 |
| Suite 3N, Recycling Lives Centre | Preston Central | LH | Good | 18 |
| Suite 3M, Recycling Lives Centre | Preston Central | LH | Good | 18 |
| Office Suite 2, East Cliff | Preston Central | LH | Good | 6 |
| Old Docks House, 90 Watery Lane | West | FH | Moderate | 1,121 |
| Unit 3/4, Albert Edward House | West | LH | Moderate | 725 |
| Suite 6, Edward VII Quay, Navigation Way | West | LH | Moderate | 494 |
| Unit 1, Tustin Court | West | LH | Moderate | 493 |
| Unit 2, Tustin Court | West | LH | Moderate | 471 |
| Suite 4B, Edward VII Quay, Navigation Way | West | LH | Moderate | 400 |
| Suite 5A, Edward VII Quay, Navigation Way | West | LH | Moderate | 400 |
| Suite 5B, Edward VII Quay, Navigation Way | West | LH | Moderate | 400 |
| Second Floor, Unit 6, Albert Edward House | West | LH | Moderate | 344 |

| PRESTON – OFFICE | | | | |
|--|------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Suite 7A, Edward VII Quay, Navigation Way | West | LH | Moderate | 300 |
| 179 Eldon Street | West | FH | Moderate | 294 |
| Dockland House, Anchorage Business Park | West | LH | Moderate | 262 |
| Brick Barn, Cliftonfields | West | LH | Moderate | 232 |
| Quayside House, Navigation Way | West | LH | Good | 231 |
| Ground Floor, East Barn, Cliftonfields | West | LH | Moderate | 187 |
| First Floor, East Barn, Cliftonfields | West | LH | Moderate | 187 |
| Unit 5, Nelson Court Business Centre | West | LH | Good | 186 |
| Ground Floor, Unit 1, Albert Edward House | West | LH | Moderate | 176 |
| First Floor, Unit 1, Albert Edward House | West | LH | Moderate | 176 |
| The Root House, Cliftonfields | West | LH | Moderate | 160 |
| Suite F25, Preston Technology Centre | West | LH | Moderate | 106 |
| Office 4, Unit 7/9, Lockside Office Park | West | LH | Good | 100 |
| Unit 9, Riversway Business Village | West | LH | Good | 95 |
| Unit 1, The Incubator House, Cliftonfields | West | LH | Moderate | 91 |
| Big Shippon, Cliftonfields | West | LH | Moderate | 90 |
| The Old Dairy, Cliftonfields | West | LH | Moderate | 71 |
| Provender House, Cliftonfields | West | LH | Moderate | 70 |
| Granary, Cliftonfields | West | LH | Moderate | 70 |
| Stables, Cliftonfields | West | LH | Moderate | 70 |
| Suite 3, Cottam Lane Business Centre | West | LH | Budget | 63 |
| Suite 5, Cottam Lane Business Centre | West | LH | Budget | 63 |
| Unit 6, The Old Pigsties, Cliftonfields | West | LH | Moderate | 63 |
| Suite G13, Preston Technology Centre | West | LH | Moderate | 61 |
| Unit 4, The Corner Shippon, Cliftonfields | West | LH | Moderate | 60 |
| Suite F23, Preston Technology Centre | West | LH | Moderate | 56 |
| Unit 3, The Bull Pen, Cliftonfields | West | LH | Moderate | 55 |
| Unit 12, Navigation Business Village | West | FH/LH | Moderate | 53 |
| Suite G11, Preston Technology Centre | West | LH | Moderate | 52 |
| Suite G12, Preston Technology Centre | West | LH | Moderate | 52 |
| Unit 2, The Loose Box, Cliftonfields | West | LH | Moderate | 47 |
| Unit 5, The Cart Shed, Cliftonfields | West | LH | Moderate | 47 |
| Suite G14, Preston Technology Centre | West | LH | Moderate | 45 |
| Suite F19, Preston Technology Centre | West | LH | Moderate | 40 |
| Suite F17, Preston Technology Centre | West | LH | Moderate | 32 |
| Office 2, Unit 7/9, Lockside Office Park | West | LH | Good | 32 |
| Suite F27E, Preston Technology Centre | West | LH | Moderate | 28 |

| PRESTON – OFFICE | | | | |
|---|-------------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Suite F27D, Preston Technology Centre | West | LH | Moderate | 25 |
| Suite F27C, Preston Technology Centre | West | LH | Moderate | 21 |
| Unit 24, Riversway Business Village | West | LH | Good | 21 |
| Unit 26, Riversway Business Village | West | LH | Good | 21 |
| Suite F27A, Preston Technology Centre | West | LH | Moderate | 20 |
| Suite F27F, Preston Technology Centre | West | LH | Moderate | 20 |
| Office 1, Unit 7/9, Lockside Office Park | West | LH | Good | 20 |
| Office 3, Unit 7/9, Lockside Office Park | West | LH | Good | 16 |
| First Floor Office, Fullwood Office Park | City North East | LH | Moderate | 497 |
| Muirfield, Fairways Office Park | City North East | LH | Moderate | 381 |
| East Wing, Derby House | City North East | LH | Moderate | 346 |
| Birkdale, Fairways Office Park | City North East | FH/LH | Moderate | 336 |
| Wentworth, Fairways Office Park | City North East | FH/LH | Moderate | 336 |
| Turnberry, Fairways Office Park | City North East | FH/LH | Moderate | 189 |
| Unit 4, Fairways Office Park | City North East | LH | Moderate | 177 |
| Derby House Chambers | City North East | LH | Moderate | 32 |
| Building 1, Fleming Way | City North East | LH | Moderate | 1,175 |
| Beech House, Forest Green | City North East | LH | Moderate | 338 |
| 7 Cable Court, Pittman Way | City North East | FH | Moderate | 140 |
| Unit 6/7, Eastway Business Village | City North East | FH/LH | Moderate | 123 |
| Unit 3, Eastway Business Village | City North East | LH | Moderate | 107 |
| Unit 8, Eastway Business Village | City North East | LH | Moderate | 107 |
| Unit 16, Eastway Business Village | City North East | LH | Moderate | 93 |
| 80 St George's Road | City North East | FH | Moderate | 89 |
| Unit 7, Bartle Court | City North West | LH | Moderate | 120 |
| Unit 8, Bartle Court | City North West | LH | Moderate | 120 |
| Unit 2, Bartle Court | City North West | LH | Moderate | 120 |
| First Floor, Unit 11, Bartle Court | City North West | LH | Moderate | 81 |
| The Watermark, Ribbleton Lane | City South East | FH | Moderate | 1,858 |
| Watling Street Road | City South East | FH | Moderate | 853 |
| Unit D, Astra Business Centre | City South East | LH | Moderate | 524 |
| Unit A, Astra Business Centre | City South East | LH | Moderate | 60 |
| Unit A6, Astra Business Centre | City South East | LH | Good | 28 |
| Unit A10, Astra Business Centre | City South East | LH | Good | 23 |
| Second Floor, The Lancashire Hub | Rural North, East of M6 | LH | Moderate | 976 |
| First Floor, Unit 4B, Millennium City Office Park | Rural North, East of M6 | LH | Moderate | 240 |
| Part Third Floor, The Lancashire Hub | Rural North, East of M6 | LH | Moderate | 190 |

| PRESTON – OFFICE | | | | |
|--|-------------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Ground Floor, Suite 5E, Millennium City Park | Rural North, East of M6 | LH | Moderate | 111 |
| Unit 3, 523 Garstang Road | Rural North, West of M6 | LH | Moderate | 94 |
| Unit 2, 523 Garstang Road | Rural North, West of M6 | LH | Moderate | 63 |

Source: BE Group, 2017

South Ribble

For the purposes of this Study, the sub-area divisions of South Ribble Borough are:

- **Bamber Bridge/Cuerden, Leyland/Farington** (inc. Moss Side and Matrix Park, Buckshaw Village)
- **Lostock Hall, Penwortham, Rural West** (e.g. New Longton, Longton, Hutton, Walmer Bridge, Much Hoole),
- **Samlesbury and Rural East, Walton Summit.**

| SOUTH RIBBLE – INDUSTRIAL | | | | |
|---|-----------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Ex Prestoplan, 366 Walton Summit Centre | Walton Summit | LH | Moderate | 8,069 |
| Summit 86, Walton Summit Centre | Walton Summit | LH | Moderate | 8,000 |
| Phase 1, Lancashire Business Park | Leyland/Farington | LH | Good | 7,112 |
| Unit 1, Eaton Avenue | Leyland/Farington | LH | Good | 4,410 |
| Unit 9, Enterprise Court, Leyland Business Park | Leyland/Farington | LH | Moderate | 4,279 |
| 1-4 Charnley Fold Lane | Bamber Bridge/Cuerden | FH | Moderate | 3,989 |
| 148 Brierley Road | Bamber Bridge/Cuerden | LH | Moderate | 3,879 |
| Walton Summit Centre | Walton Summit | LH | Moderate | 3,716 |
| Unit A, Matrix Park | Leyland/Farington | LH | Good | 1,966 |
| Unit 2, Moss Side Industrial Estate | Leyland/Farington | LH | Moderate | 1,854 |
| Summit House, Bannister Hall Works | Walton Summit | LH | Moderate | 1,637 |
| 1-3 Peregrine Place | Leyland/Farington | FH/LH | Moderate | 1,284 |
| Unit D3/4, Matrix Park | Leyland/Farington | LH | Good | 1,265 |
| 464 Ranglet Road, Walton Summit | Walton Summit | FH/LH | Moderate | 1,217 |
| Unit 5, The Old Mill Industrial Estate | Bamber Bridge/Cuerden | LH | Moderate | 885 |
| 14/15 Charnley Fold Lane | Bamber Bridge/Cuerden | LH | Moderate | 850 |
| Unit 2, Lincoln Park | Bamber Bridge/Cuerden | LH | Moderate | 762 |
| Hurstwood Court, Lancashire Business Park | Leyland/Farington | LH | Moderate | 714 |
| Unit 439, Oakshot Place, Walton Summit | Walton Summit | LH | Moderate | 629 |
| Unit 432, Walton Summit Road | Walton Summit | LH | Moderate | 462 |
| Unit 1/2, Kings Court | Leyland/Farington | LH | Moderate | 439 |
| Unit 9, Heaton Street | Leyland/Farington | LH | Moderate | 436 |
| Warehouse Unit, Whalley Street | Bamber Bridge/Cuerden | FH | Moderate | 434 |

| SOUTH RIBBLE – INDUSTRIAL | | | | |
|--|-----------------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| 9D Hurstwood Court, Lancashire Business Park | Leyland/Farington | LH | Moderate | 357 |
| 22 Charnley Fold Lane | Bamber Bridge/Cuerden | LH | Moderate | 332 |
| 348 Station Road | Bamber Bridge/Cuerden | FH | Budget | 327 |
| Unit 495, Walton Summit Industrial Area | Walton Summit | LH | Moderate | 316 |
| Unit 496, Walton Summit Industrial Area | Walton Summit | LH | Moderate | 316 |
| Unit 471, Walton Summit Industrial Area | Walton Summit | LH | Moderate | 310 |
| Unit A 246, Oldfield Road, Walton Summit | Walton Summit | LH | Moderate | 284 |
| Warehouse Unit, South Rings Business Park | Bamber Bridge/Cuerden | LH | Good | 276 |
| 9E Hurstwood Court, Lancashire Business Park | Leyland/Farington | LH | Moderate | 260 |
| Unit 8, Kenyons Business Park | Bamber Bridge/Cuerden | LH | Moderate | 231 |
| Unit 8, Killthorpe Farm | Rural West | LH | Moderate | 221 |
| Unit 335, Walton Summit Industrial Area | Walton Summit | LH | Moderate | 210 |
| Unit 434, Walton Summit Industrial Area | Walton Summit | LH | Moderate | 206 |
| 19 Charnley Fold Lane | Bamber Bridge/Cuerden | LH | Moderate | 178 |
| Unit 3E, Crossley Industrial Estate | Penwortham | LH | Moderate | 167 |
| Unit 52, The Old Mill Industrial Estate | Bamber Bridge/Cuerden | LH | Moderate | 157 |
| Unit 3, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 146 |
| Unit 6A, Bannister Hall Works | Samlesbury/Rural East | LH | Budget | 105 |
| Unit 25, Momentum Business Centre | Bamber Bridge/Cuerden | LH | Good | 103 |
| Unit 44, The Old Mill Industrial Estate | Bamber Bridge/Cuerden | LH | Moderate | 102 |
| Unit 31, The Old Mill Industrial Estate | Bamber Bridge/Cuerden | LH | Moderate | 98 |
| Unit 22, Tomlinson Road Business Park | Leyland/Farington | LH | Moderate | 87 |
| Unit 17A, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 83 |
| Unit 53/36/2, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 59 |
| Unit 8, Heaton Street | Leyland/Farington | LH | Moderate | 52 |
| Unit 7, Heaton Street | Leyland/Farington | LH | Moderate | 52 |
| Unit 50, The Old Mill Industrial Estate | Bamber Bridge/Cuerden | LH | Moderate | 51 |
| Unit 38/57, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 45 |
| Unit 41, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 30 |
| Unit 45, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 25 |
| Unit 5, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 8, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 44, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 27, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 31, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 33, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 35, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |

| SOUTH RIBBLE – INDUSTRIAL | | | | |
|---|----------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Unit 59, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 60, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 100F, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 46, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 49, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 22 |
| Unit 56, South Ribble Enterprise Park | Walton-le-Dale | LH | Moderate | 17 |

Source: BE Group, 2017

| SOUTH RIBBLE – OFFICE | | | | |
|---|-----------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Suite 1B, Ribble House | Bamber Bridge/Cuerden | LH | Moderate | 489 |
| First Floor, Unit 20, Sceptre Court | Bamber Bridge/Cuerden | LH | Moderate | 452 |
| 20 Sceptre Court | Bamber Bridge/Cuerden | LH | Moderate | 439 |
| Unit 8, Sceptre Court | Bamber Bridge/Cuerden | LH | Moderate | 302 |
| Suite 3E, Ribble House | Bamber Bridge/Cuerden | LH | Moderate | 236 |
| Unit A, Craven Drive, South Rings Business Park | Bamber Bridge/Cuerden | LH | Moderate | 138 |
| Unit B, Craven Drive, South Rings Business Park | Bamber Bridge/Cuerden | LH | Moderate | 138 |
| Unit D, Craven Drive, South Rings Business Park | Bamber Bridge/Cuerden | LH | Moderate | 138 |
| Unit E, Craven Drive, South Rings Business Park | Bamber Bridge/Cuerden | LH | Moderate | 138 |
| Unit 2, Momentum Business Centre | Bamber Bridge/Cuerden | LH | Moderate | 68 |
| Unit 3, Momentum Business Centre | Bamber Bridge/Cuerden | LH | Moderate | 68 |
| Unit 4, Momentum Business Centre | Bamber Bridge/Cuerden | LH | Moderate | 68 |
| Unit 5, South Preston Office Village | Bamber Bridge/Cuerden | LH | Moderate | 68 |
| Office 6A, South Preston Office Village | Bamber Bridge/Cuerden | LH | Moderate | 60 |
| Unit 5, Momentum Business Centre | Bamber Bridge/Cuerden | LH | Moderate | 59 |
| Valley Centre, Fourfields | Bamber Bridge/Cuerden | LH | Moderate | 40 |
| Lancaster House | Leyland/Farington | LH | Moderate | 5,202 |
| Office, Leyland House | Leyland/Farington | LH | Moderate | 405 |
| ITL House/School House | Leyland/Farington | LH | Moderate | 347 |
| Office, Leyland House | Leyland/Farington | LH | Moderate | 268 |
| 1&2 The Gatehouse, Leyland Business Park | Leyland/Farington | LH | Moderate | 211 |
| Office, RFI House | Leyland/Farington | LH | Moderate | 141 |
| Office, Unit A, Earnshaw Business Centre | Leyland/Farington | LH | Moderate | 139 |
| First Floor, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 137 |
| Office Suite 2, Hastings Road | Leyland/Farington | LH | Moderate | 134 |
| Suite 1, Balfour Court | Leyland/Farington | LH | Moderate | 126 |
| Chandler House, Talbot Road | Leyland/Farington | LH | Moderate | 98 |
| Office 4/5, Leyland House | Leyland/Farington | LH | Moderate | 76 |
| Basement, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 75 |
| 1-2 Leyland House, Leyland Business Park | Leyland/Farington | LH | Moderate | 75 |
| Office Suite 1, Hastings Road | Leyland/Farington | LH | Moderate | 65 |
| Room B, Stonehouse School | Leyland/Farington | LH | Moderate | 57 |
| St Ct Office 1-4 , Centurion House, Leyland BP | Leyland/Farington | LH | Good | 51 |
| 21/23, Croston House, Leyland Business Park | Leyland/Farington | LH | Moderate | 51 |
| Office 16, Croston House, Leyland Business Park | Leyland/Farington | LH | Moderate | 51 |
| St Ct Office A, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 46 |

| SOUTH RIBBLE – OFFICE | | | | |
|---|-------------------|--------|----------|------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Room 1, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 41 |
| Suite 3, Hamilton House, Leyland Business Park | Leyland/Farington | LH | Moderate | 41 |
| Room A, Stonehouse School | Leyland/Farington | LH | Moderate | 41 |
| Suite A, 6-10 Hough Lane | Leyland/Farington | LH | Moderate | 39 |
| Room D, Stonehouse School | Leyland/Farington | LH | Moderate | 38 |
| Office FF 10-11, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 37 |
| Office 14, Leyland House, Leyland Business Park | Leyland/Farington | LH | Moderate | 35 |
| Office 15, Croston House, Leyland Business Park | Leyland/Farington | LH | Moderate | 34 |
| Office 13, Croston House, Leyland Business Park | Leyland/Farington | LH | Moderate | 32 |
| Room C, Stonehouse School | Leyland/Farington | LH | Moderate | 33 |
| Office 37, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 33 |
| Office FF 8-9, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 33 |
| Office FF 2-3, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 33 |
| Office FF 4-5, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 33 |
| Annexe 3, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 28 |
| Room 4, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 27 |
| Office FF B2, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 26 |
| Room 3, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 23 |
| Suite 2, Hamilton House, Leyland Business Park | Leyland/Farington | LH | Moderate | 23 |
| Office 41, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 20 |
| St Ct Office 6, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 20 |
| Office 1&2, Occleshaw House | Leyland/Farington | LH | Good | 19 |
| Office 10, Occleshaw House | Leyland/Farington | LH | Good | 19 |
| Room E, Stonehouse School | Leyland/Farington | LH | Moderate | 17 |
| Office 46, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 17 |
| Room 2, Trafford Building, Easy Street | Leyland/Farington | LH | Good | 16 |
| Office 42, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 16 |
| Office FF 6, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 16 |
| Office FF 7, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 16 |
| Office 1, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 15 |
| Office 2, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 15 |
| Annexe 4, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 14 |
| Annexe 5, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 14 |
| Office 8, Crescent House | Leyland/Farington | LH | Good | 13 |
| Office 11, Occleshaw House | Leyland/Farington | LH | Good | 13 |
| Office 12, Occleshaw House | Leyland/Farington | LH | Good | 13 |
| St Ct Office B, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 12 |

| SOUTH RIBBLE – OFFICE | | | | |
|---|-----------------------|---------------|----------------|-------------------|
| Property | Area | Tenure | Quality | Size (sqm) |
| Office 9, Occleshaw House | Leyland/Farington | LH | Good | 11 |
| Office 30, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 9 |
| St Ct Office 5, Centurion House, Leyland BP | Leyland/Farington | LH | Good | 9 |
| Office 14, Crescent House | Leyland/Farington | LH | Good | 45 |
| Office FF 15, Crescent House | Leyland/Farington | LH | Good | 24 |
| Factory Lane Business Park | Penwortham | LH | Budget | 93 |
| Office Suite, Factory Lane Business Park | Penwortham | LH | Moderate | 74 |
| Office 3, Ground Floor, Crossley House | Penwortham | LH | Moderate | 34 |
| Office 1, Ground Floor, Crossley House | Penwortham | LH | Moderate | 19 |
| Office 4, First Floor, Crossley House | Penwortham | LH | Moderate | 19 |
| Office 6, First Floor, Crossley House | Penwortham | LH | Moderate | 17 |
| Office 7, First Floor, Crossley House | Penwortham | LH | Moderate | 17 |
| Office 2, Ground Floor, Crossley House | Penwortham | LH | Moderate | 14 |
| Office 5, First Floor, Crossley House | Penwortham | LH | Moderate | 14 |
| Ground Floor, Jackson House | Rural West | LH | Moderate | 103 |
| Unit 12, Swallow Park | Rural West | LH | Moderate | 46 |
| Unit 13, Swallow Park | Rural West | LH | Moderate | 46 |
| Unit 18, Swallow Park | Rural West | LH | Moderate | 46 |
| Unit 2B, The Mansions | Rural West | LH | Moderate | 36 |
| Office, Bannister Hall Works | Samlesbury/Rural East | LH | Moderate | 34 |
| Office 1, South Ribble Enterprise Park | Walton-le- Dale | LH | Moderate | 11 |
| 481 Ranglet Road | Walton Summit | LH | Moderate | 231 |

Source: BE Group, 2017