

Cheshire West & Chester Council

Local Plan

Employment Land Study

Update 2013

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Cheshire West
and Chester

Employment Land Study Update 2013: Main Report

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1 Introduction

Introduction

1.1 This report assesses the supply and demand for employment land (falling within Use Classes Order as amended 1987, Class B - office, research and development, light industry, general industrial and storage/distribution) within Cheshire West and Chester. It reviews and updates the findings of the Employment Land and Premises Study (BE Group, 2009). The study is intended to provide robust evidence to underpin and inform the future allocation of land in the Cheshire West and Chester Local Plan to 2030.

1.2 The National Planning Policy Framework (NPPF) requires Local Authorities to contribute towards the achievement of sustainable development in both plan making and decision making⁽ⁱⁱⁱ⁾. In doing so, the planning system can perform an economic role by ensuring sufficient land of the right type is available in the right places and at the right time to support growth and innovation. 'Economic Development' is defined as; "*Development, including those within the B Use Classes, public and community uses and main town centre uses (but excluding housing development)*". It should be noted that future jobs growth may not necessarily fall within the B-use classes (as covered by this study) and may be driven by other sectors of the economy. It may apply to development which (i) provides employment opportunities, (ii) generates wealth and (iii) produces an economic output/product.

1.3 This Employment Land Review is a technical document to inform future policy development. It does not determine whether any site should be allocated as that will be determined through the Local Plan, or through a planning application. Planning applications will continue to be treated on their own individual merits. They will be determined in accordance with planning policies contained within the adopted Development Plan, unless material considerations indicate otherwise.

Methodology

1.4 The Study takes account of the findings and recommendations from the Employment Land and Premises Study (BE Group, 2009). This stated the need to review and monitor the position in 2012, given the background of local government reorganisation, economic uncertainty/recession and emerging policy changes.

1.5 A range of data sources have been used to inform the Employment Land Study update including:

- A review of policy changes since 2009 at a national, regional and local level. This considers the growth and regeneration priorities for the area as identified through the Local Enterprise Partnership and the Council's regeneration strategies. It also reviews the employment land position in neighbouring Authority areas.
- A property market and business needs analysis has been undertaken involving primary research and consultation with key stakeholders (agents, developers, landowners and businesses).

iii NPPF, March 2012, para. 6-7

- Data on recent property market trends, including public sector enquiry analysis and property supply (i.e availability of vacant office and industrial premises).
- A review of the current undeveloped employment land supply in the Borough.
- A review of historic employment land take up and economic forecasting (based on the Cheshire Halton and Warrington Economic Model to assess future demand for employment land.
- A 'call for sites' exercise invited property market stakeholders to submit potential new employment sites for consideration through the Local Plan. These sites have been assessed in the context of their suitability and availability for employment use.

1.6 The Update aligns with the ODPM Employment Land Review Guidance Note (December 2004)^(iv) and follows the following key stages:

- Stage 1: Taking stock of the existing situation
- Stage 2: Creating a picture of future requirements
- Stage 3: Identifying a new portfolio of sites

1.7 The Study uses a base date of 1st April 2013 in the assessment of employment land supply and demand and covers large sites greater than 0.25ha (or 500m²).

1.8 In line with the National Planning Policy Framework, this Employment Land Study update has been considered alongside the full update of the Strategic Housing Land Availability Assessment Update.

iv The External Review of Government Planning Practice Guidance (December 2012) recommended retention of the Employment Land Review Guidance until replaced by revised guidance is published.

2 Background

2.1 This section provides a review of the study area and key background documents relating to the Borough's economy. It sets the context within which future Local Plan policies and future allocations should be considered.

2.2 It is necessary to understand the nature of the Borough's economy, i.e. the size of the economy, the type and location of existing businesses, in order to plan for suitable employment opportunities in the future. CWaC is the fourth largest authority in the north west of England and covers approximately 916km² and has a population of 326,236^(v). The Borough includes significant heritage assets particularly in the city of Chester and Northwich. Significant and diverse industries are operational in Ellesmere Port with a considerable presence of automotive, chemical and engineering sectors. Nationally significant salt mining is operational in Winsford which also provides underground document and waste storage.

2.3 Cheshire West and Chester's diverse role in the north west is highlighted in the report 'Housing and Economic Development Evidence Base Overview Study.'^(vi) The report notes that the key economic and housing markets operating in the area do not follow administrative boundaries. The Borough performs a range of functions in the Liverpool City Region.

2.4 Unemployment in the Borough has steadily increased since December 2004 (3.2%) to a peak in March 2010 (7.2%). There have been small scale fluctuations around this level over recent years and the current unemployment rate for the Borough is 6.4% (September 2011).^(vii) There has been a significant decline in the number of people employed in manufacturing industries across the Borough, from 20.8% in 1996 to 9.9% in 2008. During the same period, jobs in the construction industry remained relatively constant from 4-6.5%, whereas there has been a 10.2% increase in jobs in service industries, from 73.2% in 1996 to 83.4% in 2008.^(viii)

2.5 Cheshire West and Chester is not immune to the effects of the recession; the global, national and local economic climate represents a key challenge for the future. The Borough has so far fared better than other places, however there are some underlying trends. Evidence suggests that the total number of employees in the Borough has declined for the last 2 years with the data available (2008-2010). However, this decline should be considered within the context of the North West and national averages over the same period. Employment in business services, chemicals and chemical products, financial services and manufacturing - all key sectors for driving growth - have showed a lack of growth recently despite still being comparative strengths for the Borough overall. Data suggests that the number of new businesses starting up in the Borough has been declining, reflecting the national trend, although this decline appears to be slowing. Based on the latest available figures, the Borough performs slightly below the national average in terms of percentage changes year on year for active enterprises in the

v Source: 2011 Census

vi Housing and Economic Development Evidence Base Overview Study, Final Research Report, Liverpool City Region Partners, May 2011

vii ONS Annual Population Survey

viii ONS Annual Business Inquiry employee analysis

Borough. The Borough appears to be performing in line with the North West average on business survival rates.

Cheshire West and Chester Local Economic Assessment - Story of Place (February 2011)

2.6 This document provides an economic profile of the Borough. It recognises that Cheshire West and Chester is not a single economic geography, it lies between the urban centres of Liverpool and Manchester. The area is considered an attractive residential area, but there is a high level of out commuting to earn higher wages. The study states that the nature of the economy in the Borough is increasingly insufficient to provide the type of employment required to support buying a house in the area.

2.7 Over the last decade, the economy of the Borough has performed well and GVA per head for Cheshire as a whole is above the national average. Despite the growth of the UK economy during the last decade, employment in CWAC in 2008 was marginally below the level recorded in 2003. The area recorded more than 2,000 fewer private sector jobs in 2008 compared to 2002/3.

2.8 The economy of Cheshire West and Chester is diverse; Chester area reliant on the service sector, Ellesmere Port retains strengths in manufacturing although half of its manufacturing employment has been lost over the last decade. The strongest economic growth over the last five years has been in the Weaver towns of Northwich and Winsford, primarily focused on service sector employment. Chemical manufacturing, oil refining and motor manufacture remains important when compared to the national average for employment in these sectors.

2.9 The rate of growth of VAT registered businesses in CW&C is ahead of the national average. However, business registrations per head of population also suggest that entrepreneurialism is at a lower rate than for England as a whole. In terms of future growth, sectors which are likely to generate employment growth (e. g IT services, software, media, energy and pharmaceuticals) are relatively poorly represented within Cheshire West and Chester.

2.10 A long term economic issue for the Borough is identified as the ageing population and slow population growth. With an anticipated reduction in household size as a result of economic and social trends, if housing numbers stay the same, the population can be expected to decline. The distribution of the population leads to a high level of commuting. Although there is not a uniform distribution of a strong labour market and there are some areas of deprivation in the Borough, there is a strong labour market.

2.11 Cheshire West and Chester's strengths are that it is an attractive residential location, with strong transport connections and an economic base that includes some highly visible and large employers. However, weaknesses identified a reliance on a small number of large industries and significant employers. Sectors attributed to future economic growth are poorly represented. Future opportunities note the important focus of employment in Chester, which currently has significant in-commuting. It also provides a service centre location for north east Wales. The brand of Chester and good transport infrastructure is likely to generate continued investment.

Mersey Dee Alliance (MDA)

2.12 The Mersey Dee Alliance is a partnership group comprising local authorities across the west Cheshire and north east Wales areas. The North East Wales / West Cheshire / Wirral area is unique in the UK as a major economic area divided by a national boundary. The area has a great diversity of businesses and a metro economy as well as a large rural hinterland and coastal commuter belt and is a major contributor to the UK economy.

2.13 The partnership recognises that the area represents a single economic sub-region with a population of close to 1 million. Partners agree to work together on common strategic interests to ensure a sustainable future for the area, and facilitate a coherent approach to social, economic and environmental issues.

2.14 The MDA has recently commissioned work on a detailed Sectors Study (2012), to identify the key sectors that are likely to drive future economic growth in the sub region. This considers spatial and sectoral evidence to inform future policy making. It identifies that the Mersey Dee area supports over 380,000 jobs and over 27,000 registered companies. The largest contribution to economic output in the area is from production, manufacturing accounts for almost a quarter of the GVA generated in the Mersey Dee area. The nature of these activities varies by local authority area, with the automotive industries being concentrated in Cheshire West and Chester. This would support further engineering, design, maintenance and support activities in the future. This is dominated by the presence of Vauxhall Motors in Ellesmere Port. However, the area is not completely reliant on manufacturing. Financial industries are well represented in the Chester area and construction activities span all local authorities. Chemicals, petrochemicals and minerals sectors are also important to the local economy.

Cheshire and Warrington Local Economic Assessment (June 2011)

2.15 This study provided updated intelligence on the Cheshire & Warrington economy and on issues that affect economic activity. It includes evidence on a wide range of topics, including population, the labour market, qualifications and skills, enterprise, housing, commercial land and property, social inclusion, quality of life, culture, tourism, transport and the environment. However, rather than looking at the Cheshire & Warrington sub-region in isolation, it considers interactions with neighbouring areas, common interests and challenges, and puts the sub-region's performance in a regional and national context.

Cheshire and Warrington Sub-regional Employment Land and Sites Study (GVA Grimley, June 2009)

2.16 This was undertaken alongside the Employment Study (BE Group 2009). It was commissioned by the former Cheshire and Warrington Economic Alliance, prior to local government reorganisation. The objectives were to assess and identify sub-regionally significant employment land and sites in Cheshire and Warrington, that can make a significant contribution to the growth of the sub-regional economy. It identifies the following sites as having the potential to drive the sub-regions priorities in the future;

- Capenhurst, Chester - potential for a cluster of scientific research, potentially based around nuclear sectors.
- Cheshire Oaks, Ellesmere Port remaining plots - potential to attract high value service sector employment, supported by mixed use opportunities.
- Lostock Triangle, Northwich - has the potential for high quality offices/laboratories linked to research and development, with ancillary light industry. There is the opportunity to bring forward a flexible range of quality commercial floorspace which responds to anticipated growth sectors.
- Pioneer Park, Ellesmere Port - the site benefits from strong transport connections and market activity has already led to a number of developments coming forward.
- South Bostock Road, Winsford - The site has strong locational assets, including transport connections and a positive environmental setting. It complements the adjacent Winsford Industrial Park, with the potential to target higher value sectors for both office and flexible industrial workspace, to attract higher value manufacturing.

2.17 The recommendations also identify additional sites, either as a result of their market appeal or scope to deliver regeneration, that could represent longer term priorities. The study also notes the need to consider how vacancy rates impact on the need for additional floorspace in the future, dependant on the location and suitability of such vacant units.

3 Policy Context

National Planning Policy Framework (NPPF)

3.1 The National Planning Policy Framework came into force in March 2012, setting out the Government's planning policies for sustainable economic growth and the framework within which Local Plan policies should be prepared. It identifies the planning system can contribute to building a strong, competitive economy, by ensuring that sufficient land of the right type is available in the right places to support future growth and innovation.

3.2 The NPPF does not change the statutory status of the development plan as the starting point for decision making on planning applications. Central to the NPPF is the 'presumption in favour of sustainable development' in both plan making and decision taking. For plan making this involves finding opportunities to meet the identified development needs of the area, based on a robust evidence base. Neighbourhood Plans, progressed by local communities, will need to support the strategic development needs identified for the Borough in the Local Plan.

3.3 The Core Planning Principles state that Local Planning Authorities should drive and support sustainable economic development. Local Plans should proactively meet the development needs of businesses, recognising and seeking to address any potential barriers to future investment. They should support existing business sectors, taking account of whether they are expanding or contracting and where possible, identify and plan for new or emerging sectors likely to locate in the area. At the same time, planning policies should remain flexible to allow for changes in future economic circumstances and to accommodate needs that have not previously been anticipated in the Plan.

3.4 The NPPF identifies that planning policies should be regularly reviewed. The long term protection of allocated employment sites should be avoided, where there is no reasonable prospect of the site being used for that purpose.

3.5 In developing planning policies, the Local Planning Authority is required to have a clear understanding of business needs and economic markets operating in the Borough. Local Plans are required to set out the strategic priorities for the area. Public bodies have a 'duty to co-operate' under the NPPF on planning issues that cross administrative boundaries, specifically in relation to the number of homes and jobs needed in an area. This involves working together with neighbouring authorities and Local Enterprise Partnerships to understand the changing economic needs, and to identify and address any potential barriers to investment. The assessment should include a quantitative and qualitative need for land or floorspace for economic development over the plan period. It should also assess the existing and future supply of land available for economic development, and its sufficiency and suitability to meet identified needs.

Other Planning Reform proposals

3.6 The Government have announced further reforms to the planning system, following the introduction of the NPPF and the Localism Act 2011 in order to proactively support economic growth. The key reforms relevant to the consideration of future employment land requirements are:

Office to residential

3.7 In April 2011 the Government consulted on proposals to grant permitted development rights for the change use of buildings from commercial to residential use. In January 2013 the Government announced it's intention to introduce new permitted development rights to allow for the change of use from B1(a) office to C3 residential. These rights came into force 30th May 2013 and run for a period of 3 years. Towards the end of this period the further extension of these rights will be considered for a further period.

Redundant agricultural buildings

3.8 In order to help job creation and rural prosperity, agricultural buildings less than 500m² will be allowed to be converted to alternative uses, but excluding residential. This came into force 30th May 2013.

Flexibility for business use

3.9 To enhance flexibility in the planning system, which can be vital when a quick response is necessary to support business growth, the thresholds for permitted development rights for change of use between business/office (B1) and warehouse (B8) classes and from general industry (B2) to B1 and B8 will be increased from 235 m² to 500 m².

Getting empty town centre buildings back into use

3.10 To create opportunities for new and start-up businesses and help retain the viability and vitality of our town centres, a range of buildings will be allowed to convert temporarily to a set of alternative uses including shops (A1), financial and professional services (A2), restaurants and cafes (A3) and offices (B1) for up to two years.

Cheshire and Warrington Local Enterprise Partnership Business Plan: Building on Success, Accelerating Economic Growth in Cheshire and Warrington (2013-2015)

3.11 The Local Enterprise Partnership was established on 11th March 2011 to drive the economic growth of Cheshire and Warrington. It is private sector led partnership and has the responsibility for speaking on and behalf of businesses in the sub-region. It covers the unitary authority areas of Cheshire West and Chester, Cheshire East and Warrington Borough Council. The Local Economic Assessment for Cheshire and Warrington (October 2010) has informed the Business Plan and the strategic themes, priorities and activities that have been identified.

3.12 The Business Plan sets out the vision for Cheshire and Warrington to be the best performing sub-regional economy outside the Greater South East. Strategic themes of the Plan are; business growth, transformation and innovation, skilled and productive workforce, infrastructure and connectivity and to promote Cheshire and Warrington. These themes are underpinned by a series of priorities and actions. The following Actions are most relevant to the consideration of employment land supply and emerging planning policies in the Borough;

- Business Growth: Action 1.1 - Developing Cheshire and Warrington's offer as the best place to do business by creating a premier location for inward and indigenous investors based on suitable and available sites and premises. Action 1.3 - Support the growth and well being of our top 20 Businesses, including identification of any issues most critical to their ongoing growth and investment.
- Transformation and Innovation: Action 2.1 - Deliver Cheshire and Warrington projects within the Atlantic Gateway Business Plan
- Infrastructure and Connectivity: Action 4.1 - Provide an excellent location to do new business; Provide a range of market ready employment sites that meet the needs of indigenous businesses and inward investors. Explore funding opportunities to unlock barriers to developing sites. Identify any market gaps and develop mechanisms to address these.

3.13 The LEP has been provisionally awarded an allocation from the national Growing Places Fund. The objectives of the fund are to: (i) generate economic activity in the short term by addressing immediate infrastructure constraints and promote the delivery of jobs and housing (ii) to allow the LEP to prioritise the infrastructure needed to deliver economic strategies and (iii) to establish sustainable revolving funds that can be re-invested to unlock further development potential. Council regeneration teams will be invited to submit key projects that may be eligible to access the fund.

Altogether Better for Business: An Economic Growth Strategy for West Cheshire (2013-2018)

3.14 The Strategy brings together a wide range of public, private and voluntary sector stakeholders and partnerships to work together in a co-ordinated way to prioritise interventions and investment to deliver sustainable economic growth.

3.15 The approach is underpinned by the public sectors role as a facilitator and enabler for businesses. The Vision states;

- *West Cheshire is an ambitious location which is seeking to grow business opportunities, create a varied and thriving economy and support it's communities. We wish to ensure that the area remains a great place to live, work and invest and Altogether Better for Business will ensure we are at the centre of the work programmes carried out.*

3.16 In West Cheshire the LEP's ambitions will be supported through a package of targeted activity, which over the next 5 years will create 5000 new jobs and £500m of private sector investment. The strategy recognises that ultimately these targets will be delivered by the private sector, through investment decisions made by existing and new businesses. Despite this the Strategy sets out the commitment of the public sector to maximise growth opportunities by creating suitable conditions to facilitate business investment and growth.

3.17 Action 2.1 of the strategy specifically relates to 'sites and premises for business investment'. Work will be undertaken to accelerate growth on major sites for development alongside progressing the Local Plan. Chester Business Quarter is recognised as a major strategic employment site with the potential to support economic growth across the sub-region.

3.18 The Strategy notes the role of various organisations and partnerships and brings them together to ensure a coherent approach across West Cheshire. At a sub-regional level, the strategy supports the LEP in the delivery of its Business Plan and the Mersey Dee Alliance. It recognises that wider strategic economic issues such as local aspects of the Atlantic Gateway Strategy including the Advanced Manufacturing and Industrial Innovation Corridor, sustainable transport schemes and skills/sector plans will need to be addressed on an issue by issue basis. The strategy also supports the delivery of local schemes and aspirations as identified in the Council's Regeneration Strategies (see below).

Cheshire West and Chester Regeneration Strategies

Chester Renaissance

3.19 The Chester One City Plan is a 15 year framework from 2012 to 2027. Delivery phases are broken down into phase 1 (0-3 years), Phase 2 (4-6 years) and Phase 3 (7-15 years). The vision of the plan is to raise the national and international profile of the city, to compete more effectively with similar historic cities as a desirable and distinctive place to live, invest in, do business, visit and study. One of the strategic objectives central to achieving this vision is "creating a regional economic driver - supporting local creativity, learning and entrepreneurs, encouraging inward investment and stimulating business growth".

3.20 The One City Plan identifies a number of development opportunity areas across the city. The Business Quarter offers the potential for major mixed use scheme, that will bring employment and activity through small, medium and large enterprises into the city. It comprises Chester Central, with the opportunity for 500,000sq ft high quality office space to improve Chester's commercial offer. Further commercial development opportunities are identified at the City Centre North Gateway. The Chester Central Development Framework (August 2010) has also been prepared to inform future development in the area.

Ellesmere Port Vision and Strategic Regeneration Framework

3.21 The Vision and Strategic Regeneration Framework (SRF) aims to stimulate, focus and support activities and developments in Ellesmere Port over the next 10-15 years which can advance ambitions for the economic development and physical improvement of the town centre and surrounding areas. Key objectives of the SRF are; (i) to attract new investment, (ii) to harness employment opportunities particularly in growth sectors, (iii) to ensure benefits are maximised for existing residents and businesses, (iv) to enhance the quality of key gateways, corridors, open space and under-used land and (v) to enhance the education and skills of local residents.

3.22 The Strategy has seven themes which includes 'delivering employment growth', recognising the significant employment land assets that are available in the area. The approach seeks to offer opportunities for the expansion of existing occupiers and attract new inward investment in the target sectors of automotive, environmental technologies, chemicals, retail/leisure and port/logistics related uses.

3.23 An Implementation Plan has been prepared to support the delivery of the SRF and prioritise areas for intervention. This recognises the existing stock of employment locations in the area with their potential to be enhanced. It also identifies the specialist sectors present. The Ellesmere Port Development Board will continue to work with these partners to raise the profile of Ellesmere Port's strengths within these industries and to attract new investment. The following areas are identified as having a significant contribution to future employment development:

- Eastern Employment Zone (New Bridge Road) is included as a significant development opportunity for industrial and leisure uses. An Area Development Framework for the area has been prepared.
- Eastern Employment Zone (Stanlow) is a large petrochemical area to the east of Ellesmere Port, owned by the Essar group. The area will continue to accommodate new energy related occupiers.
- Eastern Employment Zone (Ince Park) lies to the east of Stanlow. It is a greenfield site with planning permission for an Energy from Waste facility and a Resource Recovery Park with space for businesses in the waste and environmental sectors.
- The Waterfront Hinterland includes Hooton Park (GM Vauxhall) and the Bridgewater paper mill site. A case was made for an Enterprise Zone to be located in this area, however this was unsuccessful. Many of the development opportunities in this location remain within the control of the planning authority.

Weaver Valley

3.24 Northwich Riverside sets out the strategy for the retail led mixed use regeneration of the town centre. This is coupled with the wider regeneration of the town including new major housing growth opportunities through two new urban villages at Winnington and Wincham. Ten areas are identified in the town centre for redevelopment, 5 of which have the potential for refurbished or new office space. The aim is to strengthen the current economic base of the town centre through partnership working.

3.25 Winsford is benefiting from a number of major regeneration projects including a new Winsford Lifestyle Centre and Academy School. A Neighbourhood Plan is progressing alongside the Local Plan which will facilitate and shape future growth in Winsford, focusing on housing, employment, leisure and very importantly town centre regeneration opportunities.

Rural Strategy

3.26 The Rural Regeneration Strategy provides a framework over the next 10 years, influencing the way that the Council invests and supports its rural area, and the businesses, people and places within it. The Strategy has an economic focus and aims to create suitable conditions for enterprises to thrive. It suggests that the rural area has been making a disproportionate contribution to Cheshire West and Chester's economic growth over recent years. It seeks a growth of 7% in the number of jobs available in the rural area, equating to 3,800 jobs being created in the rural area over the next 20 years. It also aspires to growth in economic output by 50%, making it necessary to significantly increase the value of economic output created by each job. This can be achieved in part by attracting new businesses which operate in higher value sectors and markets but will also require existing companies (of low, medium and high output values) to increase their productivity by adding value to their output and

exchanging lower value for higher value activity. The strategy highlights the importance of a positive planning framework required to enable this growth.

Local Plans in Cheshire West and Chester

3.27 The adopted Local Plans for the Borough are; Chester District Local Plan (2006), Ellesmere Port and Neston Borough Local Plan (adopted 2002) and the Vale Royal Borough first review Alteration (2006). These set out current adopted policies and allocations for employment land, regeneration and rural diversification across West Cheshire. The Employment Land Study update will provide robust evidence to review these policies and allocations, ensuring that the policies and allocations in the new Cheshire West and Chester Local Plan will be based on a robust evidence base and support economic growth.

4 Neighbouring Area Analysis

Introduction

4.1 This section considers the property market in the local authority areas adjacent to CWAC. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on CWAC's land and property market. However, in reality many of the impacts are limited, as companies tend to prefer to remain in their localities due to the desire to retain staff. Of more interest is whether an undersupply of land in one area can be balanced by an oversupply in another. This is particularly important in Chester, which has limited land and a tight boundary to the west, abutting Flintshire.

4.2 CWAC is surrounded by a number of local authority areas. To the north are Wirral, Halton and Warrington. To the east is Cheshire East; to the west the Welsh Council areas of Flintshire and Wrexham; and to the south, Shropshire.

4.3 Figures for total supply are taken from Valuation Office data; while local authority annual monitoring reports and a number of relevant background documents are also used as appropriate.

4.4 Table 4.1 is taken from the Office for National Statistics Commercial and Industrial Floorspace 2008, which is the latest available data. It shows that CWAC dominates the supply of floorspace in the sub-region along with Cheshire East and Warrington. This is even more acute when looking at the office market in isolation, especially compared to Flintshire, for example. The rural nature of North Shropshire (and its size) explains the very limited supply of property to the south of CWAC.

Table 4.1 Property and Floorspace Distribution

Area	Floorspace (Number of Units)		Total Floorspace (Number of Units)
	Factories / Warehouses	Offices	
Cheshire West and Chester	2,922,000 (2,431)	597,000 (2,208)	3,519,000 (4,639)
Cheshire East	3,177,000 (3,195)	587,000 (2,824)	3,764,000 (6,019)
Flintshire	2,045,000 (1,844)	156,000 (724)	2,201,000 (2,568)
Wrexham	1,577,000 (1,462)	119,000 (526)	1,696,000 (1,988)
Halton	1,592,000 (1,124)	263,000 (591)	1,855,000 (1,715)
Wirral	1,499,000 (1,866)	283,000 (1,066)	1,782,000 (2,932)
North Shropshire	467,000 (765)	31,000 (235)	498,000 (1,000)
Warrington	1,925,000 (1,777)	494,000 (1,466)	2,419,000 (3,243)

Flintshire

4.5 Flintshire County Council completed its Employment Land Review in February 2009. This found there to be a substantial supply (and potentially oversupply) of employment land, but with issues relating to its readiness for development and its quality. In 2009 there was 318.26 ha of employment land in the County. There is recognition of close links to Chester - in terms of both flow of workers into the city and accommodating some of the city's businesses in Flintshire.

4.6 The majority of land and premises available is to the east of the County, close to CWAC's border. The study found there to be 113.5 ha for general industry / distribution purposes in Deeside, this includes Pochin / Rosemound's Northern Gateway / Garden City scheme; as well as 14.5 ha suitable for offices in Sealand / Saltney. There is a potential 28 ha to continue the high quality industrial estate development around Hawarden (linked to Airbus); some 20 ha of high quality business park / industrial estate land in the Connah's Quay / Queensferry / Shotton area; as well as the emerging Warren Hall development at Broughton, where a high quality office scheme is proposed on 28.7 ha.

4.7 Matching supply to demand, the analysis found that Flintshire requires a forward supply of 15 ha per year. To cover the period 2009-2021 and adding a 25 percent buffer, the County needs 243.75 ha. From the headline supply of 318.26 ha, some 45.25 ha is recommended for de-allocation. Therefore the remaining 273.01 suggests there is an oversupply of 29.26 ha. These figures have been reviewed in the Flintshire Unitary Development Plan, which was adopted in September 2011. It identifies a need for approximately 300 ha to provide for a range of scenarios. 341ha have been allocated for employment use, 32 ha of which is restricted, for example being for expansion land for specific businesses. Therefore, 309 ha of allocated land is considered to be generally available.

4.8 Policy STR3 Employment in the adopted Unitary Development Plan states that "the Plan will facilitate a diverse and sustainable economy through:

- The provision of 300 ha of employment land over the Plan period;
- The provision of a range of type and size of employment sites;
- Enabling new employment generating development mainly within or adjoining existing settlements, in principal employment areas, development zones, on allocated sites and suitable brownfield sites and through the sensitive conversion of rural buildings and other appropriate rural diversification initiatives;
- Existing employment sites and buildings being retained, where necessary and practicable, for that use; and
- Appropriate expansion of existing firms and businesses.

4.9 Within the Unitary Development Plan, the following allocations for B1/B2/B8 uses are close to the border with CWAC:

- 15.5 ha Chester Aerospace Park, Broughton (site now partly taken up)
- 18.2 ha Manor Lane, Hawarden Park extension (all still available)
- 1.3 ha Chester West Employment Park (all now taken up)

- 2.2 ha River Lane, Saltney (eastern part now developed, western part still available)
- 14.6 ha Land East of Saltney Ferry Road, Saltney (all still available)

4.10 The following sites safeguarded as high quality employment sites for B1 use are also close to the border with CWAC:

- 36.5 ha Warren Hall, Broughton (all still available)
- 18.5 ha DARA site, Sealand (all still available)

4.11 From a total of 26 allocations, 8 are near the Borough's boundary. 5 of these sites are still available. There is also an allocation for mixed use development at the Northern Gateway / Garden City and an outline application for an employment led mixed use proposal is currently under consideration.

4.12 Deeside Enterprise Zone has been designated and covers Deeside Industrial Park, Garden City, Sandycroft and Hawarden Airport.

Wrexham

4.13 Wrexham County Borough Council completed the Employment Sites Study in August 2007. The assessment indicated that there was 114 ha of allocated employment land, with a further 96 ha of potential land suitable for allocation. Most of the available land is at Wrexham Industrial Estate. There is also a relatively good supply of readily available land in the County - some 68 ha (11 sites). Given the relatively low level of demand, this suggests a significant oversupply of land in the County. Even accounting for constraints on some of the sites, this oversupply remains.

4.14 The two key employment areas in the County are Wrexham Industrial Estate and Llay Industrial Estate, just to the north of Wrexham. Wrexham is only 20 km from Chester and 25 km from Malpas and as such will have some influence, but it will not be considerable. There is 65 ha of allocated land at Wrexham Industrial Estate and 17.5 ha at Llay Industrial Estate. The quality of this land resource is limited, but it satisfies the nature of local demand. The higher quality Wrexham Technology Park is also establishing itself and there is 15 ha of expansion land there as well.

4.15 The new Local Development Plan for Wrexham was submitted in September 2011, but due to fundamental concerns raised by the Inspector, the hearing was suspended and the Local Development Plan withdrawn on 16 March 2012. Some of the issues raised by the Inspector related to employment, for example:

- The Plan's approach to growth in the employment and retailing sectors does not reflect the Wales Spatial Plan's desire to see the strengthening of Wrexham as a key hub.
- The allocation of employment land has not sought to meet the likely future demand from the high technology sector which has been identified as having the greatest potential to grow.

- The envisaged scale of growth in the employment sector may be hampered by the limited pool of suitably skilled workforce that would be likely to result from the Plan's more restrictive approach to housing growth.
- The proposed imbalance between the scale of employment and housing growth may lead to employees commuting into the County to work, thus limiting the economic benefits to the area and increasing car borne journeys.

Cheshire East

4.16 A consultation on "A Development Strategy for jobs and sustainable communities" was undertaken Jan-Feb 2013 to inform the final submission draft of the Local Plan. It supports the generation of 20,000 new jobs focused around the M6 corridor and town centres. Significant new employment areas are proposed to underpin the strategy at Basford, Crewe, Radway Green J16 near Alsager, J17 at Sandbach, Middlewich, North Congleton, South Macclesfield and Worden.

4.17 The Cheshire East Employment Land review was published 7th November 2012 (Ove Arup & Partners) to provide robust evidence for the Cheshire East Local Plan. The study assesses whether existing employment sites are likely to continue in employment use to 2030, or whether there could be a full or partial loss to non employment uses over the same period.

4.18 The study involves the use of historic take up rates, the Cheshire, Halton and Warrington Econometric Model (CHWEM) and employment land losses to predict likely demand for employment land 2009 to 2030. This results in an employment land demand in the range of 178.35ha-284.30ha. The Study recommends taking the middle of the range as being appropriate to meet demand. This results in 213.68ha-249.01ha to meet demand. A flexibility factor is then applied which increases the overall employment land requirement range to 277.78ha-323.71ha for their Local Plan period 2009-2030 (average annual rate of 13.23ha-15.41ha). The existing employment land supply is a total of 272.38ha. Based on this analysis Cheshire East could have an employment land shortfall of between 5.40ha and 51.33ha.

4.19 Crewe and Nantwich are roughly equidistant from Winsford, Tarporley and Malpas - all approximately 25 km away. Given the distance between Crewe and the nearest key settlements in Cheshire West, there is little overt competition between the locations - especially as the intervening area is rural in nature.

4.20 Middlewich has a significant local impact. Midpoint 18 is the key industrial estate in the town and adjacent to the administrative boundary with Cheshire West and Chester. As it is midway between Winsford and the M6 it tends to be the preferred location for footloose investment, especially distribution warehousing. Midpoint 18 phase 3 provides in the region of 57ha employment land. A Middlewich Town Strategy has also been prepared by representatives of the local community working closely with Cheshire East Council. This identifies the potential for additional employment land on the edge of Middlewich adjacent to Midpoint 18 which could contribute towards future demand. Part of this land lies within the administrative boundary of Cheshire West and Chester and will require further assessment through the Council's Local Plan process.

Halton

4.21 The Joint Employment Land Review (ELR) for Halton, Knowsley, Sefton and West Lancashire was finalised in January 2010. The ELR identifies that Halton has 210.02 ha of employment land, comprised of 62 sites - the most of any of the four local authority areas assessed in the Joint ELR. However, of this, limited land is actually available - marketed or not; while 34 ha is at risk of being lost from the land resource. The realistic land supply figure is just under 179 ha.

4.22 In general, Widnes lacks office sites; whereas Runcorn, which has the greatest influence over CWAC, lacks industrial sites. Runcorn is just across the border from Frodsham and Helsby, and only 25 km from Ellesmere Port and 20 km from Northwich. Even within Halton, the markets between Widnes and Runcorn are relatively separate, so the impact from Widnes on CWAC is also likely to be minimal.

4.23 The Halton Core Strategy Local Plan is currently at Examination stage and there has been consultation on the post-submission changes. The current version of the Halton Local Plan suggests that 313 ha of employment land is required up to 2028. There are 163 ha of sites with outstanding employment allocations and 28 ha of sites with planning permission for employment uses and 18 ha of land allocated for employment at East Runcorn. This leaves an undersupply of 104 ha, 14ha of which is to be provided at West Runcorn and 130ha by remodelling and regeneration of sites within existing employment areas. A full review of the deliverability and suitability of the remaining Halton UDP employment allocations and the identified regeneration and remodelling opportunities will be undertaken as part of the first Site Allocations and Development Management Local Plan and will be kept under review thereafter.

4.24 Key schemes in Runcorn include Daresbury Park and Daresbury Science and Innovation Campus. Both are high quality office schemes on the eastern side of Runcorn. The Local Plan identifies that Daresbury strategic site would provide 26 ha for expansion of B1 uses and 40 ha for new B1 developments. The remaining supply at 2011 for Daresbury Park is 37.35 ha. Daresbury Science and Innovation Campus has also been identified as an Enterprise Zone and new businesses in this zone will benefit from a 100% discount on business rates. At 2011, 11 ha were remaining at the Science and Innovation Campus. The Daresbury sites tend to be more closely linked and associated with the Warrington property market, and hence their impact on CWAC is expected to be limited. Although given the very large catchments associated with science parks, the presence of Daresbury Science and Innovation Campus probably rules out the feasibility of a similar scheme in CWAC for the immediate future.

4.25 Other significant schemes include Manor Park, 9.81 ha remains on this modern industrial estate and 4.53 ha at The Heath, a small business and science related development.

4.26 Key regeneration schemes in Halton include Widnes Waterfront, at which there is 19.94 ha of employment land remaining as at 2011; Mersey Gateway Bridge, a second crossing of the River Mersey, which is expected to start on site in 2013; and 3MG, the Mersey Multi Modal Gateway, which had 81.42 ha of land remaining at 2011 (for B8 development).

Wirral

4.27 The Wirral Employment Land Study was completed in August 2009 and a refresh of the study was completed in 2012. The refresh identifies that Wirral has 264.39 of undeveloped, allocated employment land, made up of 116 sites. However, 75% of this is only available in the longer term (5 years or more), so there is a shortage of immediately available, developable land. There is also an issue that over a third of the current potential supply is being considered for alternative uses, or is severely constrained.

4.28 Most of the available employment land is along the eastern side of the peninsula, there is very little to the west, which is more rural / residential in nature.

4.29 The submission draft Core Strategy supports a number of key sectors including research and development; advanced technology and manufacturing; life sciences and biomedical facilities.

4.30 Key influences on CWAC's land and property market include Wirral International Business Park (WIBP) at Bromborough. This was designated as a strategic regional site by the now defunct NWDA, and has been subject to an intensive programme of land reclamation. It is the Borough's premier business park and provides a good range of modern industrial and warehousing buildings. The Core Strategy submission draft identifies that it should be safeguarded for future business use. However, there is a need to provide a successor location in the medium to long term and Birkenhead and the Wirral Waters area may fulfil that role.

4.31 There is 4.27 ha at Clatterbridge Hospital, which is available for a medi-park scheme or other potential hospital-related uses, close to junction 5 of the M53.

4.32 Eastham Dock Estate is just over the border from Ellesmere Port. It provides port-related bulk processing and storage facilities, linked to the Manchester Ship Canal. There is over 20ha here, but approximately 6 ha has planning permission for a waste recovery plant, which has not yet been constructed. Peel Holdings are reserving this land for the development of the port, including the relocation of port activities from Ellesmere Port waterfront.

4.33 The rest of the key sites and employment areas are to the north of the Borough and have little impact on CWAC.

Shropshire

4.34 The Shropshire Employment Land Review was completed in 2011. It identified that Shrewsbury is the economic centre, but that there are also a range of opportunities in other market towns including Whitchurch and Market Drayton.

4.35 There is a good portfolio of employment land and premises with a reasonably active property market, but which is currently stalled by the recession. The industrial market is significantly larger than the office market.

4.36 There is limited industrial land, freehold properties and modern premises in Whitchurch.

4.37 Shropshire Council have recently serviced new employment land in Market Drayton and are attempting the same in Whitchurch.

4.38 The study states that most neighbouring authorities have little impact on Shropshire's land and property market.

4.39 Policy CS14 of the adopted Core Strategy identifies a target of 290 ha of employment land. The realistic supply is 135.28 ha, but a reserve supply is also available. Following the Core Strategy guidance there is a need to identify another 118.84 ha of new employment land over the period to 2026. 15 ha of this is to be provided in Whitchurch, 15.5 ha in Market Drayton and 4.0 ha in Wem. However, public sector support will be required to bring forward existing sites in Whitchurch due to power supply issues and the employment study states that this needs to be addressed immediately as the town lacks readily available employment land.

4.40 Whitchurch is the only location that has any real impact on CWAC's property market. It is only just over the border, 9 km from Malpas - and even then the impact is only slight. There is limited impact on other centres such as Chester and Tarporley, as they are 35 km and 25 km away respectively. Key employment sites in Whitchurch include Whitchurch Business Park, Waymills Industrial Estate and Civic Business Park. There are current allocations of approximately 14 ha in Whitchurch, mainly at Waymills Industrial Estate.

Warrington

4.41 The borough shares only a small length of border with Warrington - close to the villages of Whitley, Higher Whitley and Antrobus to the north of Northwich. The one large employment area close to Cheshire West and Chester is Barleycastle Trading Estate, near Appleton Thorn, which is a moderate quality, distribution warehouse-related scheme.

4.42 However, Warrington is a key economic centre in the North West, on a par with Chester. It benefits from its excellent motorway links - M56, M6 and M62 - and location between Manchester and Liverpool. Consequently it is a key location for the logistics sector and for regional headquarter offices. But most of Warrington's key employment areas are to the north and east of the town, on the far side from the study area. This includes very successful industrial estates and business parks such as The Grange, Birchwood Science Park, Risley, Winwick Quay, Centre Park and Gemini.

4.43 One of the most strategic sites in the North West is Omega, which is accessed from Junction 8 of the M62. The development is planned as five phases. The first phases have outline planning permission - with phases one and two to provide 149,000 sqm of B8 space, and 139,000 sqm of B1 accommodation. These phases have a 15 year development programme and will create approximately 8,000 jobs. Work has not yet started on site, but is anticipated to begin relatively soon, as a reserved matters application has now been submitted for part of the site.

4.44 The Warrington Local Plan Core Strategy was submitted to the Secretary for State on 19 September 2012. It sets a requirement of 277 ha of employment land to be provided and identifies Lingley Mere and Omega phase 1 & 2 as strategic locations for employment development. The Omega strategic site will be dealt with separately, an additional 130.19ha. The Waterfront and Arley Meadows is identified as a strategic opportunity and guidance on appropriate uses is to be provided through a Land Allocations Local Plan or a Supplementary Planning Document. Port Warrington is also identified as a strategic opportunity and is a developed site with the potential to become a multi-modal port facility.

4.45 The Employment Land Availability Position Statement sets out the position as at 1 April 2012. It states that the Core Strategy requirement is based on a past take up rate of 11 ha per year plus a 20% flexibility factor. This provides the 277 ha requirement figure from 2006-2027. There have been completions of approximately 60 ha and 4 ha are under construction and 142 ha have planning permission. This leaves approximately 72 ha remaining requirement, but the 130 ha at Omega results in an oversupply of 58 ha post 2027.

Summary

4.46 There is plenty of employment land in both Flintshire and Wrexham, as both have an oversupply against forecast needs. However, this could change if Wrexham's growth ambitions are reviewed after the Inspector's comments on the Local Development Plan. There are also some issues around quality of land, although to remedy this regeneration and new schemes are proposed.

4.47 Cheshire East offers some competition, particularly in terms of Middlewich's effect on constraining the market in Winsford. But the impact of Crewe and Nantwich is negligible, as are opportunities to the east of the M6.

4.48 Runcorn provides the premier science park opportunity; as well as a multi-modal gateway. This probably limits the scope for CWAC to compete directly in these markets. Daresbury Park also satisfies the need for top quality office development along the M56 corridor.

4.49 Wirral International Business Park is quite close to Ellesmere Port geographically. Wirral is similar to Ellesmere Port in terms of the amount and type of land available. Eastham Dock is facilitating the regeneration of Ellesmere Port Waterfront.

4.50 Shropshire might have some cross-boundary influences with Malpas, particularly in relation to Whitchurch, but they are relatively minor.

4.51 Warrington, to a degree, overshadows the study area, particularly for footloose investment in the logistics and regional headquarter offices. However direct competition at the local level is relatively limited.

5 Property Market Trends

Property Market Review

Property Market-General

5.1 This study covers the period to 2030 and so it is vital that the supply and demand for property is understood in this context, as this will affect future demand for employment land. This chapter examines enquiry data to understand the current nature of these land and property requirements for employment use.

Public Sector Property Enquiry Analysis

5.2 The Evolutive System is an in-house database which charts enquiries and demand for property and land by category. An analysis of enquiries for the last three years (2009-2011) is shown, although this is also compared to the 2006-2008 data that was used for the previous Employment Land Update (2009). The analysis also covers enquiries received by the Local Authorities of Chester, Ellesmere Port and Neston and Vale Royal, as well as Cheshire County Council.

5.3 For the study area as a whole, enquiries have been changeable over the last three years. It is also important to note that at this lower-level geography, enquiries may be replicated across a number of preferred locations.

Industrial

5.4 Although the number are slightly inflated due to double-counting because of multi-location enquiries, overall enquiry levels for industrial premises has fluctuated over the last three years, but is spread broadly evenly across the Borough. The general trend has been one of fluctuation, with interest remaining high in the Chester area, but across the rest of the Borough with interest too.

Table 5.1 Destination of Industrial Enquiries

Destination	2009	2010	2011	Percentage
Chester centre & outskirts	133	214	131	18.3%
Chester Business Park	64	107	66	9.1%
Sealand Road	68	107	66	9.2%
Chester Rural	68	107	70	9.4%
Ellesmere Port	77	106	70	9.7%
Neston	74	105	64	9.3%
Frodsham & Helsby	79	97	55	8.8%
Tarporley	77	97	47	8.5%

Destination	2009	2010	2011	Percentage
Northwich	78	98	59	9.0%
Winsford	78	98	52	8.7%
Total	796	1136	680	2612

5.5 In terms of the size of properties in demand, the vast majority of enquiries are for units under 5000 sq ft, with 40.5% of enquiries for units under 1000 sq ft.

Table 5.2 Size of Industrial Enquiries

Size Sq ft	2009	2010	2011	Percentage
0-1000	25	104	58	40.5%
1001-2500	33	28	12	15.8%
2501-5000	36	16	23	16.2%
5001-10,000	14	11	8	7.1%
10,001-20,000	19	17	7	9.3%
20,001-50,000	16	3	4	5.0%
50,001-100,000	3	12	3	3.9%
100,001-200,000	3	0	0	0.6%
200,001+	2	2	3	1.5%
Total	151	193	118	462

Office

5.6 Chester is the key driver for office market interest in the Borough, with all other areas receiving equally lower levels of interest. Again, the size of office units is key, with smaller units under 250 sq ft the most sought after, and units under 5000 sq ft forming the vast majority of enquiries.

Table 5.3 Destination of Office Enquiries

Destination	2009	2010	2011	Percentage
Chester centre & outskirts	109	121	110	21.6%
Chester Business Park	56	60	54	10.8%
Sealand Road	52	60	51	10.4%
Chester Rural	53	63	55	10.9%

Destination	2009	2010	2011	Percentage
Ellesmere Port	39	36	39	7.2%
Neston	36	33	33	6.5%
Frodsham & Helsby	55	40	37	8.4%
Tarporley	55	42	26	7.8%
Northwich	56	36	40	8.4%
Winsford	55	37	35	8.1%
Total	566	528	480	1574

Table 5.4 Size of Office Enquiries

Size Sq ft	2009	2010	2011	Percentage
0-250	19	22	25	23.5%
251-500	7	11	6	8.5%
501-1000	15	21	5	14.6%
1000-2500	25	13	10	17.1%
2501-5000	20	12	12	15.7%
5001-10,000	13	5	2	7.1%
10,001-50,000	13	8	5	9.3%
50,001-100,000	3	3	0	2.1%
100,001+	4	0	2	2.1%
Total	119	95	67	281

Land

5.7 Again, Chester is the key driver for enquiries, although Ellesmere Port and Neston have also attracted a substantial level of interest. Smaller parcels of land (under 1 acre) form the majority of interest of enquiries.

Table 5.5 Destination of Land Enquiries

Destination	2009	2010	2011	Percentage
Chester centre & outskirts	12	32	42	17.6%
Chester Business Park	6	16	21	8.8%

Destination	2009	2010	2011	Percentage
Sealand Road	6	16	21	8.8%
Chester Rural	6	16	21	8.8%
Ellesmere Port	9	19	23	10.4%
Neston	9	19	23	10.4%
Frodsham & Helsby	11	17	19	9.6%
Tarporley	11	17	16	9.0%
Northwich	8	17	16	8.4%
Winsford	8	17	16	8.4%
Total	86	186	218	490

Table 5.6 Size of Land Enquiries

Size Acres	2009	2010	2011	Percentage
0-0.5 acres	1	11	10	33.8%
0.51-1 acre	1	2	0	4.6%
1.1-2 acre	5	3	10	27.7%
2.1-5 acres	2	4	3	13.8%
5.1-10 acres	1	2	2	7.7%
10.1-20 acres	0	0	1	1.5%
20.1-50 acres	2	2	1	7.7%
50.1-100 acres	0	0	2	3.1%
Over 100 acres	0	0	0	0.0%
Total	12	24	29	65

Source of Enquiries

5.8 The source (location) of all enquiries has been charted for the last 3 years. In 2009, 93.5% of all enquiries were from the North West, in 2010 that number was 95.2%. In 2011 the proportion of the total enquiries that were from the North West dropped substantially (74.7%), and increased levels of interest from outside the immediate area were notable. A significant rise in the number of enquiries from Greater Manchester contributed to this, as well as interest from other parts of the UK.

Property Supply

5.9 A schedule of floorspace being marketed in the study area, through the Evolutive Database in May 2012, has been compiled to provide a broad indication of vacant units currently available across the Borough. This reflects the message from Agents through the consultation, that there is significant headroom in terms of employment floorspace, and that empty rates are actually pushing landlords to demolish empty properties to avoid substantial costs.

Industrial

5.10 Table 5.7 below indicates that there is currently 4,500,000 sq ft of industrial space available in Cheshire West and Chester. There is a range across the size bands, and large amounts of floorspace concentrated within Ellesmere Port and Winsford, together comprising nearly 75% of the available floorspace.

Table 5.7 Amount of marketed industrial floorspace sq m (sq ft), May 2012, Evolutive Database

Chester	Ellesmere Port	Northwich	Winsford	Neston	Frodsham & Helsby	Rural
54,200	145,077	35,444	172,010	1649	1796	8304
(583,412)	(1,561,602)	(381,526)	(1,851,505)	(17,756)	(19,334)	(89,401)

5.11 There is far more leasehold than freehold space available, and a wide range of quality. Compared to the previous Employment Land Review, headroom has increased significantly between 2009 and 2012 (the previous report identified 253,733 sq m / 2,731,166 sq ft of available space). This reflects the national picture of significant headroom and contracting companies, and contributes to the assertion from Agents that there will be little appetite for design and build of new employment space for at least the next 3-5 years. However, given more recent take up trends of industrial/warehousing units, particularly in Ellesmere Port, this picture may change in 2013.

Office

5.12 Table 5.8 below identifies that there is 2,360,772 sq ft of available office space across Cheshire West and Chester. The majority of this space is in Ellesmere Port (28%) and Chester (49%) and reflects information from Agents that available office floorspace in Chester has been over one million square feet for a significant period of time.

Table 5.8 Amount of marketed office floorspace sq m (sq ft), May 2012, Evolutive Database

Chester	Ellesmere Port	Northwich	Winsford	Neston	Frodsham & Helsby	Rural
107,516	61,077	25,468	4631	954	5110	14,565
(1,157,300)	(657,436)	(274,140)	(49,849)	(10,263)	(55,004)	(156,780)

5.13 Again, this is a very large increase since the last study, which identified 57,802 sq m or 622,177 sq ft of available office space across the Borough as a whole. This office space varies in terms of size and quality, although there are more smaller offices available (sub 5,000 square feet) than any other category. Again, there are far more leasehold properties available. Therefore there is likely to be enough headroom to absorb demand for a significant number of years.

Emerging Property Trends

5.14 Whilst previously a combination of low interest rates and the depressed stock market has led to an unusually large number of companies looking to own their premises through designing and building their properties, now a lack of finance, economic uncertainty and significant headroom in terms of supply has effectively restricted this market.

5.15 This will have an ongoing impact on demand for employment land of all sizes. Speculative development is also a side of the market that is now almost non-existent in some locations, and unlikely to resurrect for a significant number of years, due to a lack of end-users. However, in some areas and use types there may be some specific need such as for industrial units in the Ellesmere Port areas.

5.16 However, more positive news has been noted in the Cheshire West and Chester Annual Property Report 2013, which has identified significant growth in transactions, particularly in the Industrial but also office market. This activity has bucked the sub-regional and regional trend substantially, particularly in Ellesmere Port, and if this continues it may have implications for employment development activity.

Industrial

5.17 Demand for industrial space remained relatively constant in 2011, although at a much lower base than in previous years. However, 2012 saw a significant increase in the level of transactions, with floorspace take-up at 1.86m sq ft (173,000 square metres). In terms of the number transactions, these increased by 150% from 2011. Ellesmere Port continued to demonstrate its strengths in this sector, with half of all freehold purchases in the Borough occurring here.

5.18 More generally, those properties with good eave heights, flexibility, access for larger vehicles and proximity to transport networks as well as a potential source of employees, tend to attract the most interest. However, these transactions continue to be dominated by short leases, with periods of less than three years common. A lack of finance remains a significant constraint on this market more generally at present.

Office

5.19 Smaller office space continues to remain in most demand, due to the relative success of small to medium sized companies dealing with the downturn. Micro-businesses (those with less than ten employees) typically want serviced offices or similar types of easy-in, easy-out schemes that lower their risk exposure. Improving technology means specifications are changing, for example wireless networks will soon remove the need for raised floors and make the conversion of Victorian buildings etc easier. Car parking remains a significant demand for occupiers.

5.20 Given the uncertainty of the economy at present, tenants are looking for increasingly short leasehold properties with flexible terms. In many cases, new buildings are not commanding the higher rents that they once did, and are more in line with secondary space. This has again removed the appetite for new development, and increased the demand for serviced offices. Conversions in the rural area continue to attract a higher than average level of demand. As well as flexibility, occupiers are looking for clustering as a means of strengthening their businesses, and the need to be located close to complimentary services or suppliers has become increasingly important, both in lowering costs and creating 'strength in numbers' in terms of pooling of resources, intellect or marketing, for example.

The Future

5.21 The downturn has presented a significant challenge to the UK economy, and had widespread land and property impacts. Prior to 2007, the shift towards the 'knowledge economy' and higher skilled jobs was a key policy aim of central government. It anticipated the increase in service sector employment, creating an increase in demand for offices and higher density accommodation, whereas the increase in distribution would require locations with good strategic road and rail access. However, since the downturn and identified weaknesses in the UK economy, there have been increasing calls to broaden the UK skills base and return somewhat to the manufacturing sector which has previously supported so many UK jobs. The impacts of this are likely to be felt by the property market in the longer term.

Summary

5.22 Demand and supply analysis for the past three years indicates that there remains demand for smaller units across industrial and office sectors, but that overall there is significant headroom across the Borough which is likely to absorb demand for a number of years. This is particularly true of the office market in Chester. The only area where there appears to be scope for potential supply constraints is for modern premises catering for distributions-type industries, particularly in the Ellesmere Port area where demand has increased significantly. Due to current headroom rents have been suppressed to the point where new-build space is achieving no more rental value than second-hand stock, thus deterring the design and build market. However, it must be borne in mind that this situation of supply and demand is a relatively short-term situation in the context of the plan period and therefore a longer-term view must be taken in terms of land supply, in the context of economic recovery and reduced stock headroom. This is an important consideration in light of the recent more positive signs in the market.

5.23 Fluctuating levels of enquiries have been experienced across the Borough over the last 3 years, but they share a common trait of being for premises under 5000 sq foot, with 40.5% of enquiries for premises under 1000 sq ft. In Chester, the office market has attracted a significant number of enquiries for premises under 250 sq ft which potentially indicates either the downsizing of businesses or the rise in the creation of starter businesses. Nevertheless, it suggests that there may be a lack of supply in this type of offer. In terms of the source of enquiries, there has been a rise in the last three years of enquiries coming from outside of the Borough, particularly from Greater Manchester.

5.24 Overall, higher levels of floorspace are being marketed, reflecting the impact of the recession and the impact that empty rates has had for landlords. In Summer 2012 Cheshire West and Chester's database indicated that there was approximately 4.5 million square feet of industrial floorspace,

particularly focussed around Ellesmere Port and Winsford. There is also 2.3 million square feet of office space centred around Chester (49%) and Ellesmere Port (28%).

5.25 However, within Ellesmere Port there does appear to be demand for land, particularly that owned by the Local Authority. This is likely to be the result of wider uncertainty in the market, and the greater certainty and flexibility offered by Local Authority landlords. In addition, the 'policy on' position of actively attracting additional occupiers to the local market may have a positive impact on take-up, above and beyond economic projections.

5.26 As noted in Chapter 3, Government reforms of the planning system that came into force 30th May 2013 allow for changes of use from offices to residential. It also allows for flexibility for changes of use between B1, B2 and B8 uses and the conversion of agricultural buildings to alternative uses (excluding residential). The effect of these reforms are likely to have an impact on the availability of office and industrial space will need to be monitored over the next few years. An important factor in relation to this will be the suitability and location of buildings.

6 Business Needs

Property Market Analysis

Introduction

6.1 This section considers current property market conditions and their implications for employment land and property need and provision. These findings are derived from consultations with private sector stakeholders such as commercial property agents and developers. The analysis is broken down into industrial and offices, and is presented in the following table. This reflects the different spatial geographies covered by those consulted, in order to obtain specific as well as more generalised views of the way in which the property market operates across the Borough.

Office Market

Table 6.1 Commercial Office Agent and Developer Comments

Area Covered	Contact	Comment
Chester	Regional Agent	Demand is relatively low and funding is a huge issue. When property does sell it achieves a relatively good price due to scarcity of good quality stock. Chester/Chester Business Park has limited requirements for land. The level of vacancy and empty rates in Chester has had a huge impact on rental values and in many cases they have almost halved. There is too much office supply in Chester for there to be any real demand for further development land.
Rural Areas of Cheshire, Chester and Ellesmere Port	Regional Agent	Very mixed interest depending on location in the Borough. The Out Of Office market is quiet with significant headroom in terms of vacant stock.
Cheshire West	National Agent	Much of the second-hand office stock in the area is poor quality for offices 10,000 sq ft and above. In cases where freeholds are up for sale, often prices are below the cost of constructing the building. Cheshire West overall is experiencing good levels of demand compared to other areas in the region. Speculative build is all but gone, but may return in the next 2-5 years depending on when bank lending improves. Even then, it would be likely to come off the back of a larger pre-let.
Chester, Ellesmere Port, Northwich	National Agent	Conversions appear to be more popular at present, and it is felt that design and build will not return for a number of years, particularly due to the significant headroom. There have been some sporadic upsurges in interest but this is generally down to one or two businesses. Gadbrook Park is only at 60% capacity.
Cheshire	Local Agent	Empty rates have had a huge impact on investors, and buying new property is not something landlords are considering at the moment. Most are looking to get out of property because empty rates are a liability. Enquiry levels are low, although some interest remains in barn conversions etc. New buildings are commanding the same rents as old, and so there is little incentive to build any new stock.
Cheshire West	Local Agent	Rents have remained static over the last 12 months and are anticipated to remain so. Take up for office has been weak across the Borough, and it is likely that they cannot get much lower. However, Chester has fared better than other locations such as Northwich. Offices in Chester are achieving £14psf, with the Business Park still achieving

Area Covered	Contact	Comment
		rents of £17-£18psf. However, there is little appetite for this type of unit in Chester Business Park at present and other occupiers are considering letting go of further space. Ellesmere Port and Rural areas appear to have survived, although there will be no need at all to develop further space in the medium terms (5 years).
Chester	Local Developer	Land for office development has been untouched for 6 years.

6.2 In terms of the performance of particular office developments, it is considered that no office developments have been resilient in the current market, and occupiers are very much in control in terms of dictating terms and rents. This is even the case in traditionally strong office areas such as Chester Business Park.

Industrial Market

6.3 The following table sets out comments from Agents in relation to the industrial market:

Table 6.2 Commercial Industrial Agent and Developer Comments

Area Covered	Contact	Comment
Chester, Ellesmere Port, Winsford	Regional Agent	Chester itself has a small industrial base, and industrial land brought forward may perform relatively well due to the scarcity of this in the Chester area. Ellesmere Port acts as more of a attractive location for industrial use for Chester/Deeside. Winsford is more of a self-contained market with localised interest, and ability to attract some tenants from Cheshire East and Manchester. There are positive signs at Winsford Trading Estate, where there has been a sudden upsurge in interest and redevelopment of some buildings.
Rural areas of Cheshire, Chester and Ellesmere Port	Regional Agent	Empty rates have had a major effect on rental levels since April 2008. For example, landlords taking £4/psf previously are now having to pay £2/psf empty rates and will accept rents of £2.50/psf. However, the industrial market is considered to be better than the office market and there is a lack of prime industrial stock.
Chester, Ellesmere Port, Northwich	National Agent	Rentals levels have been maintained despite low levels of demand and high availability, However, empty rates are having a significant effect and some landlords are bulldozing space to avoid them. Newbridge Road in Ellesmere Port achieved the highest headline industrial rent for 2010-2011.
Chester and Cheshire	National Agent	There are some positive signs in the industrial market and it is anticipated that there will be little change in 2012-2013, with lots of churn and occupiers generally opting for second hand stock. Product and location are key drivers of demand, and only deals will sell. Motorways, parking, good sized yard, modern construction and good height for flexible use of space are key requirements.
Chester	Local Developer	There has been some limited demand for 'trade counter' type stock. Empty rates have killed all speculative development, especially 'sheds'. The only real activity is in relation to 1000 sq ft units of freehold space.
Chester, Ellesmere Port	National Developer	There has been little interest in Chester for small flexible industrial space, and rents have halved from around £10psf to £5psf, and occupancy levels remain at 60%.

Area Covered	Contact	Comment
		Interest in Ellesmere Port has been much more promising, although even this has struggled compared to neighbouring areas such as Deeside, which has benefited from EDZ designation.
Ellesmere Port, Chester, Winsford	Local Agent	Ellesmere Port has seen an improved level of activity over the last 6 months, particularly in terms of serviced units but also in terms of interest in expansion land from existing businesses. This is in contrast to Chester and Winsford which are not performing as strongly. This is thought to be a result of slightly poorer access and infrastructure issues, and the age of some of the units, particularly in Winsford.

6.4 In addition, a number of significant landowners in the area such as Stanlow Refinery and Ineos are looking to increase the efficiency of their land holdings in the coming years. They do not want to dispose of this land, but are looking to increase the income and usage of this land through leasing it to companies than may have linkages to these 'parent' companies, and improve supply chains or manufacturing processes.

Annual Property Report 2013

6.5 This report is prepared by Cheshire West and Chester and provides an overview of the Borough's property market performance.

6.6 The latest review concludes that Cheshire West and Chester has experienced significantly above-average growth in a number of sectors. This is contrary to the Cheshire and Warrington report, where transactions are at a similar level to 2011, and the North West picture that has deteriorated in some areas.

6.7 In the industrial sector in Cheshire and Warrington, deals were up 2% on 2011. Although small, this is a much more positive picture than the North West average (-12.5%). However, encouragingly in Cheshire West and Chester alone transactions increased 150% on 2011 at 1.86 million square feet (173,000 sq m). This was underpinned by large 'shed' deals in Ellesmere Port particularly, but commitments from manufacturing businesses also supported this growth. Headline rents of £6.03/ft² (£65/m²) were achieved in Ellesmere Port.

6.8 Office deals were up by 60% on 2011, with take up of 199,000 ft² (18,484 m²). However this did include the large purchase by Muse that is required to create the first phase of Chester Business Quarter. Top rents in Northwich at Cheshire Business Park (£14.50psf) reached levels closer to those at Chester Business Park (£16.60psf). However, there is a noted absence of modern floorspace, and the report highlights the fact that it is out of town business parks that are providing the current offer of this type.

6.9 Leisure and retail deals remained at a similar levels to 2011, although Cheshire Oaks is performing particularly strongly, with double-digit sales growth for the third consecutive year, and the best ever single day's trading since its opening 18 years ago.

6.10 The investment market reported only limited activity during 2012. Given the lack of investment transactions, the sale of a Northwich Town Centre building to accommodate Marks & Spencers represented almost 40% of the total investment sales value in Cheshire West and Chester.

6.11 Other positive news for Cheshire West and Chester was contained within the Dupont Business Confidence Report. This indicated that more than 300 companies were registered in Chester in the first half of 2012, four times more than the same period in 2011.

Cheshire and Warrington Business Needs Survey 2011 (published April 2012)

6.12 The key findings from the Business Needs Survey were as follows:

- **Business land and premises**-In total just 16% of businesses think it is likely that their business will relocate in the next 5 years, with 11% considering relocation very likely. The likelihood is higher amongst smaller employers (18% where 1-10 staff are employed). In 38% of cases of those likely to relocate relocation is likely due to businesses' current sites not being of an appropriate size (usually too small). Where more space is required this is most likely to be office space (77%) or warehousing and storage (48%), followed by industrial space (20%) and then retail (8%). In the majority of cases where relocation is likely businesses anticipate that they will remain in their current Local Authority (60%).
- **Business location**-The top three benefits of businesses being located in the Local Authority of Cheshire West and Chester are overall attractiveness of the area, access to transport links, and access to markets/neighbouring cities. Also significant benefits, mentioned by around a third of businesses, are proximity to suppliers (38%), availability of appropriate land and/or premises (35%) and adequate broadband coverage (34%). Two fifths of all businesses indicated at least one disadvantage to their business location (41%). The most frequently mentioned disadvantages were lack of parking, cost of business land or premises, and uniform business rates.
- **Re-location**-Only 16% of businesses consider it very likely that they will relocate in the next 5 years. Of those likely at all to relocate, in six out of ten cases they will be most likely to stay within the same Local Authority. Just 6% of businesses have premises that are not of an appropriate size, and in nearly 9 in 10 of these cases the premises are too small. This does suggest however some opportunity to help businesses in the area expand to more appropriately sized workplaces.

Summary

6.13 Market consultation has highlighted a number of issues, particularly in the office and industrial markets of Cheshire West and Chester. In terms of demand, the picture is mixed, although generally there is more demand for industrial stock. However, empty rates have hit certain stock hard, and many landlords have been significantly financially hit as a result. Due to the substantial headroom, rents have been suppressed and even declined as a result of this, although have been a little more stable over the last 12 months. The market feels that there will be little or no demand for land for design and build of new office space for up to 5 years, although there remains some potential to build new modern space for the distribution and logistics sector, which is more robust. The industrial market is experiencing more

churn, and there are signs that the market is improving, particularly in Ellesmere Port and to an extent in Winsford.

6.14 Economically, Cheshire West and Chester is diverse, with the Chester area most reliant on the service sector for employment, whilst other areas such as Ellesmere Port and Winsford contain more of a manufacturing base.

Stakeholder Consultations

6.15 This section contains commentary from key stakeholders and main employers in the area. It should be noted the comments may relate to each individual's role in the organisation, and may not necessarily be the views of the organisation as a whole. These complement the wider consultation process and findings of the company survey.

Bank of America

6.16 The Bank of America currently holds about 600,000 sq ft of freehold space at Chester Business Park. Is it looking to sell or lease some of this space, although not actively at present. There is an overall worldwide strategy to shed floorspace, which currently stands at 120,000,000 sq ft.

6.17 Looking forwards, there is no intention to expand, although some space will be occupied in the short-medium term by employees moving up from London as part of a cost-saving programme (approximately 200 staff).

Chester Zoo

6.18 Chester Zoo is recognised as one of the sub-region's signature attractions. It is a major development in the green belt to the north of Chester; a large employer and has a key impact on the socio-economy of the area. Chester Zoo is currently undertaking a transformational masterplan development project called 'Natural Vision' which involves an anticipated £125 million investment over the next 15 years.

6.19 Chester Zoo provides a significant boost to the local and regional economy. In 2009, an Economic Impact statement estimated that the zoo generates 643 jobs in the region resulting from spending by the zoo and its visitors, and 533 jobs in the local area. This will be enhanced by the Islands project which forecasts an increase in visitor numbers from 1.25 million paying visitors/year to 1.5 million in 2018. In addition to generating c35 on-site jobs during the construction of the Islands zone, it is forecast that Islands will generate an additional 76 fte jobs within Chester Zoo and off site.

6.20 Further phased zones similar to the Islands concept are being planned for delivery over the next 15 years that will see the core zoo grow in size from 37 hectares to 50 hectares. In addition, the zoo has outline permission to deliver a 120 bed themed hotel integrated into a future zone. It is estimated that the full "Natural Vision" masterplan will create an additional 661 jobs in the region of which 444 jobs would be local.

EA Technologies

6.21 The company operates at a national and international level in the power asset management solutions. Its location at Capenhurst Technology Park offers good access and is only three kilometres from the nearest motorway junction. The company is currently expanding after a period of contraction, currently employing 215 staff (doubling in size in the last 5 years). There are plans to expand to 400 staff in the next 5 years. It used to own the site at which it is located – but this is now owned by Jaymar Estates. EA Technologies currently occupies just two buildings which also offer expansion space.

Ineos Chlor

6.22 The chemicals industry in general has had limited support from Government and Ineos have no expansion plans in Cheshire. As a general rule Ineos rarely sell land. Their 5 year strategy includes maximising income from their current landholdings, in the form of potential leases to complementary firms that may manufacture products and strengthen supply chains, as well as producing a rental stream.

NPL Estates

6.23 NPL is a major landowner in and around Northwich. The land is available for a number of uses including residential, commercial and an underground gas pipeline facility.

Essar Energy

6.24 Shell currently has no expansion or contraction plans, although they are currently starting to conduct a review into potential interest from companies looking to locate on their land in terms of complimentary industries or manufacturing. However, this review is in its early days.

Urenco

6.25 Urenco is owned by the British and Dutch governments and the German utility groups Eon and RWE. The 72ha site is used to turn mined uranium into fuel for the nuclear industry. For 2011 UK statutory accounts showed a Turnover of £420,898,000. It has an order book that extends beyond 2025, and more than three quarters of its production is exported. Much of the technology in use at Capenhurst remains closely guarded for both commercial and national security reasons.

6.26 The Urenco site at Capenhurst has an unique infrastructure. It is a registered nuclear site and its licence does not allow third parties to operate there. There is some land available for expansion which will be developed in the near future. Urenco have ambitious expansion plans – although this is more related to turnover, staff and projects, rather than significant land and property development. Its site is relatively isolated and the company would like to improve access from the motorway, but this is difficult.

Peel

6.27 Peel Holdings are a major landowner in the Ellesmere Port area. The Atlantic Gateway is a cross sector growth strategy within the region which has the following strategic objectives:

- To establish Atlantic Gateway as an internationally significant investment opportunity
- To drive transformational economic change and opportunity
- To enable a collaborative planning and policy framework

6.28 The vision of the strategy is to maximise investment into the Atlantic Gateway area and support the delivery of major projects by local enterprise partnerships (LEPs) and other partners. By 2030, there is the potential for some 250,000 new jobs to be created in the Atlantic Gateway area and around 140,000 of these jobs will be associated with Atlantic Gateway priority projects, involving £14 billion of new investment.

6.29 The Ocean Gateway is a 50 year strategy encompassing over 50 projects across the sub-region and amounts to a £50bn investment. Within Cheshire West and Chester Ince Park is a flagship project. The 104.5ha site at Ince Marshes has planning permission for Refuse Derived Fuel energy generation and an associated Resource Recovery Park. This will provide business opportunities and employment in the environmental and waste sector. This will complement activities within the neighbouring Stanlow area.

6.30 Some key projects that Peel have in the pipeline in Cheshire West and Chester include Port Bridgewater, Rossfield Park and Ellesmere Quays Scheme. Peel Ports acquired Bridgewater Paper Mill (16.84ha), situated on North Road Ellesmere Port. Planning permission was granted in April 2013 for change of use from industrial to port related activities. This is a strategic multi-modal site as identified in the Draft Mersey Ports masterplan. Rossfield Park is located to the north of Ellesmere Port town centre and development proposals are for mixed use residential and employment development. The Peel Group are working in partnership with the Waterways Trust and Cheshire West and Chester Council to transform Ellesmere Port waterfront into a residential, tourism and leisure destination.

BP Castrol

6.31 BP Castrol has ceased operations in Ellesmere Port and the refinery and national distribution centre has subsequently closed. Their 20ha site is therefore surplus to requirements which includes a mix of land, buildings and specialised facilities. Opportunities for bringing the site forward for future redevelopment are being explored. However, it is likely to be contaminated and will need some remediation.

Summary

6.32 As a result of significant supply, office rents are relatively static and take up is low. The amount of headroom means that there is little need for land in the short term, and although some demand for office space remains speculative build has not occurred for a number of years. It is felt that at £14psf in Chester and £17-18psf in Chester Business Park, rents cannot move lower but are likely to remain at this level for some time.

6.33 Empty rates are having a significant impact on industrial rents, bringing them down to a point where landlords can attract an occupier and make marginally more income than it would cost to retain an empty building. Ellesmere Port remains the most popular location for attracting industrial occupiers, whilst Winsford remains comparatively self-contained. There is plenty of churn in stock as occupiers

look for shorter leases, and most opt for second hand stock. More positively, deals are increasing and there is evidence that the distribution and logistics sectors are continuing to perform well in the Ellesmere Port area, particularly where the council are using their own assets and land to actively attract occupiers.

6.34 Occupiers and Employers have reported few intentions to expand, although there are some cases where this will occur. Despite this, many are looking to invest in their current business and increase the efficiencies of their landholdings, which may provide further investment opportunities.

6.35 There are some major stakeholders and employers located within the Borough with key development proposals in the pipeline. Such schemes have the opportunity to provide significant economic benefits to the Borough over the next 20 years.

7 Employment Land Supply

7.1 This section of the report assesses the Borough wide employment land supply, in terms of its quantity, type, quality, suitability and availability for future economic development. The Council is required to maintain and review the portfolio of employment land to ensure that this is sufficient to meet new business and investment needs.

7.2 'Employment' development includes sites falling within use classes B1, B2 and B8 of the Town and Country Planning (Use Classes Order) 1987 (as amended):

- B1 Business - Offices, research and development of products and processes and light industries
- B2 General Industrial - use for industrial processes other than those falling within Class B1 (excluding incineration purposes, chemical treatment, landfill or hazardous waste)
- B8 Storage and Distribution - this includes open storage

7.3 The employment land supply is based on:

- Undeveloped employment land that is allocated in adopted Local Plans for the Borough
- Sites with planning permission for employment use (either allocated/windfall) where development has not started^(ix)
- Sites with planning permission for employment use (either allocated/windfall) where development is under construction

7.4 As noted in the methodology, large sites of >0.25ha/500m² floorspace are included within the supply where they meet the above criteria. However, it is noted that in addition to these sites, there are a wide range of existing employment sites in use across the Borough. There may also be additional vacant/derelict brownfield sites that are unallocated or without permission, which could provide a valuable contribution towards the overall land supply in the future.

7.5 To determine what land is needed for the new Local Plan period to 2030, it is firstly necessary to establish the existing baseline employment land supply in the Borough.

ix This includes sites that have planning permission pending section 106 agreements

Employment Land Supply - Quantitative analysis

Headline Employment Land Supply

7.6 The table below summarises the headline Employment Land Supply, by type^(x), to a base date of 1st April 2013. A full list of the sites making up this supply is included in appendix A. This is supplemented by a suite of proformas for each site considered as being realistically available for employment development, contained in Appendix G.

Table 7.1 Headline employment land supply by type of use (ha)

	B1a	B1c	B2	B8	Mixed B Uses	Other	Grand Total
Allocation, no permission	24.75		0.95	2.03	164.00	98.99	290.72
Planning permission, development not started	29.05	6.89		22.81	27.42	30.54	116.72
Planning permission, development under construction	3.80			0.06	5.63	15.22	24.71
Total	57.60	6.89	0.95	24.90	197.05	144.75	432.15

7.7 This illustrates there is a **headline supply of 432.15ha** of employment land, with the potential to be developed for office, industrial and storage/distribution uses. The portfolio of land is widely distributed across the Borough, to provide for a choice and range of site sizes and types to meet different investment needs. Many of the sites are flexible to allow for the development for a mix of employment types.

7.8 The majority of sites that make up the employment supply are outstanding undeveloped Local Plan allocations. These have been reviewed through this Study to ensure that they remain fit for purpose and are capable of being developed for an employment use over the new Plan period to 2030.

7.9 A significant amount of this supply is located at Ince Marshes. The site includes 51ha of developable land that is identified within the headline supply. This is in line with the extant planning commitment for a Resource Recovery Park and Energy from Waste facility. The proposal covers a site of 104.5ha in total and incorporates approximately 20ha of land for a nature reserve. It could result in approximately 180,000m² of new built development. The site as a whole is classed as sui-generis in use and therefore would not fall within the criteria for this study. However, as considered further below, there are plots of land within the proposed scheme identified as B use class within the Environmental technologies sector. Whilst the majority of the site is outside the remit of the current study, it is recognised that this scheme will make a significant contribution to local economic growth through both the creation of new jobs and economic output.

x The Use Classes Order as amended defines these uses as; B1a - office, B1b - research and development, B1c - other industrial process that could be carried out in a residential area without causing detriment to amenity, B2 - general industry, B8 - storage and distribution. Note: all figures are rounded to 2 decimal places

7.10 The future development of the site at Ince Park should be monitored. As the site is developed, it may be that some of the operations linked to the resource recovery park fall within the B-use classes. Should any proposals for development falling within the B-use classes come forward in the future, this will be treated on its planning merits in accordance with current and emerging development plan policy. The Council's Local Plan Preferred Policy Directions (consultation August 2012) seeks to safeguard existing and future waste management facilities, including sites such as Ince Park that have planning consent but are not yet operational.

7.11 The headline supply of employment land also includes 40ha of land to the east of Ince Park. This is currently allocated through the Ellesmere Port and Neston Local Plan for oil and chemical related uses, or as expansion land for the adjacent fertiliser company. The future use of this site would need to be considered through emerging Local Plan policy.

Realistic Employment Land Supply

7.12 From the headline supply, there are other potential losses of employment land, where there are existing planning commitments for alternative forms of development (this does not take account of any pending applications, or sites with other known development constraints. These are identified under the worst case scenario). Table 7.2 identifies the additional sites that could be lost from the employment land resource if these permissions are fully implemented:

Table 7.2 Potential employment land losses (based on commitments as at 1st April 2013) (Ha)

Spatial Area	Site Reference	Name and Address	Sum of Area committed for alternative uses (Ha)
Chester	BLA/0001/E	Bumpers Lane	25.00
	BLA/0003/E	7 Knutsford Way Chester Cheshire CH1 4NS	0.10
	BLA/0006/E	6 Knutsford Way Chester Cheshire CH1 4NS	1.56
	BLA/0007/E	Boots C S R Mercury Court Chester Cheshire	1.54
	CHC/0012/E	Rockmount 13 Liverpool Road Chester Cheshire CH2 1AA	0.06
	CHC/0013/E	Richard House 80-84 Lower Bridge Street Chester Cheshire CH1 1RU	0.14
	UPT/0001/E	Redevelopment of part of Countess Hospital	2.00
	Ellesmere Port	ELT/0001/E	Ince Park
ROS/0007/E/02		Former Gas Board Site, Rossmore Road East, Ellesmere Port (proposed residential)	7.82
ROS/0010/E		Century House, Dock Street, Ellesmere Port	0.16

7 Employment Land Supply

Spatial Area	Site Reference	Name and Address	Sum of Area committed for alternative uses (Ha)
	ROS/0012/E	Portside House Lower Mersey Street Ellesmere Port Cheshire CH65 2AI	0.13
Rural	FAR/0002/E/01	Stretton Dairy, Stretton Hall Lane, Stretton, Chester, SY14 7JA	1.50
	HEL/0002/E/04	E5.20 Land at BICC Helsby	2.65
	MAL/0007/E	The Creamery, Post Office Lane, Hampton, Malpas, SY14 8JQ	1.86
	TAT/0002/E	Chapel Lane, Milton Green	1.00
	WEC/0003/E	Former Factory Site Warrington Road Cuddington Northwich Cheshire CW8 2Sn (Former Express Dairy Foods Factory)	9.18
Northwich	SHA/0003/E/02	Lostock Triangle site, Manchester Road, Lostock Gralam, Northwich	4.37
	SHA/0003/E/04	Land Opposite Cheshire Business Park Cheshire Avenue Lostock Gralam Northwich Cheshire	5.15
	WIC/0015/E	Land And Buildings At Northwich Marina, Chester Way, Northwich	2.24
	WIR/0001/E/01	E5.2 Land at Lostock Works Railway Sidings	7.68
	WIR/0006/E	Land to the South West of Lostock Works, Griffiths Road, Lostock Gralam	3.10
Winsford	WOV/0001/E	E5.11 Land at Church Street/Overway	0.28
	WOV/0006/E	Cheshire Warehousing Ltd New Road Winsford Cheshire CW7 2NU	1.20
	WOV/0002/E/03	Land off Barlow Drive (part E5.16 land on Woodford Park Industrial Estate)	2.10
Total			116.44

7.13 It is evident from the above table that a total of 116.44ha could be lost from the existing employment land resource, as a result of existing planning commitments to develop the land for alternative uses. A significant amount would be lost from the Ellesmere Port area, primarily through the development of Ince Marshes for an Energy from Waste facility and Resource Recovery Park. An additional 25ha of employment land at Bumpers Lane in Chester is a historic employment allocation in the Chester District Local Plan. The site is severely constrained so is excluded from the realistic employment land supply.

7.14 Discounting the sites likely to be lost to alternative uses therefore, there is a realistic supply of **315.70ha** of employment land in the Borough. Table 7.3 summarises the spatial distribution of these sites across the Borough;

Table 7.3 Realistic Employment Land Supply (Ha)

Spatial Area	Sum of Total Site Size (Ha)	Sum of Area committed for alternative uses (Ha)	Realistic employment land supply (Ha)
Chester	43.70	30.40	13.30
Ellesmere Port	225.99	43.73	182.26
Rural	64.47	16.19	48.27
Northwich	69.67	22.54	47.13
Winsford	28.32	3.58	24.74
Total	432.15	116.44	315.70

7.15 Whilst the employment land portfolio is distributed Borough wide, the majority of the resource is located in the Ellesmere Port area. As identified above, it is also where the greatest loss to other uses is identified. However, a large proportion of this is at Ince Park where it is a technical rather than an actual loss in terms of employment creation.

7.16 Using the realistic employment land supply figure, table 7.4 shows the breakdown of these sites by type of use:

Table 7.4 Realistic employment land supply by type of use (Ha)

	B1a	B1c	B2	B8	Mixed B Uses	Other	Total
Chester	10.08	1.96	0.00	0.00	1.26	0.00	13.30
Ellesmere Port	9.73	1.35	0.00	18.98	96.65	55.55	182.26
Rural	17.22	0.00	0.00	5.92	25.13	0.00	48.27
Northwich	17.43	1.00	0.95	0.00	27.75	0.00	47.13
Winsford	0.90	2.58	0.00	0.00	21.26	0.00	24.74
Total	55.36	6.89	0.95	24.90	172.05	55.55	315.70

7.17 A significant amount of the realistic supply is identified for a mix of B-class uses. This allows for a flexible supply of land to meet a range of business requirements. The sites at Ince Park and Kemira are identified as 'other' for the reasons outlined above.

7.18 Table 7.5 illustrates the spatial distribution of these sites across the Borough and estimates their forecast availability^(xi). Appendix B details the forecasting assumptions made for each site.

Table 7.5 Realistic employment land supply forecast availability (years/ha)

	Forecast availability (years)				
	0-5	6-10	10-15	15+	Total
Chester	12.04	1.26	0.00	0.00	13.30
Ellesmere Port	99.24	42.86	0.00	40.17	182.26
Rural	44.77	3.50	0.00	0.00	48.27
Northwich	46.13	1.00	0.00	0.00	47.13
Winsford	20.09	4.65	0.00	0.00	24.74
Total	222.27	53.27	0.00	40.17	315.70

7.19 It is evident from the above that the majority of the employment land resource is available within the short term (i.e. 0-5 years). This is largely due to the planning status of sites; many benefit from full or outline planning permission for employment development. The bulk of the employment land resource is located within the Ellesmere Port area and includes several large scale sites (i.e. 68ha of land is available at Kemira and the former Ince Power Station alone). Many of the other employment sites are allocations within the former District Local Plans. The likelihood of these sites being developed for employment use in the emerging plan period has been considered through this Study. There are clearly less employment sites identified within the realistic portfolio in the medium to long term, as would be expected given the stage of the emerging Local Plan for Cheshire West and Chester. New employment sites will need to be identified through the emerging Local Plan and subsequent Allocations/Development Management Local Plan to meet the Borough's employment land needs in the medium to long term.

7.20 The analysis by area indicates that in Chester there is limited land available for employment development, given that the Bumpers Lane allocation is excluded from the headline supply. A separate Technical Study has been undertaken on this site. The recommendations indicate that the development of this site is not economically viable at the present time under current market conditions. This is primarily due to the land contamination on the site and the cost of infrastructure provision, in addition to other development constraints such as flood risk and ecology. The site is a former landfill site and is severely contaminated. The future development of the site is dependant on the implementation of the Chester Western Relief Road and the need to raise ground levels to alleviate/mitigate any possible flood risk. Part of the site is designated in the local plan as a feature of local nature conservation importance. It also runs alongside the River Dee, a european protected site.

xi Forecasting uses a base date of 1st April 2013 in line with the employment land monitoring information. It is categorised as 0-5 years, 6-10 years, 11-15 years and 15+ years. Existing planning commitments are identified within the 0-5year timeframe, unless there are known constraints to delivery within that timescale.

7.21 The Technical Study has considered these issues, including a phase 1 contaminated land assessment, and the likely costs required to bring the site forward for future employment development. It concludes the development is not viable without the provision of fully serviced access roads and the removal of uncertainty regarding the Chester Western Relief Road. Development plots may require additional subsidy to contribute towards building costs. The Council is currently exploring funding opportunities available to address these identified barriers to delivering the site during the Plan period. It is therefore recommended that, although the site is excluded from the headline supply for the purposes of this analysis, it should be retained as part of the employment land portfolio until the availability of potential funding streams have been explored fully. The site also needs to be considered in the context of the proposed Chester Western Relief road.

7.22 The Rural area appears to have a large supply of employment land in comparison to the towns of Northwich and Winsford. The majority of sites in the rural area however, are smaller in scale and are typically less than 5ha in size. The site at Urenco, Capenhurst is an exception to this and is a major developed site located in the Green Belt.

7.23 This section has analysed the 'realistic' amount of employment land available as at the 1st April 2013. Further employment land losses could be seen in the future if pending planning applications are considered, together with other known development constraints, which would further impact on the overall employment land resource in the Borough. This is assessed further as a 'worst case scenario' below.

Worst case employment land supply

7.24 The employment land resource in the Borough could potentially be reduced further. There are a range of factors that could effect the likelihood of a site being developed including; the retention of sites for specialist uses or the expansion of specific occupiers, land contamination or other known development constraints, or the potential loss to alternative uses. Appendix C identifies the sites where there could be further losses of employment land from the overall supply. Table 7.6 below summarises the potential implications of these on the overall Borough wide land supply and by spatial area.

Table 7.6 Employment land supply - worst case analysis (ha)

	Realistic Supply (ha)	Further Potential Loss (Worst Case) Ha	Worst case scenario (ha)
Chester	13.30	1.43	11.87
Ellesmere Port	182.26	37.29	144.97
Rural	48.27	32.76	15.51
Northwich	47.13	8.02	39.11
Winsford	24.74	14.32	10.42
Total	315.70	93.82	221.88

7.25 This illustrates that as a worst case scenario, 221.88ha of employment land would be available borough wide. There is the potential for the employment land resource in Ellesmere Port to be reduced further, primarily as a result of sites at Hooton Park (Vauxhall) and Kemira. Some of the allocated employment land at Hooton Park is mainly operational land, landscaping around the existing GM Vauxhall site or owner specific in use. Therefore part of the site (approximately 29ha) is unlikely to be available for new economic development. The land at Kemira (40.17ha) is reserved for specialist uses in the oil and chemical related industries only under current policy, therefore presently it is not available for general B-class uses. Other smaller scale sites are identified as being constrained, or are likely to be developed for a mix of alternative uses as part of wider regeneration led schemes.

7.26 In the rural area, the amount of available land is reduced as the former BICC site is likely to be developed for alternative uses. In Northwich, the available employment land is reduced as some sites are unlikely to be developed for office/industrial use. In Chester there is the potential for further small scale losses of employment land within the city centre.

Employment Land Supply - Qualitative analysis

7.27 The information above has concentrated on the quantitative analysis of the employment land supply (for B use classes) in the Borough. The National Planning Policy Framework makes it clear that the evidence base should also include an assessment of the qualitative business/industrial needs, and its sufficiency and suitability to meet identified needs. The BE Group Study (2009) used an objective scoring system to consider the strengths and weaknesses of the sites, in terms of their development potential and market attractiveness. This scoring system has been rolled forward for the purposes of this update and is contained in Appendix D, except for the forecasting methodology. The forecasting timescales have been amended to better reflect the proposed Local Plan timeframe and to align with the Council's Strategic Housing Land Availability Assessment. It has been assumed that many of the factors (i.e. proximity to the strategic highway network, prominence, public transport, services availability, development constraints and flexibility) will remain unchanged from the previous assessment. Where more up to date information is known on sites then this has been provided. This primarily relates to any changes in planning status, environmental setting or site availability. Sites contained within the 'realistic supply' have been used for the qualitative analysis.

7.28 Two scores are provided in the qualitative assessment; (i) a total score and (ii) a market led score. More weight should be given to the market led score as these are the characteristics that are very difficult to change.

7.29 Overall, Borough wide the highest scoring sites are fairly evenly distributed across the Borough. This includes sites such as Rossmore Road and New Bridge Road in Ellesmere Port and urban regeneration sites within Chester city centre. In the rural area, the Urenco site at Capenhurst scores reasonably well.

7.30 Under the market led score, the highest scoring sites in the Borough are in the Ellesmere Port area. This is due to the strong transport links and prominent locations adjacent to the motorway network. It also takes account of the extensive regeneration that is taking place.

7.31 In line with the 2009 Study therefore, it is better to consider the qualitative analysis by spatial area rather than as a tool for comparing sites across the Borough as a whole. There is a need to consider economic markets operating both across and within the area. In each of the key areas in the Borough, the following sites score well for market attractiveness;

- **Chester:** The city centre sites regeneration sites in the north east action area score most positively, together with Chester Business Park. These reflect their positive environmental setting and location to public transport and primary routes.
- **Ellesmere Port:** The highest scoring sites are those along the M53 corridor (Rossmore Road, New Bridge Road areas, Hooton Park). The sites located further away from primary routes score less favourably than others in the Ellesmere Port area, such as Ince Park.
- **Northwich:** Gadbrook Park and the remaining land at Lostock Triangle have the highest scores (also for total score) and are highly attractive for new high quality office development. The lowest scoring sites are Denton Drive Industrial Estate, Lostock Works House, land to the south and west of Lostock Gralam railway station and land at Soot Hill. This is a result of their environmental setting as existing industrial locations.
- **Winsford:** Land west of Road One highest scoring site, mainly a result of the greenfield location. It also scores well on flexibility. The land on eastern industrial estate scores poorly in comparison to the other employment sites in Winsford, however these sites continue to provide a local need.
- **Rural area:** remaining sites in Helsby score highly for market attractiveness reflecting their proximity to the M56. Urenco, Capenhurst also scores highly. The sites in Neston score low as they are on existing industrial estates and are not in close proximity to the highway network. However they continue to have an important role locally to provide new employment opportunities.

7.32 In general terms, it is important that the sites that score well are protected from alternative forms of development. In line with the findings of the BE Group Study (2009), this scoring system is only one method of assessing the quality of sites. It should be noted that this assessment only takes account of current accessibility. It is important to note that the proposed development at Ince Park incorporates significant new infrastructure provision and opportunities for multi-modal transport. The qualitative assessment therefore needs to be considered alongside other sustainability factors. In some instances lower scoring sites play an important role in meeting the needs of different sectors and local employment land needs. Generally the industrial sites score less favourably in the assessment. However, sites such as Chester West Industrial Estate, Denton Drive Industrial Estate and Winsford Industrial Estate provide a valuable resource in these local areas.

7.33 The table below highlights the Borough wide distribution of the realistic supply of employment land and the proportion of sites that are serviced. A site is assumed to be serviced if utilities and road access are readily available. This would apply to infill sites in existing employment areas, or where major sites have been opened up. Large allocations, where although services run to the edge of the site they have not been provided to the site itself, are not considered to be serviced.

7 Employment Land Supply

Table 7.7 Realistic Supply of Employment land that is serviced (Ha)

Spatial Area	Serviced	Number of Sites	Site Area (Ha)
Chester	No	4	3.43
	Yes	10	9.87
Chester Total		14	13.30
Ellesmere Port	No	9	147.44
	Yes	10	34.83
Ellesmere Port Total		19	182.27
Northwich	No	9	27.45
	Yes	7	19.68
Northwich Total		16	47.13
Rural	No	3	6.66
	Yes	15	41.61
Rural Total		18	48.27
Winsford	No	4	19.99
	Yes	6	4.74
Winsford Total		10	24.73
Total not serviced	No	29	204.97
Total serviced	Yes	48	110.73
Total		77	315.70

7.34 There are 77 sites identified in the realistic supply, the majority of these are understood to have all services provided and in place.

7.35 Appendix E analyses the suitability of these employment sites to different market segments.^(xii) In line with the findings from the BE Group Study (2009), across the Borough there appears to be a good range of sites for most of the market segments. There is a possible shortage in some segments. However, in some sectors the Borough wide supply is more limited. This includes research and technology parks, high quality business parks and incubator/SME cluster sites. Suitability of sites to different market segments also varies by areas within the Borough:

xii as identified in the ODPM's Employment Land Review Guidance

- **Chester:** The City is primarily an established office location. There is provision for high quality office development at the Chester Business Quarter in the city centre and Chester Business Park outside the city centre. However, most of this land at the Business Park is now developed and there is little land remaining for future development. There are few sites and land available to meet other market segments, possibly limiting the city's future economic growth potential. As noted in chapter 5, there appears to be demand for smaller premises under 250sqft for start up businesses or companies wishing to downsize.
- **Ellesmere Port:** Whilst there are some sites available for office development, the majority of the sites/land available are for general industrial or heavy/specialist industries. Likewise there is a substantial supply of sites that would be suitable for recycling/environmental industries. Many of the sites in the area are reserved for specific occupiers and may not generally be available for new inward investment in the future. There are no sites for high quality business parks or research and technology/science parks (however, the site at Capenhurst is in close proximity to the Ellesmere Port area). One site is identified for warehouse and distribution and two sites for specialised freight. These segments may offer further employment opportunities in the area in the future, particularly given the location and opportunities for multi-modal transport.
- **Northwich:** There is a good balance of sites/land available across most sectors; office and industrial, offering a flexible supply of employment land. There is an opportunity for growth in warehousing/distribution, given the proximity within the Borough to the M6. The town is an established office location and Gadbrook Park is identified as a high quality office location. However, this is substantially developed and there is little land remaining for future development. Lostock Triangle (Cheshire Business Park) is also identified as being a high quality office location although there is limited land remaining for employment use.
- **Winsford:** Similar to Northwich, there is a good balance of land/sites available across most sectors; office and industrial. The land to the West of Road One may offer future opportunities for high quality office and Industrial development. There are also opportunities for further employment development at Woodford Park.
- **Rural:** There are a limited amount of sites/land available for future employment development in the rural area. There are some small sites available for local office/industrial use - primarily Chowley Oak, Tattenhall and Hampton Heath, Malpas. The sites at Capenhurst are for specific occupiers and provide opportunities for research and technology/science park developments. Six of the sites identified are reserved for expansion land for specific occupiers.

Employment Areas

7.36 The BE Group Study (2009) made an assessment of the main employment areas within the Borough, to provide guidance on their continued viability. Some sites may come under pressure for housing development and/or may be contained within the Council's Strategic Housing Land Availability Assessment (SHLAA). The NPPF recommends that the Employment Land Review and the SHLAA should be undertaken around the same time. Assumptions on land available for economic development and its sufficiency and suitability to meet future identified needs, should inform the identification of sites in the SHLAA. Appendix F contains the Employment Area Hierarchy^(xiii). Sites are graded in the context of the study area and not at a sub regional level.

xiii Employment Land and Premises Study, (BE Group 2009)

Summary

7.37 An initial review of the portfolio of employment land suggests that there is a good supply of land/sites across the Borough. There is a headline amount of 432.15ha of employment land potentially available for future economic development, at a base date of 1st April 2013. However, further analysis of these sites indicates that there are some potential losses to alternative uses (based on existing planning commitments). Assuming these permissions are implemented, this would result in a more realistic amount of 315.70ha employment land remaining in the portfolio.

7.38 Information has been provided on the distribution of these sites making up the realistic supply across the Borough. The key findings suggest there is a limited amount of supply in the Chester area, given the size of its population and function as a sub-regional centre. The majority of the employment land resource is located in the Ellesmere Port area, although this supply is complex. Northwich has a fairly balanced supply of land, by type, location and quality. The supply in Winsford is primarily industrial in nature. In the rural area, the land supply is more limited - the proposed developments at Capenhurst skew the figures. Opportunities for small scale rural employment development are limited.

7.39 Forecasts indicate that the majority of the employment land resource is available in the short to medium term. This is as would be expected given the stage of the Council's emerging Local Plan. New suitable employment sites, of a range of sizes and types, will need to be identified through the Local Plan to meet employment land requirements for the medium to long term. The majority of the realistic employment land supply allows for a mix of B use classes to be developed. This offers flexibility to meet a range of business requirements. 62% of the sites within the realistic supply are likely to be serviced.

7.40 Qualitative factors are likely to be important in attracting future economic investment and supporting growth. The analysis shows there are a good range of sites across the Borough, which would be suitable for a range of market segments. However, opportunities for new research and technology parks, high quality business parks, incubator/SME cluster and warehouse and distribution sites are more limited. The suitability of sites to different market segments also varies by area within the Borough, depending on the role and function of those settlements.

7.41 As a worst case scenario, there could be additional sites either lost from the employment land resource to other uses, or being retained for use by specific occupiers. This would mean that as a worst case, there could be a minimum of 221.88ha of employment land remaining.

8 Employment Land Demand

8.1 This section makes an assessment of the employment land that is likely to be required over the Local Plan period to 2030. Different approaches to forecasting employment land requirements can be taken, and the prediction of long term trends can be difficult as economic growth is typically over long term cycles. Past trends do not necessarily reflect changing economic circumstances or likely future needs. It is therefore important that any future employment land portfolio for the Borough is focused on both the quantity and quality of provision, and provides opportunities for a wide range of types and sizes of sites to cater for a variety of future business and investment needs.

8.2 The following methods have been used to objectively forecast the quantity of employment land that would need to be provided throughout the plan period:

- The historic take up and development of employment land in the Borough
- Employment land forecasting, using the Cheshire Halton and Warrington Econometric Model (CHWEM)

8.3 The methods used are not intended to provide a definitive requirement, as there are a wide range of other influences that could affect the future levels of economic growth in the Borough. The findings are intended to provide a broad indication of where future economic growth could be, to inform the preparation of positive planning policies that support future economic growth in the Borough.

Historic Take Up

8.4 The data available on the historic take up and development of employment land in the Borough is based on monitoring information from the former District Authorities prior to Local Government Reorganisation. The figures should be treated with caution as there may be inconsistencies in the monitoring methodology used across the former district areas and over time. One-off developments, or non-recording of losses of employment land to other uses, may also skew the figures. However, the records do provide an indication of the amount of employment land that has been developed over past years. The average amount of employment land developed per year can then be calculated and projected forward over the plan period. This could be used to give a broad estimation of the amount of employment land likely to be required to 2030. However, it is recognised that within this amount there are likely to be spatial variations within the Borough, and on the type and size of site needed to accommodate future needs. It is not possible to disaggregate the historic take up figures into the spatial areas of Chester, Ellesmere Port, Northwich, Winsford and the rural area. Table 8.1 below summarises the historic take up and development of employment land across the Borough.

Table 8.1 Borough wide historic employment land take up (ha)

Year	Chester CC	Ellesmere Port & Neston BC	Vale Royal BC	Take up (Ha)
1986-1996				180
1996-1997	11	1	2.57	14.57

Year	Chester CC	Ellesmere Port & Neston BC	Vale Royal BC	Take up (Ha)
1997-1998	3	10.1	27.51	40.61
1998-1999	4	0	5.1	9.1
1999-2000	0.45	1	0.9	2.35
2000-2001	2.25	3	0.52	5.77
2001-2002	0.99	4	10.02	15.01
2002-2003	3.44	12.1	10.19	25.73
2003-2004	4.13	3.9	10.28	18.31
2004-2005	7.59	4.36	7.9	19.85
2005-2006	31.85	47.02	12.01	90.88
2006-2007	0.31	3.77	9.76	13.84
2007-2008	3.11	7.89	10.05	21.05
2008-2009	3.44	7	21.53	31.97
2009-2010	4.9	2.99	6.04	13.93
2010-2011	1.2	0.91	6.35	8.46
2011-2012	5.11	12.63	11.25	28.9
2012-2013	10.02	10.55	7.54	28.11
Total	96.79	132.22	159.52	388.53
Average 1996-2013	5.69	7.78	9.38	22.85
Average 1986-2013				20.01

8.5 This illustrates that over a 17 year period since 1996 there was an annual average take up of 22.85ha per annum. If these trends were to continue, to 2030 there would be a need for a total of 388.45ha of employment land to be provided.

8.6 There is some limited employment take up data from 1986-1996. This suggests during this period 180ha employment land was developed. Using the average over the total period 1986-2013, take up is approximately 20ha per annum, which would equate to a requirement of 340ha (for the remaining plan period 2013-2030).

8.7 As previously noted there are a number of caveats in using the historic take up data. These are gross figures and will include some employment land losses to other uses.

Historic Losses of Employment Land

8.8 The forecasting based on historic take up results in a gross land requirement. This assumes that other existing employment land currently in use will continue to be lost to alternative forms of development. It assumes these losses would be at a similar rate as between 1996 and 2012. As there is limited historic data on such employment land losses, the difference between the gross and net figures^(xiv) cannot be clearly identified. It is likely therefore that historic take up rates may overstate the need for new employment land. As a result, since 2009 some data has been collected on the loss of existing/allocated employment land to alternative uses.

8.9 Since 2009 there have been losses of employment land on allocated/large sites within the Borough. Whilst this is not a long enough time period to determine definitive trends, it gives an indication of the extent of losses to alternative uses in recent years.

8.10 For the period 2009-2013, taking account of employment land losses, the take up rate would be 12ha/pa. For the period 2010-2013 (i.e. the first 3 years of the new Local Plan period), this would be 11.4ha/pa (which would result in a requirement for 193.8ha). This low level of employment land take up is indicative of the current economic climate and national policy requirements for Council's to demonstrate a 5 year housing land supply. As the Borough does not currently have a 5 year housing land supply, some employment sites are being lost to other uses (as also identified in chapter 7). This is likely to be a short term trend.

8.11 This illustrates that there is likely to be a wide variation between the gross and net average employment land take up rates. A cautious approach should therefore be taken in applying historic take up rates to forecasting future employment land requirements. A median value of 17ha/pa is considered reasonable given the wide variation identified above. This would equate to a residual requirement of **290ha**.

Flexibility Factor

8.12 The BE Group Study (2009) incorporated a flexibility factor to allow scope for churn and offer a range and choice of employment sites. This was 27% in line with the methodology used for the Regional Spatial Strategy for the North West. If this buffer was applied to the median take up value it would result in a take up rate of 21.59ha/pa, which equates to a total need for approximately **368ha** of employment land for the remaining plan period (2013-2030).

Employment Land Forecasts

8.13 In order to produce employment land forecasts, it is necessary to estimate future employment levels. However, employment numbers and other measures of economic activity are affected by (and indeed affect) population levels and house-building. Population and housing development also influence each other. For example, a net increase in the local housing stock is likely to result in an increase in the resident population. It is also likely to result in an increase in the number of local jobs, as:

xiv the net figure relates to employment land take up, minus employment land losses

- the additional house-building stimulates local economic growth, by creating extra demand, either directly or indirectly, for the goods and services supplied by local (and non-local) firms. For example, local firms may be employed to build the new houses. Even if the contractors and their employees are not locally-based, the construction site workers are still likely to spend some money in local shops and other local business premises.
- a larger population requires more goods and services, thus increasing demand for goods and services supplied by local (and non-local) firms.

8.14 The Cheshire Halton and Warrington Econometric Model (CHWEM) ^(xv), which is the Cheshire Local Authorities' most reliable means of generating forecasts of future employment, is able to capture some of these linkages between housing, population and the economy.

8.15 The methodology takes population forecasts and resultant employee forecasts. It translates Standard Industrial Classifications (SIC) ^(xvi) employment sectors jobs growth to floorspace requirements according to use class B1, B2 and B8. These are then translated into an employment land requirement using standard employment density ratios, other data (e.g. vacancy rates) and other assumptions (e.g. about off site working). The employment land forecasts were therefore produced by using the CHWEM employee forecasts in tandem with other data and assumptions.

8.16 The CHWEM's forecasts extend to 2025 only. Hence the floorspace and employment land forecasts for 2026-2030 were obtained by extrapolating the 2020-2025 floorspace trend forward for another 5 years. ^(xvii)

8.17 The forecasting methodology has been adapted from that used in the Employment Land Study (BE Group, 2009), to reflect local circumstances. The changes in methodology, along with the more recent data, mean that the forecasts presented in this 2013 Update Study cannot be directly compared to the BE Group Study (2009). However, when the two methodologies are applied to the same data, the findings suggest that the revised methodology is generally more cautious and results in a lower net increase in demand for employment land over the forecast period.

8.18 There are some assumptions and hence limitations with this approach. It should be noted that whilst the CHWEM model takes account of possible housebuilding, it does not take account of other ongoing or future development projects, policies or initiatives. Apart from housing development therefore, the CHWEM employee forecasts, and hence the employment land forecasts that rely in part on the

xv Cheshire East Council's Economic Development and Regeneration Team maintains and operates the CHWEM Model on behalf of Cheshire, Halton and Warrington partners. Following the last model update (summer 2012), the CHWEM's results are now consistent with Cambridge Econometrics' (the model supplier) UK Regional Forecast, as published on Cambridge's Knowledge Base website in June 2012. The current Forecasts therefore take account of the 2008-9 UK (and global) recession and the (temporary) resumption of the recession in 2011-12

xvi CHWEM sectors and land use classes are based on SIC2003 classification codes

xvii Extrapolations based on other periods, such as 2015-2025 and 2011-25, were tested, but these generated less plausible results for 2026-2030

CHWEM data, are 'policy off' forecasts. Likewise, the employee forecasts and employment land forecasts do not take account of any local, unofficial economic intelligence.

8.19 The table below summarises the forecast change in employment growth across all sectors in the Borough 2010-2025 (2025 is the final year for which the CHWEM model produces forecasts)^(xviii).

Table 8.2 total employment growth (in 000s) 2010-30 (FTE equivalent employees in the Borough)

Employment land use class	SIC (2003) code(s)	Industries covered	2010	2025
Non B use	01, 02, 05, 10-14, 40-41, 52, 55, 80, 85, 90-99	Agriculture, Mining, Quarrying, Electricity, Gas, Water, Retailing, Hotels & Catering, Education, Health & Social Work, Other Services	51.37	51.35
Industrial	15-37, 45	Manufacturing, Construction	21.10	19.73
Warehouse	50, 51, 60-64	Distribution, Transport & Communications	14.83	15.11
Office	65-67, 70-75	Financial Services, Business Services, Public Administration & Defence	34.06	42.06
		Total FTE employees	121.36	128.25

8.20 This suggests employment in the Borough would increase approximately 5.7% 2010-2025, however this percentage change varies by employment type. It should be noted that not all activities will require employment land. These figures are adjusted to take account of off-site working when calculating the future potential land requirements below.

Employment Land Forecast based on CHWEM

8.21 Table 8.1-8.2 below provides a summary of the employment land forecasts to 2030.

xviii Source: Projections from the 2012 Cheshire, Halton & Warrington Econometric Model (CHWEM) update. Projections were obtained using Cambridge Econometrics /IER LEFM software. The CHWEM is due to be updated again autumn 2013

Table 8.3 Summary of employment land forecasts by use class 2010-2030

Employment land use class	SIC (2003) code(s)	Industries covered	Gross Requirement - Land (hectares)					Net change Land (hectares) 2010-30
			2010	2015	2020	2025	2030	
Industrial	15-37, 45	Manufacturing, Construction	310.04	307.08	295.24	283.83	272.90	-37.14
Warehouse	50, 51, 60-64	Distribution, Transport & Communications	212.51	204.96	205.81	203.76	202.29	-10.22
Office	65-67, 70-75	Financial Services, Business Services, Public Administration & Defence	150.36	161.85	173.03	185.70	198.36	48.00
Total			672.92	673.88	674.07	673.29	673.56	0.64

8.22 Overall, forecasts indicate a continued decline in industrial/manufacturing across the Borough. The former Ellesmere Port and Vale Royal areas have the most marked decline in industrial land use across the Borough.

8.23 In terms of warehousing, forecasts suggest a decline at the start of the plan period. This then levels off and fluctuates at lower levels. This will result in less need for employment land for B8 uses. (xix)

8.24 Service sector employment requiring new office development is projected to increase year on year throughout the plan period. This suggests a need for new employment land to accommodate office development (up to 48ha). Chester is likely to have the greatest need for new office developments, supporting it's role as a sub-regional centre.

8.25 The BE Group Study (2009) recommended that a 50% buffer be applied to the resultant land requirements allow for margin and choice. This is identified in the table below:

Table 8.4 CHWEM Economic Forecasts for Land Need (applying 50% buffer)

Employment land use class	SIC (2003) code(s)	Industries covered	Land (Ha)	Ha land 50% buffer
Industrial	15-37, 45	Manufacturing, Construction	-37.14	-29.71

xix Note: for 'Warehouse' use class the figures may be skewed due to the adjustment for off site working. This scales down the figures for the expanding transport and communications sector but does not affect the distribution sector.

Employment land use class	SIC (2003) code(s)	Industries covered	Land (Ha)	Ha land 50% buffer
Warehouse	50, 51, 60-64	Distribution, Transport & Communications	-10.22	-8.18
Office	65-67, 70-75	Financial Services, Business Services, Public Administration & Defence	48.00	72.00

8.26 Although the CHWEM forecasts strong employment growth in some sectors, it predicts that this will be offset to a large degree by an employment decline in other sectors. Furthermore, those land use classes that require a lot of land per FTE employee (i.e. Industrial and warehouse) are those in which employment is predicted to decline or remain static, while the use class that requires much less land per FTE employee (offices) is expected to see employment growth. This explains the prediction that overall B use classes demand for employment land will grow at a slower rate than the number of FTE employees.

8.27 The forecasts suggest that the main need for future employment land will be for office uses, which could result in a need for up to 72ha land.

8.28 The forecasts highlight the changes likely in different sectors of the economy. It is impossible to predict the full impact of evolving technical change over the study period, therefore the analysis assumes plot ratios and densities are maintained throughout the plan period. In reality, the property market does not operate in this way. (e.g. The methodology factors in the inefficient use of land by factoring in different plot densities and applying a 50% buffer).

8.29 In practice, qualitative factors and policy aspirations may also influence the take up and development of employment land. The forecasts indicate that it is important to consider the type of employment land provision. As stated in Section 7, qualitative factors such as location, proximity to the strategic highway network, environmental setting and accessibility may make sites more attractive to the market. This was also evident in the property market research in Chapter 5 & 6. Likewise policy/regeneration initiatives can impact on the likelihood of sites coming forward for development in the future. The BE Group Study (2009) suggested that future 'service sector employment' could require light industrial premises rather than offices, as is generally assumed.

8.30 Employment land forecasts should be treated with caution for the reasons set out in paragraphs 8.31 and paragraph 8.19. It is considered that past trends for the historic take up of employment land provide a more useful method of predicting future employment land requirements. Alongside these, economic forecasts are a useful tool to identify the likely changes to employment sectors/employee jobs alongside housing/population growth, and consequently the type of employment land needed (e.g. Office/industrial/warehousing) during the plan period.

8.31 The introduction of Government changes to permitted development rights, allowing for change of use from offices to residential, may also have a bearing albeit probably limited on the availability of office premises and consequent demand.

Employment Land Demand Summary

8.32 The quantitative demand for future employment land has been considered through the analysis of historic take up and development of employment land and revised employment land forecasts using the CHWEM and other data assumptions.

8.33 There are a range of factors that have influenced the historic take up and development of employment land. As the development of employment land is typically over long time periods, the historic analysis illustrates that the quantitative requirement to 2030 could range between 195ha and 388.45ha. However, taking a cautious approach to factoring in losses of employment land to other uses over recent years, 17ha/pa would appear a more reasonable level of take up. This would result in approximately 290ha of employment land for the remaining plan period to 2030. Applying a buffer to allow for range and choice, would result in a need for approximately 368.3ha employment land to 2030.

8.34 The employment land forecasts suggest that the Borough needs considerably less employment land than predicted by historic take up rates. The forecasts suggest a continued restructuring of the local economy, with traditional manufacturing industries/warehousing declining. The main sectors likely to experience economic growth could lead to an additional demand for offices, particularly in Chester. Demand for non-traditional industries (not B uses), may require different approach to employment land in future.

8.35 Economic forecasts should be treated with caution for the reasons outlined above. Whilst they provide a general indication of trends and changes within and between sectors, historic employment land take up rates are considered a more useful indication of the likely demand for future employment land. Historic completions take account of land availability, policy and regeneration initiatives and recognise that the development of employment land is typically over long time periods and are more relevant to inform emerging planning policies.

8.36 It is likely that qualitative factors such as location, proximity to the strategic highway network, environmental setting and accessibility will become increasingly important considerations in the future identification and allocation of employment land.

Future Employment Land Requirements

8.37 Different models have been used to forecast the quantity of employment land that could be required through the Plan period. As above, historic take up is considered a useful indication of what gross amount of employment land is likely to be needed. These projected land needs should be compared against the Borough's realistic employment land supply (as identified in Chapter 7) to highlight whether there is a need to identify new employment sites through the Local Plan.

8.38 Table 8.5 below provides a summary of employment land need (based on historic take up for the former Borough/District areas^(xx)) when compared against the Borough's realistic employment land supply.

Table 8.5 Employment Land Need Summary

Area	Average Historic Take Up (ha/annum)	Requirement to 2030	Land requirement with 27% Buffer	Realistic Employment Land Supply (Ha) April 2013	Additional land Requirement (historic take up)	Additional Land Requirement (27% buffer)
Chester	5.69	96.73	122.85	38.12	58.60	84.72
Ellesmere Port	7.78	132.26	167.97	200.98	-68.72	-33.01
Vale Royal	9.38	159.46	202.51	76.59	82.87	125.92
Total	22.85	388.45	493.33	315.70	72.75	177.63

8.39 As the data is based on historic take up, the figures in the table above provide an indication of gross employment land requirements to 2030. This suggests that Borough wide, additional new employment land allocations could be required within the range of 72.75ha-177.63ha.

8.40 The data needs to be considered alongside the economic forecasts which indicate a direction of travel for the economy. The forecasts suggest that there will be a shift from manufacturing requiring larger amounts of land, to more service based employment. Forecasts suggest that new office growth would be around the Chester area, given that it is a sub regional centre. Section 3 identified that regeneration initiatives are looking to increase the provision of modern large scale office floorspace within the city at the Chester Business District. Given the central location and type of employment land in Chester, this will require less land take and be of a higher density. There may be a need for some additional land to accommodate industrial uses (however, this will be dependant on the delivery of the Bumpers Lane site).

8.41 It has been already identified that the majority of the employment land supply is in Ellesmere Port and primarily for industrial or warehousing/distribution use. Table 8.5 illustrates that the area is already oversupplied. However, given the proximity to the motorway network and recent successes in attracting inward investment, there is market demand for employment use in this area. There is therefore no need to deallocate land through Local Plan (part 1). Further review may be required through Local Plan (part 2), particularly in relation to land availability in Stanlow.

8.42 Table 8.5 suggests that the former Vale Royal area, covering the towns of Northwich and Winsford, may have an under-provision of employment land for the plan period. It is these areas that are potential to require new employment land allocations. There is a good current supply of employment land in both Northwich and Winsford for a mix of office and industrial uses. Future opportunities could be for

xx Note: As this relies on historic data from the former local authorities, unfortunately it is not possible to analyse take up by the spatial areas of Chester, Ellesmere Port, Northwich, Winsford and the rural area.

warehousing and distribution given proximity to the M6 in the east of the Borough. It is therefore recommended that new employment land allocations are identified through the Local Plan process to meet likely future demands.

8.43 In the rural area the employment land supply is unevenly distributed. The main sites are in the former Chester area or at Clayhill Industrial Estate in Neston. There are examples of successful rural business parks and industrial estates, including Hampton Heath, Chowley Oak and Monument Farm. These business parks cater mainly for the need the growth and expansion of local businesses, some tied to the rural economy (i.e. Agricultural products). The need for additional employment land in the rural area is likely to be in line with the findings of the 2009 Employment Land Study. The need for additional employment land is likely to be for 2-3ha around specific rural settlements such as Malpas, Tarporley, Helsby and Frodsham, or as extensions to existing sites. Any employment development would need to be compatible with other local plan designations in the rural area so is likely to be limited to settlements outside the Green Belt. Therefore in total the additional need for the rural area would be approximately 10ha. Property availability for employment use, rather than land supply, is important in the rural area.

8.44 The future of existing large scale employment sites in the rural area should be closely monitored e.g. Capenhurst, to determine whether there is any suitable land available for redevelopment and additional employment use.

8.45 Table 8.6 summarises the likely need for additional employment land during the Local Plan period to 2030.

Table 8.6 Summary of future employment land requirements by spatial area

Area	Employment Land Requirement	Commentary
Chester	No new employment land allocations required.	Future development of employment land is likely to be high density. This will require less land, but could provide significant levels of employment (primarily office floorspace). The need for new industrial land should be considered in the context of the Bumpers Lane allocation.
Ellesmere Port	No new employment land allocations required.	<p>Large employment land resource.</p> <p>Need further understanding of employment land availability for potential redevelopment in Stanlow.</p> <p>Support regeneration initiatives to redevelop former vacant employment sites.</p> <p>Location close to the motorway network, Manchester Ship Canal and rail facilities means the area is highly attractive for new inward investment.</p> <p>Major employers (e.g. Vauxhall, Quinn, Essar) located in the area. These sites should be safeguarded and any opportunities for further growth of related industries or expansion encouraged.</p>

Area	Employment Land Requirement	Commentary
		The proposed development of Ince Resource Recovery Park has the potential for significant economic benefits, although presently the majority of the site is for non-B use class development.
Northwich	In the range of 20-40ha	<p>There is a need for a successor to Gadbrook Business Park.</p> <p>Land requirement increased from previous study as this takes account of the loss of employment land at Lostock Triangle to alternative uses.</p> <p>A new industrial estate as a successor to Denton Drive may be required for long term opportunities.</p> <p>Proximity to the M6 in the east of the Borough could result in demand for warehousing/distribution use.</p>
Winsford	In the range of 20-40ha	<p>There is a need for successor schemes to Woodford and Winsford Industrial Estates.</p> <p>Provide for a mix of employment types (office, industrial and potentially warehousing).</p>
Rural	Approximately 10ha	<p>Need to provide a minimum of 2-3ha employment land in or adjacent to main rural settlements and/or for the expansion of existing employment sites.</p> <p>Need to monitor the use of the former BICC site (3.5ha part).</p>

8.46 The recommendations for employment land requirements through the Local Plan period take account of the realistic employment land supply (April 2013). As in previous sections it is identified that further land could be lost from the employment portfolio as a worst case. Therefore the identification of future employment land requirements will be done through the Local Plan process. There is a difficulty of identifying a specific requirement, as this is dependant on range of factors and policy judgement needed in line with other growth and regeneration priorities taking account of other policy and land requirements (e.g. Housing, retail etc). There remains a general need to provide for a range of employment sites by type, size and location.

9 Identifying new employment sites

9.1 The Study has reviewed the existing property market trends, availability of existing office/industrial premises, the current employment land supply and the likely demand for new employment sites. A quantitative and qualitative review of existing undeveloped employment land/sites has been undertaken in Chapter 7. It has identified sites that are likely to be lost to other uses, or are unlikely to come forward for employment development in the future. The final stage of the Study is to identify a new portfolio of sites, to ensure that the supply of employment land in the Borough responds well to the demands of existing and new businesses for the Local Plan period to 2030.

9.2 The following stages have been undertaken in identifying potential new employment sites for the Local Plan period;

1. Consultation on the Draft Employment Land Study
2. Identification and assessment of additional employment sites

9.3 Following these stages, recommendations are made for Cheshire West and Chester Council's emerging planning policy.

Consultation on the Draft Employment Land Study

9.4 A Draft Employment Land Study Update was consulted upon December 2012- February 2013. The consultation included landowners, agents, developers, neighbouring authorities and other statutory and non-statutory organisations with an interest in the future economic development of the Borough. Government guidance on producing Employment Land Reviews^(xxi) recognises the importance of involving key stakeholders to understand private sector aspirations and market realities. The deliverability of employment sites is an important consideration within the Study, alongside other policy objectives. Consultation on the Draft Employment Land Study (and the portfolio of sites contained within it) is critical to the assessment of future employment land requirements.

9.5 The National Planning Policy Framework requires co-operation with neighbouring authorities on strategic priorities, included the new jobs needed in an area and the need for employment land. Consequently, neighbouring authorities, other partners (i.e. the Local Enterprise Partnership) and internal Cheshire West and Chester Officers from Economic Development and Regeneration teams were also consulted on the draft findings and invited to comment.

9.6 The main objectives of the consultation were;

- To review and comment on the the data and analysis of the current property market, employment land provision and likely future demand;
- To seek views on detailed site proformas and the forecast deliverability of existing employment sites;

- To identify any potential new sites for consideration through the preparation of the Local Plan (see below);
- To enhance the robustness of the study to inform the preparation of future planning policies.

9.7 A full list of consultees on the Draft Employment Land Study Update and for the call for sites is included as Appendix H. A copy of the consultation comments received, and how this has informed the final version of the Study, is available as a separate technical appendix to the this report. The final version of the Employment Land Study Update 2013 has been amended to take account of comments received where necessary.

9.8 It should be noted that the Draft version of the report included data on existing sites to a base date of 1st April 2012. The final version of the report takes account of the most recent information, to a base date of 1st April 2013.

Identification and assessment of additional sites

9.9 A 'call for sites' exercise was undertaken alongside the consultation on the Draft Employment Land Study Update. This took place between 7th January 2013-18th February 2013, and was done alongside the SHLAA review. A standard form was used for the site submissions to allow for consistency across the two studies. Following consultation with the Council's Regeneration Officers, additional sites being delivered through the Council's regeneration strategies were identified.

9.10 The Methodology for assessing new sites is detailed in Appendix I. Sites have been assessed in quantitative and qualitative terms, in line with the existing sites in the Employment Land Supply.

Conclusions of new site assessments

9.11 The new sites put forward for consideration in the Employment Land Review are included in Appendix I.

9.12 In quantitative terms, 32 sites were submitted for potential employment development either alone, or as part of a wider mixed use scheme. The assessment has considered the suitability of the sites for employment development, taking account of any planning constraints on the site or key policy designations such as Green Belt. The Council's emerging Local Plan strategy is only considering a review of Green Belt boundaries around Chester for residential use. Therefore, any sites located within the Green Belt were immediately discounted from the assessment.

9.13 The table below summarises the qualitative site scoring for the sites that have been submitted for consideration through the Employment Land Review (excluding discounted sites):

Table 9.1 Qualitative assessment of potential new employment sites

Site Ref	Site Name	Spatial Area	Total	Market Led Total	General Use
CHC/0018/E	Chester Business Quarter	Chester	78	32	Office

Site Ref	Site Name	Spatial Area	Total	Market Led Total	General Use
NET/0007/E	Surplus land at Vauxhall Plant	Ellesmere Port	52	31	Office / Industrial
EPT/0008/E	New Bridge Road, Ellesmere Port	Ellesmere Port	79	33	Office / Industrial
SHA/0008/E	Longwood, Northwich	Northwich	62	31	Industrial / Distribution
WIC/0017/E	Land at Leicester Street, Northwich	Northwich	40	16	Office / Industrial
WIR/0010/E	Land to the south of Gadbrook Park	Northwich	40	19	Office / Industrial
DAM/0001/E	Land to south west of Gadbrook Park	Northwich	56	28	Office / Industrial
FAR/0006/E	Land at Monument Place, Farndon	Rural	52	7	Office / Industrial
MAL/0010/E	Land to rear Hampton Industrial Estate	Rural	66	21	Industrial
TAT/0007/E	Land to the north of Chowley Oak Business Park	Rural	45	14	Office / Industrial
SHA/0009/E	Land off Holmes Chapel Road, Middlewich	Rural	56	35	Office / Industrial
WOV/0009/E	Agricultural Accommodation Land, Littler Lane	Winsford	52	29	Industrial
WIW/0014/E	Extension to Winsford 1-5 Industrial Estate	Winsford	64	29	Industrial

9.14 It is noted from the above that 13 of the sites submitted via the 'call for sites' exercise could be suitable for employment development. These will require further detailed assessment as part of the preparation of the Local Plan and will be the subject to Sustainability Appraisal. The sites are widely distributed across the Borough and are capable of meeting both office and industrial needs. The highest scoring sites are New Bridge Road, Ellesmere Port and Chester Business Quarter (part of these areas already have planning permission for some employment use). The sites that score most favourably under the market-led score have prominent locations in close proximity to the motorway and highway network, have a positive environmental setting and are capable of sub-division for a number of potential occupiers.

Emerging Local Plan policy

9.15 The Employment Land Study Update provides evidence to inform the Council's emerging planning policies. The Council is intending to produce the following plans that will ultimately replace the adopted former District Local Plans:

- The emerging Local Plan (Part One) Strategic Policies with a target adoption date of summer 2014;
- Local Plan (Part Two) Land Allocations and Detailed Policies will follow on from the adoption of the Local Plan (Part One), providing further allocations for housing and employment, where necessary. It is anticipated that the Local Plan (Part Two) would be adopted in 2015.

- There will be a close relationship between neighbourhood plans and the proposed borough-wide Site Allocations and Development Management Policies Plan. Allocations and locally specific development management policy may be forthcoming through the individual neighbourhood plans which will require careful co-ordination with the borough-wide plans.
- Supplementary Planning Documents may also be prepared which are either topic or site based.

9.16 It is important to note that policies in the extant Local Plans will continue to be saved, where they are consistent with the National Planning Policy Framework, until they are replaced by policies in the Local Plan (Part Two) Land Allocations and Detailed Policies.

Site recommendations for emerging policy

9.17 Chapter 7 reviewed the existing employment land supply. Chapter 8 reviewed the likely demand for new employment development within the Local Plan period. It was identified that there is a need for 290-368ha of employment land to 2030, which will include a mix of existing sites within the employment land portfolio, and new sites to be identified through the Local Plan to meet employment demand in the Plan period.

9.18 The table in Appendix J summarises the suitability of these potential sites to meet this identified need for additional employment land. A recommendation is made for the sites in relation to emerging planning policies;

- It identifies those sites that are key employment locations and important in delivering the overarching growth strategy for the Borough. These should be considered in the emerging Local Plan (Part One) policy.
- It identifies those sites that should be considered further through Local Plan (Part Two) Land Allocations and Detailed Policies
- It identifies those sites that are likely to be considered in emerging Neighbourhood Plans.

9.19 It should be noted that further assessments of the additional sites will be required to ensure that they are in line with the policy and sustainability objectives of the Council, and to identify if there are any further constraints on specific sites.

9.20 Appendix J also includes a summary of the existing employment land supply and recommendations for the Council when preparing future planning policies in the Local Plan. It is based on the findings on employment land supply from Chapter 7. This data should be considered alongside other evidence base studies, including the Strategic Housing Land Availability Assessment. This data should be regularly reviewed through the Council's Annual Monitoring Reports and in the context of emerging planning policy either through the Local Plan or Neighbourhood Plans.

Summary

9.21 Following consultation on the Draft Employment Land Review, various sites were submitted to the Council for consideration for future employment use in emerging Local Plan policies. These sites have been assessed in quantitative and qualitative terms in line with the assessment of the existing employment land supply.

9.22 The following sites are identified as being suitable for future employment use and should be considered/assessed further through Local Plan policies (either part one or part two, as appropriate):

- Chester Business Quarter (CHC/0018/E)
- Surplus land at Vauxhall Plant (Hooton Park) (NET/0007/E)
- Lostock Longwood, Northwich (SHA/0008/E)
- Land off Holmes Chapel Road, Middlewich (SHA/0009/E)
- Extension to Winsford Industrial Estate (WIW/0014/E)
- Agricultural land, Littler Lane Winsford (potential extension to Woodford Park) (WOV/0009/E)
- Land to the south and west of Gadbrook Park (DAM/0001/E)
- Land at Leicester St, Northwich (WIC/0017/E)
- Land to the South of Gadbrook Park, Northwich (WIR/0010/E)
- Land at Monument Place, Farndon (FAR/0006/E)
- Land to the rear of Hampton Heath Industrial Estate (MAL/0010/E)
- Land to the north of Chowley Oak (TAT/0007/E)
- Agricultural land, Littler Lane, Winsford (potential extension to Woodford Park) (WOV/0009/E)

9.23 The Council is required under national planning policy to review the employment land portfolio to ensure that it remains fit for purpose and capable of meeting future economic development needs. The existing employment land supply has been reviewed to ensure that there is a reasonable prospect of these sites being developed for employment use during the plan period. Appendix J also reviews existing sites within the employment land supply and makes recommendations on their suitability to meet economic needs during the plan period.

10 Conclusions

10.1 The public sector can facilitate economic growth by enabling an appropriate range of sites and premises for commercial development. A balanced employment land portfolio is required to stimulate local company growth, accommodate inward investment and emerging industries and allow for indigenous business growth and development.

10.2 Since the previous employment land study in 2009, there have been significant changes to the planning policy framework at national, regional and local levels. A National Planning Policy Framework has been introduced which sets out the Government's planning policies for England and how these should be applied. Central to the planning system is the need to contribute towards the achievement of sustainable development.

Local Strategies/Initiatives

10.3 At the local level, a significant amount of work has been undertaken in Cheshire West and Chester to identify the future regeneration needs and priorities in the Borough. Work is ongoing to produce an economic growth strategy for the Council and other public sector partners. The Local Enterprise Partnership Business Plan sets out clear ambitions for the future growth and development of the sub-region. The analysis has considered the range and type of employment land provision in neighbouring areas such as; Flintshire, Wrexham, Cheshire East, Wirral, Warrington and Shropshire to determine what land / sites are available within the wider sub-region.

Property Market

10.4 It has been identified that there is significant headroom across the Borough which is likely to absorb demand in the short term. This is particularly true of the office market in Chester, however this varies by size and quality. The historic nature of the city centre means it lacks centrally located modern large scale offices. The only area where there appears to be scope for potential supply constraints is for modern premises catering for distributions-type industries, particularly in the Ellesmere Port area where demand has remained throughout the downturn, and in 2012 increased sharply. The recent 2013 Property Market Report supports these findings. It identifies an absence of modern office floorspace and it tends to be out of town business parks providing this type of offer. It also highlights an increase in industrial transactions in the Ellesmere Port area.

10.5 In Chester, the office market has attracted a significant number of enquiries for premises under 250 sq ft which potentially indicates either the downsizing of businesses or the rise in the creation of starter businesses. Nevertheless, it suggests that there may be a lack of supply in this type of offer. Overall, higher levels of floorspace are being marketed, reflecting the impact of the recession and the impact that empty rates has had for landlords. However, within Ellesmere Port there does appear to be demand for land, particularly that owned by the Local Authority. This is likely to be the result of wider uncertainty in the market, and the greater certainty and flexibility offered by Local Authority landlords. In addition, the 'policy on' position of actively attracting additional occupiers to the local market may have a positive impact on take-up, above and beyond economic projections.

Business Requirements

10.6 As a result of significant supply, office rents are relatively static and take up is low. The amount of headroom means that there is little need for land, and although some demand for office space remains speculative build has not occurred for a number of years.

10.7 Empty rates are having a significant impact on industrial rents, bringing them down to a point where landlords can attract an occupier and make marginally more income than it would cost to retain an empty building. Ellesmere Port remains the most popular location for attracting industrial occupiers, whilst Winsford remains comparatively self-contained. There is plenty of churn in stock as occupiers look for shorter leases, and most opt for second hand stock. More positively, deals are increasing slightly and there is evidence that the distribution and logistics sectors are continuing to perform well in the Ellesmere Port area, particularly where the council are using their own assets and land to actively attract occupiers.

10.8 Occupiers and Employers have reported few intentions to expand, although there are some cases where this will occur. Despite this, many are looking to invest in their current business and increase the efficiencies of their landholdings, which may provide further investment opportunities.

Employment Land Supply

10.9 A review of the borough wide portfolio of employment land has been undertaken. There is a headline amount of 432.15ha of employment land. However, this reduces to a realistic supply of 315.70ha when extant permissions for alternative uses are discounted. As a worst case scenario, there could be a minimum of 221.88ha of employment land remaining.

10.10 The key findings suggest there is a limited amount of supply in the Chester area. The majority of the employment land resource is located in the Ellesmere Port area, although this supply is complex. Northwich has a fairly balanced supply of land, by type, location and quality. The supply in Winsford is primarily industrial. In the rural area, the land supply is more limited and opportunities for small scale rural employment development are limited.

10.11 Borough wide, the majority of the employment land resource is available in the short to medium term. A significant amount of the realistic supply is identified for a mix of B-class uses. This allows for a flexible supply of land to meet a range of business requirements. The majority of the sites making up the realistic supply are likely to be serviced.

10.12 Qualitative factors are likely to be important in attracting future economic investment and supporting growth. The analysis shows there are a good range of sites across the Borough, which would be suitable for a range of market segments. However, opportunities for new research and technology parks, high quality business parks, incubator/SME cluster sites or warehousing/distribution are more limited. The suitability of sites to different market segments also varies by area within the Borough, depending on the role and function of those settlements.

Employment Land Demand

10.13 Historic take up and development of employment land suggests there would be a need for 290ha of employment land for the remaining plan period to 2030. Applying a buffer to allow for range and choice, would result in a need for approximately 368ha employment land to 2030.

10.14 Economic forecasts suggest lower levels of land may be required over the next 20 years. The forecasts suggest a continued restructuring of the local economy, with traditional manufacturing industries/warehousing declining. The main sectors likely to experience economic growth could lead to an additional demand for offices. Demand for non-traditional industries, may require different approach to employment land in future.

10.15 It is likely that qualitative factors such as location, proximity to the strategic highway network, environmental setting and accessibility will continue to be important considerations in the future identification and allocation of employment land.

10.16 Future service sector growth will mean that the regeneration and growth of the Borough's main urban areas will be a fundamental driver of both the Borough's and the sub-regional economy. Economic forecasts suggest future growth will require office development, which will need to meet modern business requirements. The historic and architectural importance of buildings within Chester city centre may present additional challenges. Qualitative factors, such as environmental setting and proximity to transport infrastructure may make sites attractive to private sector investors.

10.17 There remains a need for some town, city centre and edge of centre industrial development. There is an opportunity to retain and enhance existing areas which serve this local need. Likewise small scale opportunities should be provided in rural areas.

Summary

10.18 The following table summarises the main issues around employment land supply and demand Borough wide and by each spatial area;

Table 10.1 Summary of employment supply and demand by Spatial area

Area	Realistic Supply (Ha)	Commentary
Chester	13.30	<ul style="list-style-type: none"> Chester Business Park has been an office flagship location for the city but is almost fully developed. The Chester Central Business Quarter is a significant regeneration initiative which will provide new, sustainably located modern office space in the city. Chester West and Sealand Industrial estate are established general industrial / business areas to the west of the city. The undeveloped Bumpers Lane employment allocation is adjacent to this area and is severely constrained. The

Area	Realistic Supply (Ha)	Commentary
		<p>development of this site would require some form of subsidy under current market conditions. It is also dependent on the proposed Chester Western Relief Road. It is only likely to be available in the long term therefore is excluded from the realistic supply figure. However, the site remains important for Chester given the limited availability of industrial land in the city.</p> <ul style="list-style-type: none"> • There is significant headroom of office space in the city, particularly for smaller office space. There is also a lack of space for large modern office schemes above 1000m2 floorspace. • There also appears to be demand for smaller premises/units of less than 250sqft, to cater for new start up businesses or companies wishing to downsize.
Ellesmere Port	182.26	<ul style="list-style-type: none"> • Continued demand for employment land, despite the recession. Remains an attractive industrial location. • Significant supply of employment land and premises, although this is complex. Sites meet a range of property segments covering both general industrial and specialised sectors. • Some additional opportunities for future employment development on brownfield sites, identified in Strategic Regeneration Framework not currently identified in the supply (i.e. New Bridge Road, BP Castrol site). • Limited office market in the area, with the exception of sites at Cheshire Oaks. However, some site have been developed for alternative uses (car dealerships, retail and leisure). • Some of the Borough's major employers are located in the area; Essar, GM Vauxhall etc. There is a considerable land resource within Stanlow. • Land/sites in the area are highly attractive for future inward investment, given the proximity to strategic highway network.
Northwich	48.27	<ul style="list-style-type: none"> • Town centre sites remain suitable for new employment development. • Mainly an office location, with high quality sites at Gadbrook Park. • Land at Lostock Triangle was previously identified as a flagship office location, however this land is likely to be developed for alternative use. The remaining plot is small

Area	Realistic Supply (Ha)	Commentary
		<p>scale, limiting the amount of realistic employment land available for new office use.</p> <ul style="list-style-type: none"> • Undeveloped Town centre sites remain capable of providing new office space. • There are a range of industrial sites to meet a local need. • Proximity to the M6 and motorway network in the east may provide future economic development opportunities for the warehousing and distribution sector.
Winsford	47.13	<ul style="list-style-type: none"> • Most of the land resource is for industrial uses. • The main employment areas are Winsford Industrial Estate and Woodford Park. • Winsford town centre is also identified as an existing key employment area. • Proximity to the M6 and motorway network in the east may provide future economic development opportunities.
Rural	24.74	<ul style="list-style-type: none"> • The supply is dominated by land at Capenhurst for specific occupiers. • There is limited land available for employment development, aside from Chowley Oak and Hampton Heath.
Borough wide total:	315.70	<ul style="list-style-type: none"> • The Borough wide supply is flexible, to provide for a range of sizes and types of business needs in locations across the Borough. • The portfolio is suitable for a wide range of market segments. • Gaps in the portfolio are identified for potential research and development, high quality business parks and cluster sites and warehousing/distribution. • The majority of the employment land supply is available in the short to medium term. New sites will need to be identified through emerging Local Plan policy to meet needs in the medium to long term.

11 Recommendations

11.1 This section provides recommendations arising from the findings of the Employment Land Study Update (2012). Guidance on undertaking Employment Land Reviews (2005) identifies 3 key stages in any approach to the future allocation of employment land;

1. Taking stock of the existing situation
2. Creating a picture of future requirements
3. Identifying a new portfolio of sites

11.2 In reality this is an iterative process, linked to the overall Local Plan preparation process. The stages undertaken to date have examined specific aspects of the existing employment land situation (stage 1) and identifying future employment land requirements (stage 2).

11.3 The recommendations emerging from this Draft Employment Land Study Update (2012) are as follows:

Property Market

11.4 As the economy is projected to remain stagnant for some time to come, Cheshire West and Chester must take a proactive approach in both monitoring and marketing employment land. There will be pressure for loss of some land for housing, but employment land must be assessed strategically before any view can be taken on which land to preserve and which to release. The market can change suddenly, and somewhat unexpectedly, as demonstrated by the 150% increase in industrial transactions in Ellesmere Port between 2011 and 2012. Moving forwards, it is important to monitor the headroom for different types of employment floorspace within areas of the Borough so that Cheshire West and Chester can act to increase or adjust supply to suit demand and attract new investment. The recent Government change of permitted development rights for office use could impact on the availability of vacant office premises in the future and should be monitored. It is also important to maintain an active approach towards marketing existing floorspace and potential development land, with a view towards bucking downward trends in both rental levels and employment land take-up. Cheshire West and Chester may also look towards providing more accommodation as landlords, to support small and starter businesses through a difficult economic period in order to place itself in a strong position once recovery begins.

Business Needs

11.5 Neighbouring area analysis has highlighted that there are nearby Enterprise Zone designations which could take some trade away from the Borough. It will be important to counteract this by ensuring that Cheshire West and Chester invests in its infrastructure and continues to supply quality land and buildings at competitive rates to attract footloose businesses, whilst ensuring that those growing at grass-roots levels are catered for as the economy begins to recover. Going forward, the Council will continue to work proactively to attract inward investment and support indigenous companies to grow.

11.6 Based on the analysis of the existing property market, employment land supply and demand to date, the following recommendations can be drawn for the Borough and each of the spatial areas within it for the employment land needs to 2030;

Table 11.1 Recommendations by Spatial Area

Area	Recommendation
Borough wide	<ul style="list-style-type: none"> • Based on past trends in take up of employment land, quantitative analysis suggests that a minimum portfolio of 290-368ha of employment land should be provided to 2030. • The portfolio should be flexible to meet a range of types and sizes of business needs, in suitable locations Borough wide. • Economic forecasts suggest increased demand for offices, particularly in the Chester area. • Current property market report indicates that modern office requirements are being met by out of town developments. Regeneration initiatives seek to stimulate new demand for office development in central, sustainably located sites in close proximity to different modes of transport. • There is a need to meet demand for the warehousing, distribution and logistics sector, identifying suitable sites accessible to key transport networks. • The Borough has a good stock of existing office and industrial sites which should be retained where they continue suitable for employment use. • There are some major employers present in the Borough which will continue to have an important role for the local and sub-regional economy. These employment areas should be safeguarded. Expansion land remains an important part of the employment land portfolio.
Chester	<ul style="list-style-type: none"> • Employment land and premises for for industrial uses (such as Chester West Business Park) should be retained and protected from alternative forms of development, given the constraints to future development on the Bumpers Lane site. Scope for qualitative improvements to these existing areas should be explored. • Given the shortage of industrial land available in the Chester area, the scope for bringing forward employment development (including funding mechanisms) on the Bumpers Lane employment allocation should be explored further. The site should be retained as part of the employment land portfolio as it remains important for long term industrial needs for Chester and should be evaluated in the context of the future of the Chester Western Relief Road through the preparation of the Local Plan. • There is demand for smaller premises of less than 250sqft, for start up businesses and or companies wishing to downsize. • There should be continued support for city centre office development, recognising the role of Chester as a sub-regional centre. The Chester Central Business Quarter is an important regeneration initiative that could result in significant development of new office and commercial space in the city.

Area	Recommendation
	<ul style="list-style-type: none"> • Less land is required within the city centre as new office and commercial development will be higher density and have high plot ratios. • Chester Business Park, as a high quality business park of sub regional importance, should be safeguarded from alternative forms of development.
Ellesmere Port	<ul style="list-style-type: none"> • There is an extant planning permission for the development of a resource recovery park and energy from waste facility at Ince Park. This site is capable of delivering significant job creation and economic benefits for Ellesmere Port, the Borough and wider sub-region. The development of this site should be closely monitored in relation to the amount of B-class development that is likely to be delivered (current commitment is primarily for sui generis use class). There is an opportunity for future development to take account of the unique infrastructure provision in this location and scope for multi-modal transport (ports, rail, Manchester Ship Canal). • Long term the adjacent site at Kemira could offer additional employment opportunities in connection with the development of Ince Park and should be considered through the Council's emerging Local Plan (Part 2), in the context of the proposed development at Ince Park and land availability within Stanlow. • To review and identify any additional brownfield/employment land that may be available for future economic development. A better understanding of the sites within the Stanlow Special Policy Area to determine if there are any additional development sites available. • Additional work may be required to understand the barriers to delivery on some sites. • Further discussions should take place through the local plan process with major stakeholders in the Borough to understand their future business requirements, specifically GM Vauxhall and Peel land holdings. • Land at Hooton Park (Vauxhall) should be safeguarded for continued office, industrial and warehousing use. • Support should be given to the regeneration of the New Bridge Road area for future employment development. The allocation of this area specifically should be considered through the strategic policies of the local plan.
Northwich	<ul style="list-style-type: none"> • In the range of 20-40ha additional / new employment land allocations are required to support continued economic growth in the medium-long term. This may include the need for a new industrial estate as a successor to Wincham Industrial estate. This recognises the need to respond to market demand for sites close to the M6 in easily accessible locations. It also helps to diversify the offer beyond the increasing demand experienced elsewhere in the Borough. • The remaining land at Lostock Triangle and Gadbrook Park, identified as flagship locations, should be safeguarded from alternative forms of development. They have the opportunity to provide for future high quality office development for Northwich.

Area	Recommendation
	<ul style="list-style-type: none"> • The remaining sites allocated in the town centre for employment use should be retained as offering the potential for B-class development. The take up of these sites should be monitored. • There is potential demand for warehousing/distribution use given the location in the east of the Borough and proximity to the M6. A site at Lostock Longwood has been submitted for consideration as part of the Local Plan/Allocations Plan preparation. Consultation feedback identifies this site as being attractive to the market and capable of meeting the demand for this type of development. This should be subject to further consideration/assessment as part of the plan making process.
Winsford	<ul style="list-style-type: none"> • In the range of 20-40ha additional / new employment land allocations may be required to support continued economic growth in the medium-long term. • There may be a need for the further expansion of Winsford Industrial Estate, to meet local industrial needs. • The expansion of Woodford Park could provide a mix of office/industrial employment opportunities in the medium to long term.
Rural	<ul style="list-style-type: none"> • A minimum of approximately 10ha additional / new employment land allocations may be required to support continued economic growth in the medium-long term • This should allow for small scale expansion of existing employment sites within or on the edge of key rural settlements. • The continuation of employment development on major sites in rural areas (i.e. Capenhurst) should be supported. • Existing employment land/buildings in rural areas should be retained where they are economically viable for future employment development. This includes any opportunities that may arise from the re-use of rural buildings. • Develop a better understanding of the future needs for employment land/premises in the rural area, to update the findings of the Rural Workspace Study (BE Group 2009) • New allocations should be identified in the emerging Allocations/Development Management Plan and/or Neighbourhood Plans.

Other

11.7 The Council should continue to work closely with neighbouring authorities to understand the sub-regional economic trends and priorities, ensuring there is a balanced portfolio of employment land across the area. There should be continued engagement with the LEP on sub-regional priorities and to improve understanding of the deliverability of sub-regionally important employment sites. The implications of Enterprise Zone designations in neighbouring areas should be considered going forward.

11.8 The deliverability and any barriers to the development of sites should be considered through the Local Plan/Infrastructure Delivery Plan process. Where employment land/sites are identified as being sub-regionally important, or important in meeting a specific type/local need, these sites should be safeguarded from alternative forms of development.

11.9 Emerging Neighbourhood Plans should also be monitored in relation to any policies on the allocation/loss of employment land in local communities. It is recommended that the Council continues to monitor the the existing/emerging regeneration initiatives and the effect these would have on the existing/future portfolio of employment land.

11.10 Future economic growth may not necessarily require B-use class development. Job creation from other forms of commercial development should be considered in the Local Plan process, e.g. retail, leisure, waste, tourism uses. An important example of this is the proposed development at Ince Marshes for an energy facility and Resource Recovery Park. This could have a significant impact locally on generated wealth, jobs and economic benefits. However, given the nature of proposed uses (classed as sui generis rather than falling within the B use classes) on the site it has been excluded from the analysis of the 'realistic' employment land supply. Headline figures suggest a total economic impact of £316-463 million direct and indirect GVA during construction. A total economic impact of £78-134 million of direct and indirect GVA *per year* during the 25 year operation of the site. This could deliver between 1253-2350 direct jobs and 530-914 indirect and induced jobs. Further consideration should be given to these types of employment generating uses and their potential to contribute towards local economic development through the local plan process.

11.11 National planning policy recommends that Employment Land Reviews are carried out alongside the Strategic Housing Land Availability Assessment (SHLAA). This update report should be considered alongside the assessments made in the SHLAA when determining future housing and employment land allocations through the Local Plan.

11.12 The Borough's portfolio of employment land should be regularly reviewed and updated in 3 years time to ensure that it remains fit for purpose. Annual monitoring reports should continue to monitor the take up and development of employment land in the Borough. This includes carefully monitoring the loss of employment sites/premises to alternative uses, and the implications this would have on the overall employment land supply position.

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