



A strategic regeneration plan for Carmarthenshire 2015-2030 – Transformations

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The future



Carmarthenshire – a county with big ambitions – a county that strives to go places, is well-placed, well-connected and well-underway. A county that is bringing together the sum of its varied and distinctive parts to transform the overall economic, environmental, cultural and social well-being of Carmarthenshire.

Focus

It is with great pleasure and pride that I present this document to you.

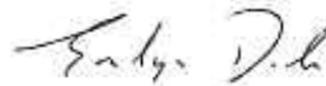
Carmarthenshire is a county that has seen unprecedented transformation in recent years and this document will highlight much of the excellent work that is currently underway in terms of regenerating the county and will showcase 6 key transformational projects that Carmarthenshire County Council and its strategic partners are intending to focus on over the next 15 years – this will create more than 5,000 new jobs and endeavour to create an economy within Carmarthenshire which is at 90% of the UK's average GVA level. Our economy is a component of the pioneering Swansea Bay City Region which has already and will undoubtedly offer new projects to benefit Carmarthenshire.

As of 2014, there were 78,700 people employed in Carmarthenshire translating to an employment rate of 67.9% (below both the UK and Wales average). Of this total number, only 31,300 were employed within the nine Welsh Government priority sectors.

The private sector supports 69% of the county's total employed population, emphasising the importance of enterprise and innovation to the overall prosperity and wellbeing of the county and its residents.

We are a diverse county in many ways, our towns and villages have unique features; our bilingualism strengthens and defines us; our business community operates across many key emerging growth sectors. Our tourism and leisure offering is inimitable and offers so much to residents and visitors alike. We offer strategic employment sites for business and employees to thrive. High levels of digital connectivity are now in place in Carmarthenshire for us to benefit from in both our home and work lives; and with more investment underway and planned within our transport infrastructure; our county is now extremely well connected.

I firmly believe Carmarthenshire has the right mix of elements to create the foundations of a strong and healthy economy for current and future generations. I hope this document makes you feel part of the big picture, allows you to share our ambition and go the extra mile with us.



Emlyn Dole
Leader of Carmarthenshire County Council



For illustrative purposes only



DEBENHAM'S

DEBENHAM'S

DEBENHAM'S





SECTION

01

On track

The regeneration of Carmarthenshire is well underway with many major developments coming to fruition in 2015. The economic landscape is evolving with Carmarthenshire's position in the new Swansea Bay City Region for which the strategy has been adopted by the Council; by 2030, Carmarthenshire will be a confident, ambitious and connected component of a European City Region.

Common purpose

Carmarthenshire's current and future developments are both ambitious and challenging; they cannot be achieved in isolation.

Our Partners in Carmarthenshire are vital to our collective vision and strategy. This common purpose and mutual aims allow all the parties to accelerate the outcome and to swell resources for the benefit of all. Two of the County's transformational regeneration projects are driven by excellent combined and concerted efforts with Carmarthenshire's burgeoning academia. The ability to work collaboratively with key stakeholders is a key feature of Carmarthenshire and its long term aspirations.

The right mix

Sectors, Sites, Seaside & Shwmae – The makeup of Carmarthenshire's economy is a mixture of elements all enhanced by strategic employment sites; businesses in varied sectors; a bilingual and connected economy that is unique and presents outstanding opportunities. Carmarthenshire has an offering for all, with a lifestyle, heritage and sense of place that is traditional, modern and welcoming.

Swansea Bay City Region – The 5 key aims

1/

Business growth, retention and specialisation:

- + Develop a more entrepreneurial culture across the region;
- + Encourage a more dynamic and sustainable business start-up market;
- + Provide tailored business advice and support for retention and growth;
- + Better support large employers across the region in both the public and private sectors;
- + Develop a first rate inward investment offer.

2/

To be skilled and ambitious for long-term success

- + Improve attainment and ambition in our lowest performing schools;
- + Ensure that Further and Higher Education provision is aligned to the needs of growth sectors;
- + Target individuals who are in work promoting awareness of up-skilling, progression and training opportunities;
- + Change the culture and help people to be more ambitious for their future.

3/

Maximising job creation for all

- + Support people to get back into work through a range of targeted support programmes;
- + Increase the level of new business starts including social enterprises;
- + Increase job opportunities by supporting employment growth in the region's businesses;
- + Improve opportunities for our children and young people.

4/

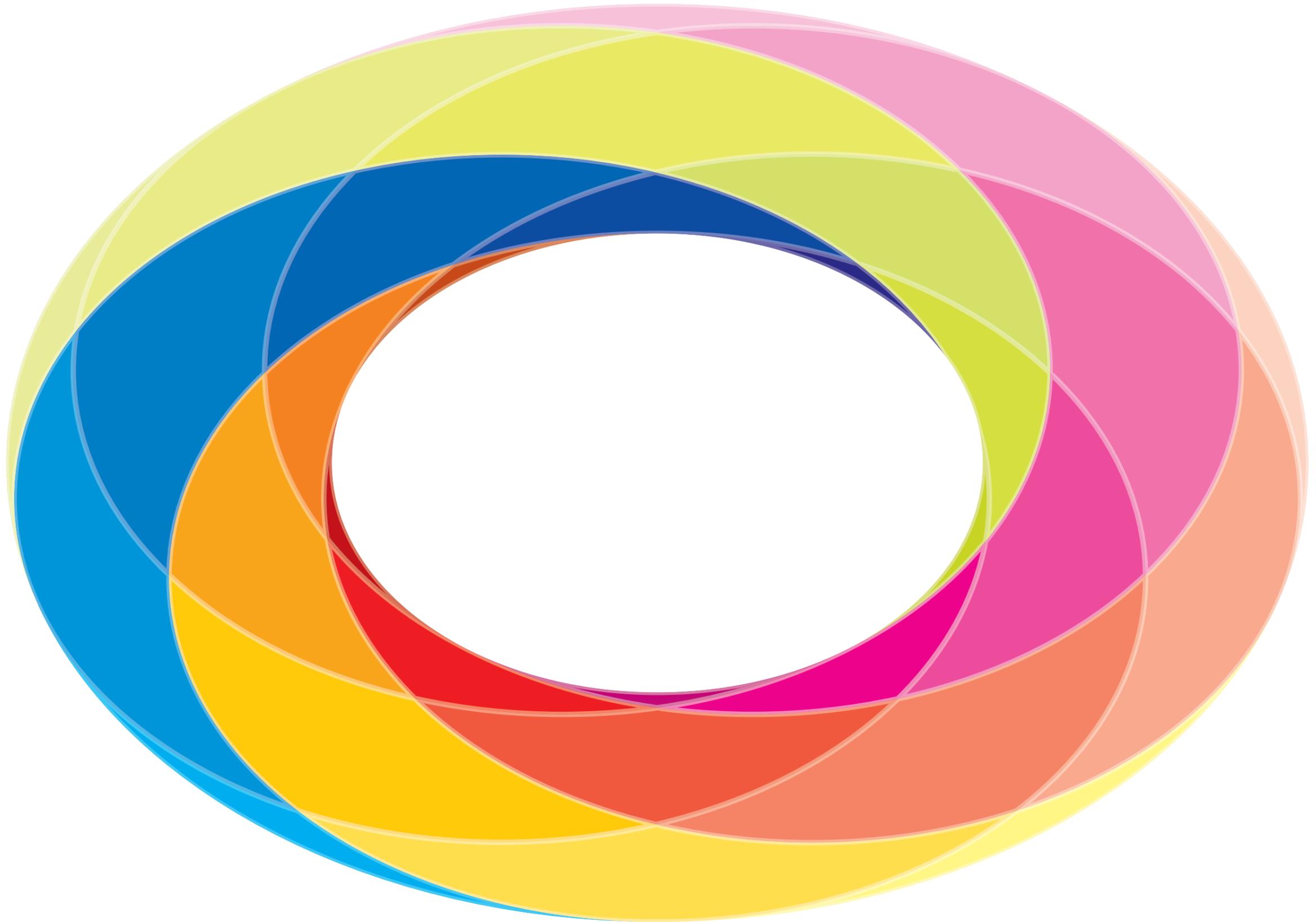
Knowledge economy and innovation

- + Develop a coherent long-term innovation strategy that is well aligned with EU thinking;
- + Maximise the long-term potential of Swansea University's new Science & Innovation Campus;
- + Adopt a strategic approach to nurturing new businesses through business incubation and innovation;
- + Better integrate and co-ordinate our R&D assets across the region;
- + Establish strong international connections and partnerships.

5/

Distinctive places and competitive infrastructures

- + Establish a coherent investor and visitor proposition;
- + Develop effective and strategic long-term spatial planning for growth;
- + Address strategic transport issues to unlock long-term growth;
- + Develop competitive Next Generation Broadband and 4G offers.



The pledge of partners

The University of Wales Trinity Saint David Group and Carmarthenshire County Council have signed an agreement to work together to benefit the county and its communities. In what is a novel approach to partnership working with the public sector, the pledge contains specific actions to be undertaken by both organisations with full accountability and transparency. Both agencies are members of the Carmarthenshire Local Service Board which serves to achieve a Carmarthenshire that enables people to live healthy and fulfilled lives by working together to build strong, bilingual and sustainable communities.

The pledge reflects a number of key areas which are priorities for both the council and the university in accordance with both the university's strategic plan and the council's desired outcomes and have identified the following pledge areas as worthy of specific joint commitments.

Sustainable development

The partners will commit to providing strong community leadership for sustainable development in Carmarthenshire.

Anti poverty, economic and community development

The partners will support cooperation between companies and institutions to develop initiatives designed to benefit economic development within Carmarthenshire and the broader city region. The regeneration of Carmarthen town is of strategic importance to both organisations. Meeting the skills challenge for the community will be an area of initial focus.

Skills and the labour market

The partners will cooperate to promote the development and deployment of a skilled workforce in key sectors to achieve greater levels of productivity.

Enterprise and innovation

The partners will foster the development of a knowledge based economy, widening the opportunities for research & development, leading to new product and process innovations within Carmarthenshire firms and organisations.

Sport, culture, tourism and heritage

The partners will encourage collaboration on key opportunities in relation to Sport, Culture & Heritage which raise Carmarthenshire's profile, nationally and globally, to new and existing audiences.

The signing of this pledge shows the importance of collaboration to both the University and the Council allowing Carmarthenshire to benefit from the University's wealth of experience and expertise in order to stimulate economic growth in the region and explore new opportunities linked to education and training, as well as recreation and tourism. Both parties already work closely together in many different areas but this is an opportunity for both organisations to work strategically on the transformational projects and to be of further benefit to Carmarthenshire.



Strategic regeneration sites

Delta Lakes

Delta Lakes is located immediately to the south of Llanelli adjoining the principal Coastal Link Road which is a gateway into the Carmarthenshire Coastal Belt. This 34 acre site lends itself to a mix of commercial and business development.

Overlooking the lake and parkland on one side and the coastline on the other, the aspect and location is particularly appealing. Considered to be Llanelli Waterside's most prestigious business park location there is an opportunity to develop a mixed use and modern business park to attract companies from key growth sectors such as the Life Sciences; Healthcare and Financial Services sectors. In total the potential exists to accommodate approximately 275,000 square feet of floor space. The site is also fully serviced with gas, electricity, water, mains drainage and communications.

Two storey contemporary office developments for single or multiple uses are also envisaged for Delta Lakes incorporating an 'office village' complex for smaller end-users. These office developments would naturally fit towards the coastal-facing front of the park offering future tenants high profile accommodation.

To the rear of Delta Lakes, facing the salt-water lake, are envisaged two plots to accommodate interest from the healthcare sectors. This has linkages with recent developments underway on adjacent developments. This part of the park is primed for the forecasted growth in the private healthcare industry and has sympathetic landscape, movement and ecology features appropriate for the sector.

The Beacon

Carmarthenshire is now home to The Beacon – established in November 2011; The Beacon is home to some of the top companies in Carmarthenshire. Managed in a unique partnership with the Welsh Government on the edge of Llanelli and just 5 minutes from Junction 48 of the M4, The Beacon is now one of the most sought after business locations in South Wales and has emerged with a distinctive style of its own. Not only does The Beacon provide top quality office space and high speed 100 mbs broadband connectivity, it also offers a business friendly and entrepreneurial environment for associate members; business incubation space and conferencing.

The Beacon also has a significant development land site for innovative and high profile developments to spin out from The Beacon and to attract key sector developments such as Advanced Manufacturing; Life Sciences; Professional and Commercial services or special projects. Home to some established commercial names such as Chromogenex and Treharne Engineering; The Beacon also accommodates Wales' next generation of business enterprise. New names all operate from The Beacon and are genuinely 'young' in their business lifecycle and commercial outlook – the next big and bright young things are emerging!

continued →



Strategic regeneration sites continued

Cross Hands Food Park

The Cross Hands Food Park is the first designated centre of excellence for food technology in the whole of Wales, is a joint venture between Carmarthenshire County Council and the Welsh Assembly Government, and is a genuine employment hotspot for the food industry in South Wales. Strategically located and within 5 minutes of the M4, it represents the heart of a vibrant food producing county with numerous high quality suppliers based nearby thus reducing food miles for production. The Food Park incorporating Incubator Food Production Units employs in excess of 1,000 people and is continually growing with further expansions by many of the current occupiers.

Recognised names such as Castell Howell Foods – Wales’ largest independent wholesaler; Dawn Group Cross Hands – operating in 200,000 square feet of space; Gower View Foods – one of the most respected food packaging companies in the UK and NR Evans – the dedicated food haulier all operate from the park with so many more niche producers in situ and more exciting projects on the way, Cross Hands Food Park offers everything the modern food producer needs to flourish.

The site is nearing maturity and is a pivotal economic component in the wider Cross Hands Growth Zone, with investment on the site in excess of £50m and rising, the Cross Hands Food Park has reinforced Carmarthenshire’s position as a first rate food production County.



Primary towns

Carmarthen Town Centre

The County town of Carmarthen is located on the River Towy in the heart of Carmarthenshire. The town is strategically located at the junction of the A48 and A40 and on the London to Fishguard rail link, the town functions as a gateway to West Wales. As the major administrative centre for Carmarthenshire, the town is both a major employer in the County and a regional retail centre serving a wide rural hinterland. It is also home to a major University Campus.

The town is also confirmed as one of three 'Growth Areas' alongside Ammanford/Cross Hands and Llanelli within the settlement hierarchy for Carmarthenshire. The town's regional retail role was reinforced in 2010 with the completion of the £75 million St Catherine's Walk development on the site of the old cattle market. Providing over 2,270 m² (245,000 sq ft.) of commercial space including an Apollo Cinema and a new 950 space multi-storey car park, the development has been anchored by a new Debenhams department store at the heart.

A recent analysis of Carmarthen town centre reported that Carmarthen presents a robust picture of good overall economic performance despite continued challenges in the wider regional and national commercial markets. The new town centre development emerged ahead of the global recession but still managed to retain occupier interest and has recently achieved full occupancy during some particularly turbulent times for national and local retailers alike. The new development has blended well with the rest of the town centre and presents a high quality physical environment which is proving attractive to shoppers and other visitors to Carmarthen. Carmarthen's transformation has led to the creation of the transformational Carmarthen West project which includes the exciting 'Yr Egin' development which will house S4C.

continued →

A48

A48: Strategically located

£75m

£75m: Spent on St Catherine's Walk

2,270

2,270: Square metres of commercial space

S4C

S4C: Heading to Carmarthen



Primary towns

continued

Llanelli Town Centre

Llanelli is a former industrial town which has seen considerable economic change over recent decades with the transformation of the Millennium Coastal Path, coupled with new housing development and related town centre investment. The town is anchored by a large Asda superstore at the heart of the St Elli Shopping Centre which opened in 1997 and remains an integral part of the pedestrianised Stepney Street and prime retail offer in the town centre.

Meanwhile the regeneration project at Llanelli's East Gate, adjoining Stepney Street provides a new leisure destination quarter comprising an Odeon Cinema with associated cafes, restaurants and bars and has over 14,000 square feet as well as 21,000 square feet of commercial offices. Llanelli Town Centre has also seen significant investment in its landmark civic buildings including the public library and Llanelly House which is now a fully refurbished Grade 1 listed building and is a triumph of community, archaeology, history, culture, building skills and faith in Llanelli's heritage.

Ammanford Town Centre

Ammanford is an important local settlement in South West Wales and fulfils an important role in providing services and facilities to its surrounding communities. The former mining town is the third largest settlement in Carmarthenshire and the town centre is relatively compact, located around the cross roads between the A474, A483 and the pedestrianised Quay Street. Perfectly placed at the foot of the dramatic Black Mountain; and the Towy and Amman valleys and served by the Heart of Wales line, the core town centre is anchored at one end by Co-Op food store and a large Wilkinson unit at the southern end of the town. A large Tesco store is also situated further to the south.

Ammanford offers a friendly visitor and shopping experience and has seen significant investment in its common areas such as the streetscapes; landscapes and shop frontage improvements. The town's heritage has never been more to the fore with the recent adoption of the 'Twrch y Trwyth' focusing on the town's rich legend of King Arthur hunting wild boar in the Amman Valley.

1997

1997: St Elli opened

14,000

14,000: Square feet at East Gate

1

1: Arthurian Legend

A483

A483: Perfectly placed



Vibrant market towns and valley growth zones

A key feature of Carmarthenshire's make-up is its splendid mix of vibrant market towns and recently identified valley growth zones.

There are 7 identified market towns in the County:

- + Llandovery
- + Llandeilo
- + Newcastle Emlyn
- + Llanybydder
- + St Clears
- + Whitland
- + Burry Port

The valley growth zones are identified as being around the Upper & Lower Amman Valley and the Upper, Central & Lower Gwendraeth Valley.

Much regeneration work has already been done in many of these areas in recent times enhancing the community and economic welfare of each; regeneration activities will be targeting derelict sites and turning redundant buildings into economic use. Employment sites within these areas will be targeted for improvement, in terms of physical redevelopment and business support initiatives to accelerate economic activity. Connectivity will be improved both physically and virtually by working with our key partners. It is essential to deliver the required growth ensuring that all times our heritage, visitor experience and environment are never compromised.

As a result of the work in the market towns and valley growth zones, outcomes such as lower commercial property vacancy rates and increased footfalls are generated. Public and private investment will be levered in, jobs will be created, people will be supported into work and poverty levels will be reduced.



Tourism, hospitality and leisure

The destination

**“A tourism product is what you buy –
a tourism experience is what you remember.”**

Carmarthenshire is widely known as one of the most welcoming, engaging and memorable locations to visit in Wales. It is recognised as a destination providing a wealth of quality experiences to the visitor ranging from world renowned gardens to family focused attractions and culturally diverse places of interest. People increasingly visit throughout the year to enjoy its rich calendar of events and festivals, warm and vibrant market towns, modern retail centres, clean beaches, dramatic coastal belt and its rolling countryside that attracts walkers and more active visitors. Its Leisure offering is as diverse as it is exciting! Carmarthenshire is proud to be a truly Welsh County and the language is much in evidence – an inspirational reminder to all of the values and traditions that the area stands for and continues to live by.

Tourism and Leisure are key components of Carmarthenshire’s economy and a major source of employment and revenue supporting around 5,500 full time equivalent jobs and generating £326m revenue to the County’s economy annually (16% of the All Wales total). Over 5.4 million tourist days were spent in the County by 2.9 million tourists staying in one of the 573 separate establishments that offer over 19, 000 bed spaces. 2013 research shows that 92% of day visitors said they would definitely be returning to the County and 75% of UK staying visitors said they would return for an overnight stay again.

Tourism, when planned and managed in a sustainable way, can stimulate wider benefits across the County. Visitor spending on accommodation, food and drink, leisure activities and shopping will support tourism and non-tourism businesses through local supply chains that are an intricate web of formal and informal networks that bring benefits to small, indigenous businesses that are the lifeblood of vibrant communities. Tourism touches businesses that other economic sectors cannot reach. A strong tourism industry and visitor economy will support a more prosperous economy overall and will help to sustain existing and create new jobs. The Destination Sir Gar Management Plan outlines the future opportunities for Carmarthenshire and how to realise them.

Carmarthenshire has 5 key priorities to achieve economic growth in tourism:

- + Priority 1: Raising the profile of Carmarthenshire
- + Priority 2: Improving the tourism infrastructure
- + Priority 3: Enhancing the tourism experience
- + Priority 4: Enhancing the Sense of Place
- + Priority 5: Invest in people

Carmarthenshire’s vision for its tourism economy is:

“To develop a prosperous visitor economy in Carmarthenshire based on its unique strengths and character, which generates higher spend and local income, enhances its image and reputation and improves the quality of life for local communities.”

5,500

5,500: Full time equivalent jobs in the sector

£326m

£326m: Revenue for the county

92%

92%: Tourists committed to return

2.9m

2.9m: Annual number of tourists



Infrastructure and transport

Connections

With an extensive 3,487 kilometres road network, the second longest in Wales, Carmarthenshire has the third highest level of traffic flow in Wales. Carmarthenshire is also a very important freight route providing access to and from the ports in West Wales with the A48 and A40 west of Carmarthen forming part of the Trans European Network. Within the County significant focus has been applied to local rural connectivity and accessibility to employment through bus routes improvements and walking and cycling strategies. Carmarthenshire has also worked hard with key rail stakeholders to improve the attractiveness of services and develop better stations, Park and Ride facilities and service timetables. Transportation infrastructure is the prime enabler that underpins other sectors of the economy. Strategic and local infrastructure has been developed to promote economic growth and activity by building better connections.

There are 4 principles that Carmarthenshire adopts in its Transport infrastructure developments:

- + **Improve access between key settlements and employment sites**
- + **Enhance international connectivity**
- + **Reduce Greenhouse gas emissions and other environmental impacts from transport**
- + **Increase safety and security**

Transport and infrastructure investment in Carmarthenshire to date is there for all to see and enjoy. Increased collaboration across the Swansea Bay City Region once again is facilitating further investment in 6 key infrastructure projects within the County:

Cross Hands Link Road – derived from the Transformational project at the Cross Hands Growth Zone, a 3-phased transport project opening up

access to key strategic employment sites and the wider Cross Hands area including Penygroes and the Gwendraeth valley.

Carmarthen West Link Road – the link road will traverse from Travellers Rest on the A40 into the new academic and media quarter at College Road, Carmarthen Town opening up the access to the forthcoming S4C investment.

Ammanford Junction – improvements to a trunk road junction in Ammanford is envisaged which would relieve traffic pressures in the town and opening up the wider Ammanford road network and town centre.

Llandeilo by-pass – a long awaited by-pass for the Towy valley town of Llandeilo is scheduled in the Welsh Government capital Programme to start within the next 5 years and will significantly improve environmental well-being in the town.

Rural connectivity – connectivity to the County's market towns and rural conurbations is critical to the lifeblood of Carmarthenshire. Collaboration with Traveline Cymru and other key stakeholders will ensure the continuation of Bwcabus – the Transportation Model for Rural Wales in Carmarthenshire providing access into neighbouring Powys and Ceredigion.

Walking and cycling linkages – as part of the obligations under the Active Travel Act a series of walking and cycling linkages to offer sustainable travel options to access employment sites, schools and tourism attractions including a scheme within the lower Towy Valley.

3,487

3,487: Kilometres of road network

4

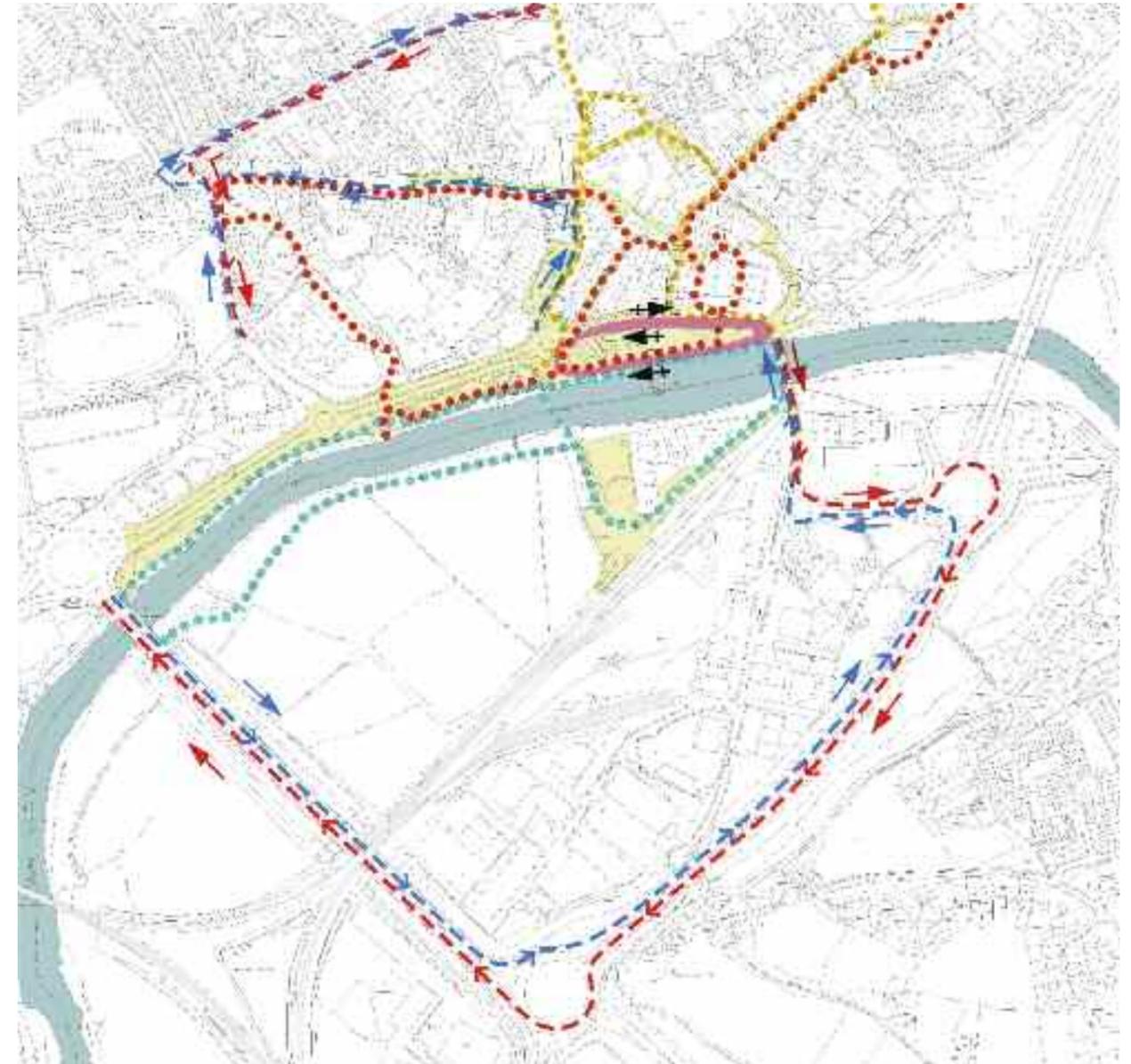
4: Principles of transport

6

6: Key infrastructure projects within the county

A40

A40: Carmarthen West Link Road



Business and skills

The economy within Carmarthenshire is sustained by its diverse business community. From a large self-employment base across Carmarthenshire's conurbations, a massive rural economy, to the SME lifeblood at key employment sites; to emerging sectors and technologies and to the multinational giants in the county – Carmarthenshire's Business community is hugely diverse.

Workforce demography in the county has seen some changes over recent years, with strong sectors emerging in very recent times. Post recession evidence suggests that employment in the 'Creative Industries', 'Energy Environment' and 'Food and Farming' sectors have all demonstrated growth.

The new City Region will see the emergence of a Pareto Employers initiative which will see businesses across the City Region directly influence the economic direction that the region takes and will shape policy according to business need. Carmarthenshire accommodates a large number of employers that are classed as being in Welsh Government's key growth sectors. This initiative will also see the region promoted as a strong inward investment destination in the global inward investment marketplace – much of the work to shape this is already underway in partnership with the Welsh Government and The Swansea Bay City Region Board chaired by Sir Terry Matthews.

In terms of skills – there are also some challenges to consider. Research evidenced in the Regional Delivery Plan for Employment & Skills identifies that there are some general skills challenges that are evident across the Food, Tourism and Creative sectors for instance; the most notable include leadership and management; business administration; and sales and marketing. Working with the academic sector and skills developers

across SW Wales and placing its importance within the Swansea Bay City Region, CCC sees workforce development in the county of paramount importance.

Since 2008, Carmarthenshire County Council working in partnership with stakeholders such as the South Wales Chamber of Commerce and neighbouring local authorities has delivered a Local Investment Fund grant to 460 businesses in the county totalling over £2m, leveraging a further £3.2m in private investment and creating over 400 jobs and safeguarding 1800. This scheme has been an undoubted success across the region.

Enterprise in the County is as strong as ever. Carmarthenshire County Council works directly with key employers and education providers within the county to skill-shape the future work force; this is becoming increasingly popular with many employers who are strategically looking at a synchronised time line to that of Carmarthenshire's continued economic regeneration. The Workways initiative designed to help those struggling to gain employment also saw, since 2009, over 2500 clients engaged and over 40% of clients found and retained full-time employment with businesses of all sectors across the county equating to over 1,000 jobs created as a result of this scheme alone.

Carmarthenshire also hosts The Beacon – Centre for Enterprise a strategic site location and operated by Carmarthenshire County Council, this unique property sees world class businesses operate side by side with new and early enterprises in a professional environment – the site accommodates over 150 people. The Beacon has been a success for its business tenants as it directly provides a service that is needed and this key initiative and all its components can only go from strength to strength.

460

460: Businesses that received LIF

£3.2m

£3.2m: Private investment levered

1,000

1,000: Workways jobs created

150

150: People accommodated at The Beacon







SECTION

02

Next...

The scene is set and the record of regeneration delivery is there for all to see and enjoy. The next journey will see 6 transformational projects emerge upon the economic landscape in Carmarthenshire. These are envisaged to be of a scale to similar projects across Wales and the City Region and will create around 5,000 jobs.

Additional investment has been identified, some of it secured and more to be achieved and strong partnership working with our stakeholders in our county will enable the transformational projects to materialise.

Much of the work to formulate these projects has come about due to an active Regeneration team over the past years, with targeted investment; clever joint working; innovative approaches and a will to provide what is needed.

There are 6 key transformational projects:

- + Ammanford
- + Carmarthen
- + Carmarthenshire Coastal Belt
- + Cross Hands Growth Zone
- + Llanelli
- + The Rural Economy

Ammanford

A strong and vibrant market town at the foot of the Black Mountain and defined by the Amman and Towy Valleys – there are 10 physical measures identified for action within the town.

The 10 areas of future works all vary in size and cut across actual physical locations within Ammanford. Many of these works will be prioritised through the ongoing and productive consultation process with the Ammanford forum which is a critical group of key stakeholders in the town including public and advisory bodies and the trade community.

Transport and movement

It is widely acknowledged across both public and private sectors that Ammanford as an area has large potential for economic growth with transport improvements clearly identified as providing this stimulus. The main focus for transport improvements surrounds the traffic light area on the Tir-y-Dail and Wind Street junction. It has been identified that a roundabout solution here and some investment of around £2.5m would bring significant benefits to Ammanford and the wider area. Immediate commute and visitor trips would be improved and it is estimated that around £2.3m worth of time would be saved per year with the connectivity into the A483 and Towy Valley also being enhanced. There is a direct impact upon employment accessibility – over 3,000 jobs in Carmarthenshire alone will become more accessible as a result of this improvement, plus the further reach into the Swansea Bay City Region economy. The long term economic benefit of such an improvement is calculated to be in the region of £82m over 60 years.

There is also a large ambition within CCC to secure the funding of and development of the Tycroes-Ammanford link road. This is an aspiration at present however it is deemed as something that would like to be achieved as a key regenerative action.

Employment space

Ammanford is in need of quality employment space. Plans are underway to renovate and refurbish the Glanamman workshops – this will see an investment to the site bringing much needed industrial space to the market. Funding types of development such as these involves working with external grant finance providers; private sector partners and using innovative ways to achieve the outcome. Opportunities for increased retail and market space towards the end of Quay Street are also being explored.

Gateway sites

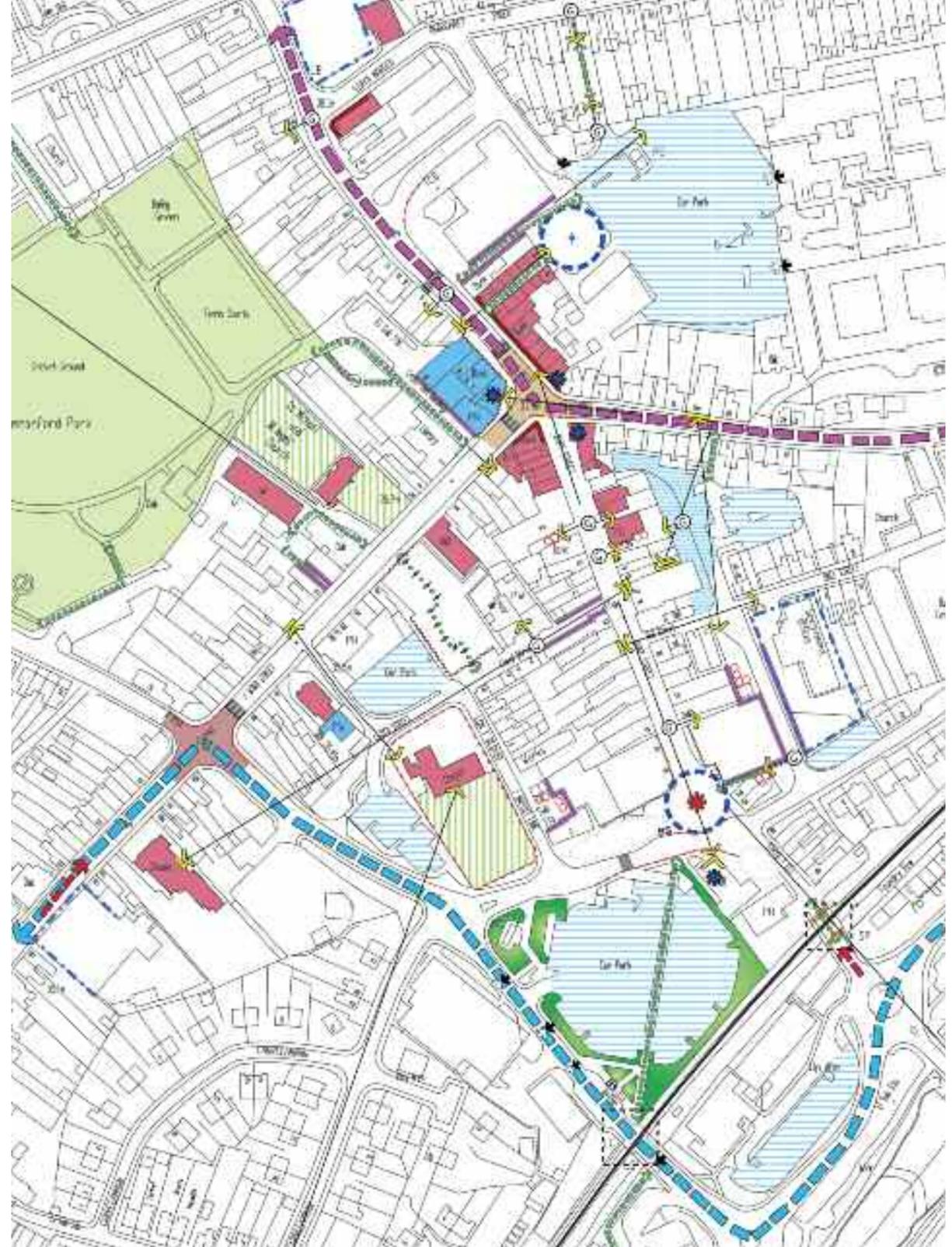
Ammanford currently has 2 gateway sites under development the former Police Station site and Foundry Row for a variety of uses including leisure and housing respectively. Both projects are generating interest with developers and private investors to realise the 2 sites back into use. The former Police Station Site could see employment created in the leisure sector and investment into traffic improvements in the area, and bringing back key gateway sites into economic use.

There are wider Community Development initiatives through the Communities First programme within Ammanford that contribute and underpin Ammanford Town's Regeneration. This programme will continue to work in the area focussing on 3 themes of Prosperity; Health and Education all to tackle poverty. This will be achieved by focusing on digital, basic and financial inclusion support; volunteering programmes and skills development.

continued →







Carmarthen

Carmarthen is identified as an area of Transformation in its own right. Whilst having played its part in significant regeneration activities in recent times, there are so many new opportunities for the town to experience. The developments at Carmarthen West; Yr Egin and the Town generally all generate regeneration scope for the next 15 years.

The most recent and notable achievement for Carmarthen is the decision by S4C to re-locate to Carmarthen. 'Yr Egin – The Creative Exchange', a new media and culture hub at the University of Wales Trinity Saint David's Carmarthen campus will be developed with the Welsh broadcaster as the anchor tenant for the site. 55 core staff from S4C will relocate making Carmarthen its new headquarters. Yr Egin will have a significantly positive impact as it will be a national hub for the creative industries as well as a 'one-stop shop' for independent TV producers and multi-media companies. In addition, Yr Egin will excel in promoting Carmarthen as a gateway to 'Y Fro Gymraeg', the Welsh-speaking heartland. Based on the office and workspace within Yr Egin as well as further potential development at the new creative exchange, around 200 full-time posts will be generated. In addition to these, further part-time posts and apprenticeships will be created.

Based on implied indirect and induced employment multipliers derived from previous analyses of S4C's economic impact, the direct employment will support another 500 jobs within the region. In addition to the Welsh language and economic benefits, there will also be significant community

benefits as such a high-profile; visually striking development will have a positive impact on the general standing of the area in terms of how it perceives itself as well as how it is perceived further afield.

Carmarthen West also plays its part in opening up the area for increased regeneration and economic activity. The Carmarthen West element in Carmarthen's growth will see a new link road introduced to the local infrastructure network which will increase movement and flow towards the new developments linked to Yr Egin and S4C. The link road will traverse from Travellers Rest on the A40 into the new academic and media quarter at College Road, Carmarthen Town. This investment will also serve an increase in the local housing stock – 1,200 new homes will be built along the new road.

Carmarthen Town has its own Master Plan. This has been developed in full consultation led by the Carmarthen Town Regeneration Forum and has focused on 4 key priorities:

- + **Growth of marketing & tourism**
- + **Improving the public realm and built environment**
- + **Movement and infrastructure**
- + **Future commercial opportunities**

The Master Plan is not only a detailed vision and direction document for the town but is an example of exemplary consultation between the numerous stakeholders to the town. An ambitious yet achievable aspiration has been presented.

continued →



Carmarthen

continued

Quayside areas are connected through their historical significance and the public realm. They are also connected to the Pensarn and Riverside developments. The ‘Old Town Quarter’ surrounding the King Street areas and Jackson’s lane is clearly defined and designated area to preserve and promote the traditional and historical features of the town centre, while offering a diverse range of modern facilities and experiences for the visitor. Retail product emphasis will be on small, independent and boutique outlets which offer an alternative experience to the larger retail chain stores in the modern shopping developments of Merlin’s Walk and St Catherine’s Walk.

A number of commercial development sites have also been identified around the town centre and nearby secondary retail and industrial estates such as Llangunnor and Pibwrlwyd. The establishment of S4C within Carmarthen will undoubtedly bring secondary and tertiary enterprises looking for a new base in close proximity to S4C, town and the main transport links.

Via its relationship with University of Wales Trinity St Davids and Coleg Sir Gar, Carmarthenshire County Council shall be working to develop what is currently the Pibwrlwyd College Campus in Carmarthen as part of the wider Transformational Project of Carmarthen. Proposals for the site are integral to the long term success of the University of Wales Trinity Saint David Group that includes Coleg Sir Gâr.

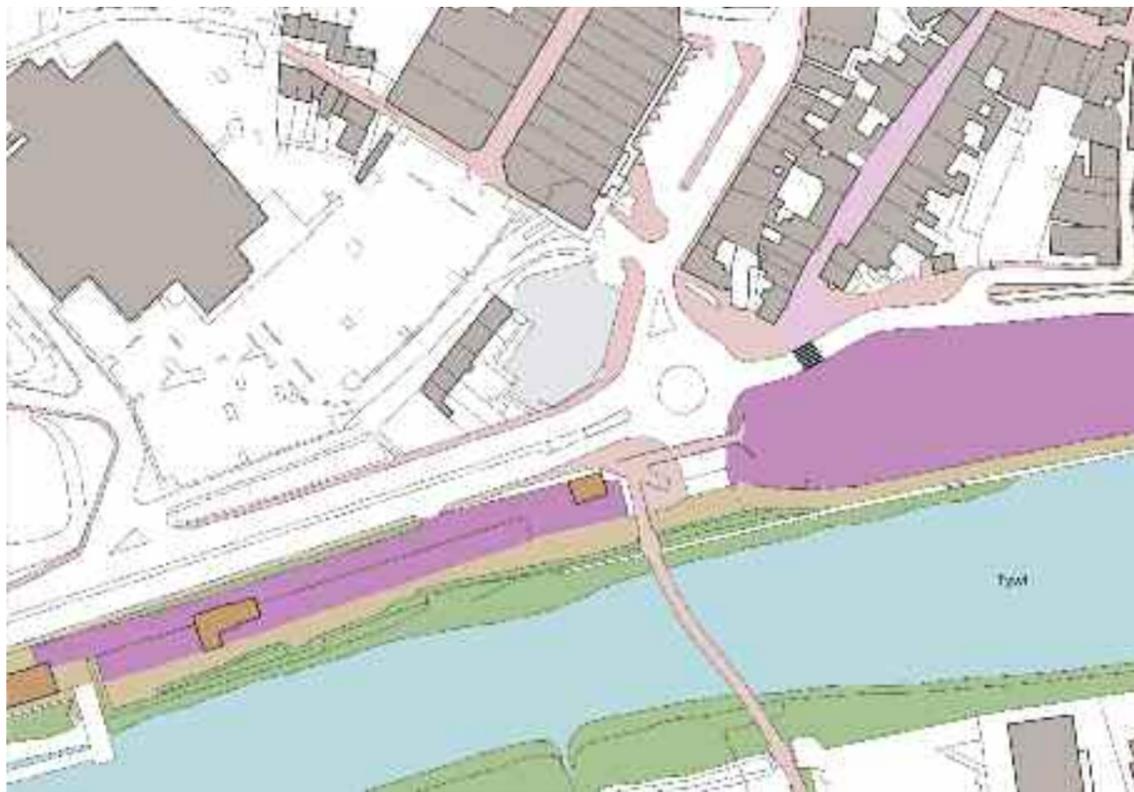
Strategically, the site represents a key area for future employment growth for Carmarthen, consolidating and enhancing the status of Carmarthen regionally by delivering sustainable growth.

The site offers potential for the consolidation and re-development of the existing elements of Coleg Sir Gâr and a business park centred on employment uses compatible with the activities of the college.

The vision for Pibwrlwyd:

- + Realising national, regional and local planning strategies and priorities
- + Providing a gateway development for Carmarthen
- + Connecting business, enterprise, learning and leisure
- + Connecting the town, county and region
- + Developing creativity and innovation
- + Developing tertiary education and skills
- + Providing a dual sector University approach based on partnership

All opportunities throughout Carmarthen will be enhanced through sympathetic consideration given to the natural environment and heritage of the area.



Carmarthenshire Coastal Belt

The Carmarthenshire Coastal Belt is formed around a journey from East to West along the county's dramatic coastline. Commencing at Bynea and ending at Pendine, the voyage reveals pockets of discrete regeneration plans across a 50 mile sweep incorporating South Llanelli; the Witches Hat and the Pembrey Peninsula. There are wealth of under used natural assets that can be sympathetically exploited for economic development.

Regeneration from Bynea to Pembrey by the Llanelli Waterside Joint Venture will continue. The Joint Venture JV agreement is due to end in 2017 however CCC envisages the development sites to be critical and a priority for regeneration moving forward and will continue to lead in its development. The track record to date is clear – link roads; golf course; cycle-ways; employment sites; medical establishments; nature sites; housing and leisure all fronting the Llanelli sea-board.

The three main longer term priorities for the Llanelli Waterside Joint Venture will see Delta Lakes; North Dock and Burry Port come more to the fore.

Delta Lakes, a 34 acre site adjacent to the coastal link road is ideal for a mix of commercial and business development. Overlooking the lake and parkland on one side, and the coastline on the other, the aspect is particularly appealing. Considered to be the Llanelli Waterside's most prestigious business park location there is an opportunity to develop a mixed use and modern business park in line with the desire to attract companies from key growth sectors such as the Life Sciences; Private Healthcare and Financial Services sectors. In total the potential exists to accommodate approximately 275,000 square feet of floor space and significant employment opportunities and volumes.

Regarded as the axis of Llanelli Waterside the eighteen acre North Dock site is at the heart of the Millennium Coastal Park and overlooks Carmarthen Bay and the rejuvenated dock. North Dock has evolved over the years generating a variety of development opportunities. It has grown into a natural visitor destination with increased footfall year on year due to the many leisure activities North Dock offers. At the head of the dock lie the immediate development opportunities – suitable for commercial uses such as a café bar, restaurant and a landmark hotel. These will create a lively visual focus from the bridge accessing the dock and generate linkages further west along Llanelli Waterside into the wider leisure and recreation developments at Old Castle Works.

Burry Port has enjoyed significant investment to date in converting the old tidal harbour into a modern marina and yet the facility still retains its Victorian charm and is just a stone's throw from a small but vibrant town centre. Investment has been made in infrastructure and transport to make the area more accessible and now provides a gateway into the Pembrey peninsula. Pembrey peninsula is already recognized nationally as a tourist destination and it offers huge investment potential to capitalise on existing assets including Ffos Las racecourse, Dyfatty Park, Pembrey Country Park and Pembrey Airport. New opportunities will emerge for further investment in retail, residential and leisure development. A strategic review and master plan of the Pembrey Peninsula will be undertaken to identify regeneration opportunities across the area.

continued →



Carmarthenshire Coastal Belt

continued

Leaving the peninsula to the West sees recent investments at Kidwelly Quay improving access and public realm, and into the Witches Hat. Looking at a map of the Carmarthenshire Coastal Belt sees three rivers form the famous ‘Witches Hat’ which seats such seaside gems as Ferryside; Llansteffan; Laugharne and Pendine.

The Carmarthenshire Coastal Belt is a myriad of current and future commercial opportunities. Alternative ideas are also being explored for wet weather activities and innovative new products and ideas offering something completely new to the coastal belt. General increases in visitors; square footage; quality offerings and visitor spend are the main objectives along the belt.

Pendine in particular will see a significant investment and regeneration schedule going forward, and will see a museum complex developed; an eco-hostel and an outdoor activity accommodation centre and significant investment in parking facilities and landscape and public realm works. These types of projects are typically undertaken with private sector partners and external grant funders to realise the best possible outcome for the area and at lower financial commitment to Carmarthenshire County Council. Such large investment into Pendine demonstrates the importance of the burgeoning Tourism sector to our county – the scale of these projects will be of the like never seen in Pendine, and along with the features at Llanelli will beautifully book-end the Transformational Carmarthenshire Coastal Belt.





Cross Hands Growth Zone

The Cross Hands Growth Zone has emerged as a Transformation project from an exciting array of individual developments offering a huge regeneration impact clustered around the Cross Hands settlement area, all of which are at varying stages of development which contribute significantly to the economic growth of the Swansea Bay City region.

There are 5 prominent development zones at Cross Hands:

Food Zone – Cross Hands Food Park

The mature Cross Hands Food Park accommodates some of the UK's most productive food businesses and the site employs around 1,000 people. Scope still exists to enhance the food park further and to capitalise on the significant investment made to date with a mid plateau offering an investment opportunity.

Business Zone – Cross Hands Business Park

A 38 hectare mixed use development supporting major retailers and commercial establishments, a significant employment site in its own right with around 800 people employed, the park has a further 4 hectares available for retail and commercial growth.

Employment Zone – Cross Hands East Strategic Employment Site

Constructed in 2 phases, Phase 1 is complete and will generate over 17,000 square metres of floor space across 8.5 hectares of land. This site will accommodate next generation businesses aligned to the key sectors such as life sciences; financial &

professional; advanced manufacturing; environmental; creative and agri-food technologies. The site will be a mix of high quality industrial, office and potential hotel uses. Significant effort and resource has also been made to respect the ecological impact of the site on the flora and fauna. Phase 1 is expected to create around 650 jobs with a further 500 anticipated for Phase 2.

Mixed Use Zone – Cross Hands West

Set across 21 hectares, the mixed use zone, currently under development will see a wide range of uses with provision for a 75,000 square foot retail superstore; medical centre; 280 new homes; new playing fields and provisions for new road infrastructure through the scheme to open up wider communities. In total, Cross Hands West is anticipated to lever in over £25m of private sector investment.

Residential & Mixed Use Zone – Emlyn Brickworks

A mixed use redevelopment of the former Emlyn Brickworks site which includes proposals for 250 homes on a 21 hectare site, the site is situated north-east of the Cross Hands Growth Zone on the boundary with Penygroes and is a key development benefiting from the proposed Phase 2 works to the Cross Hands Link Road.

Given the scale of the Cross Hands Growth Zone, there are many other economic developments that will facilitate the zone including the £18.4m redevelopment of Ysgol Maes Y Gwendraeth; Cross Hands Bus Interchange; Superfast Broadband; the Cross Hands Link Road and a sympathetic approach to regeneration in ecological terms.

continued →





CROSS HANDS GROWTH ZONE AREA MAP

Key

- FOOD ZONE: Cross Hands Food Park
- BUSINESS ZONE: Cross Hands Business Park
- EMPLOYMENT ZONE: Cross Hands East Strategic Employment Site
- MIXED USE ZONE: Cross Hands West
- RESIDENTIAL & MIXED USE ZONE: Emlyn Brickworks
- FUTURE LINK ROADS: Routes to be determined



Parth Twf
Cross Hands
Growth Zone

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Llanelli

Llanelli is the fifth largest urban area in Wales, and has a significant role to play in the new Swansea Bay City Region.

Benefiting from large scale investment in recent years across many sectors including leisure; culture; retail; landscape and commercial, there exists further opportunity to enhance the town centre.

Forecast at around £60m of investment; Llanelli Town Centre will witness the addressing of housing need and provide access for all through a radical renewal of the gateway area around Station Road, including railway station improvements, upgrading of public and private housing including energy efficiency improvements to 200 homes, and the urban setting for the gateway. This investment also complements and enhances the adjacent Llanelli Waterside Joint Venture activities and directly links to principal transport links within the Swansea Bay City Region and the Carmarthenshire Coastal Belt offering.

Opportunity Street – in order to meet its objectives Carmarthenshire County Council has acquired empty properties on Stepney Street in Llanelli Town Centre. The Opportunity Street development will nurture jobs, skills and growth. The space will contribute to a diverse mix in the high street including flexible retail space, and will support business start-ups and social enterprises through training and service provision. The project will also provide solutions to the local housing need by creating affordable 1 and 2 bedroom residential properties as identified by recent housing need surveys.

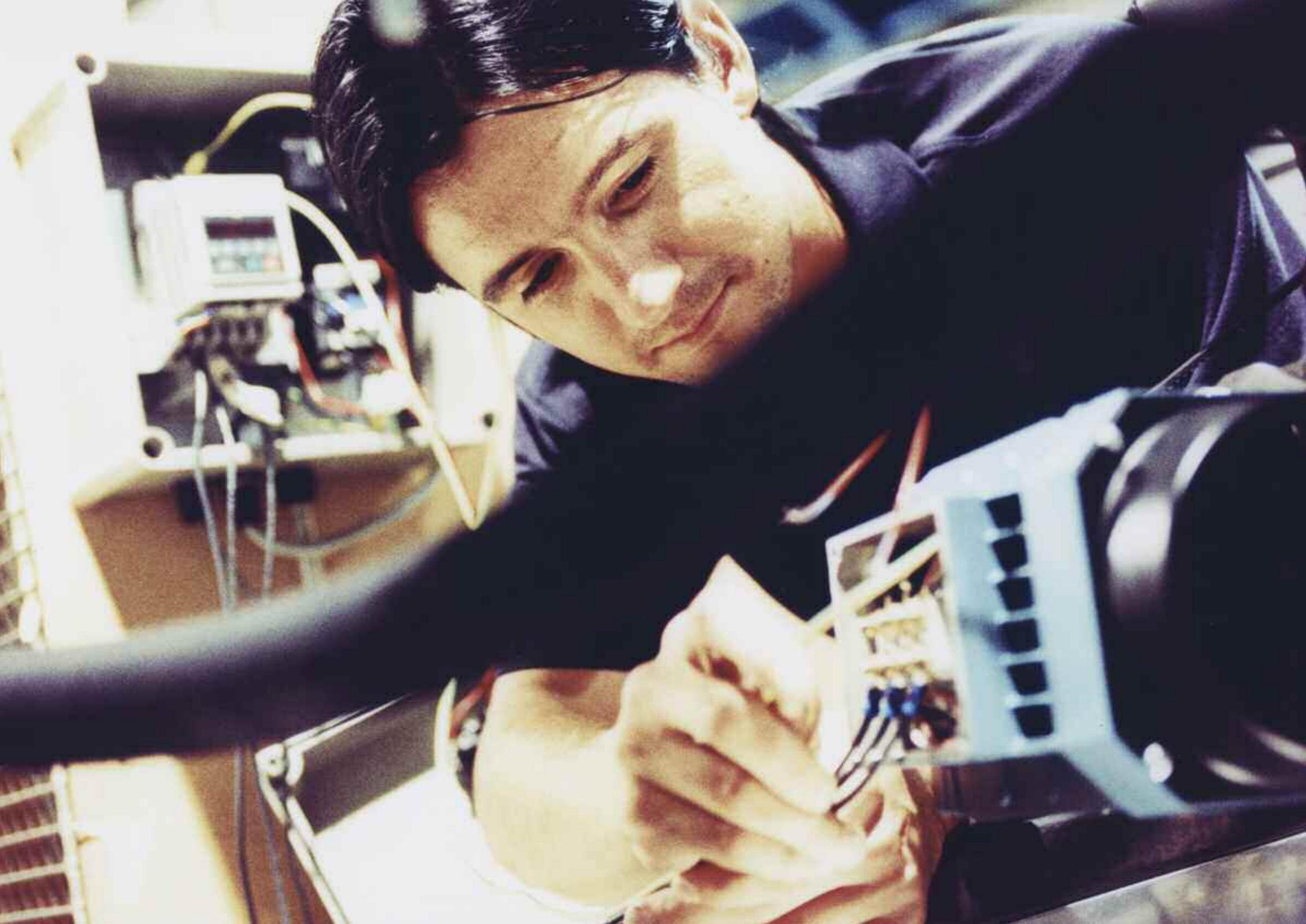
There are wider Community Development initiatives through the Communities First programme within Llanelli that contribute and underpin the Transformational project in Llanelli. This programme will continue to work in the area focussing on 3 themes of Prosperity; Health and Education all to tackle poverty. This will be achieved by focusing on digital, basic and financial inclusion support; volunteering programmes and skills development and working in a broader regeneration context including developing properties such as the YMCA building for restoration and transformation.

Work is also underway to make Llanelli a Business Improvement District (BID). This innovative approach will see the trade working closely with CCC and many other private and voluntary sector stakeholders to address 4 key themes:

- + **Increasing retail vibrancy and strengthening the business community**
- + **Marketing Llanelli's distinctive assets and changing perceptions**
- + **Increasing safety and cleanliness**
- + **Advancing access and gateways to town**

A £700,000 loan fund for the town centre will be made available to the business community to improve properties.

continued →



Llanelli continued

Opportunities have been identified where some public sector employment sites could be de-canted into town centre areas to increase general vibrancy during the weekdays and drive an increase in town trade as a result. The ambition is to create a confident investment environment whilst renewing the area in general. Bold actions will be required to make a difference and avoid much of the same to date – this could include using statutory powers to regenerate hotspot areas – changes in culture and approaches are required to make things happen.

The breadth and sum of the parts of regeneration activity in Llanelli shapes the area into a Transformational project in its own right, the ambition to keep driving economic benefit to the town has never been higher.





The Rural Economy

The final Transformation Project identified focuses upon the Rural Economy of Carmarthenshire.

This project aligns itself fully to the Local Development Strategy for rural Carmarthenshire which has been developed by the Local Action Group – Grŵp Cefn Gwlad to provide an overarching framework for the sustainable regeneration of rural Carmarthenshire.

With rural areas accounting for more than 40% of the County's population, the rural economy has a crucial part to play in achieving the goals of the County's wider regeneration. The strategic direction is defined by the priorities in the wider Swansea Bay City Region.

The key characteristics and challenges of rural Carmarthenshire are:

- + A predominance of small and medium sized businesses with 87% of businesses employing less than 9 employees
- + Higher proportions are employed in low value added services such as agriculture
- + Migration of talented and skilled young people is a key issue for rural areas which exhibit a lower proportion of 20-39 year olds
- + Still limited penetration of public transport provision in parts of rural Carmarthenshire and frequency of service
- + Limited, slow speed broadband access in the more remote rural areas
- + Shortage of employment space in rural areas
- + All rural wards, except Carmarthen town and Llandeilo are highlighted within the top 30% most deprived in relation to access to services
- + The number of Welsh speakers has declined by 6.2% to 43.9% which represents a loss of 11,165 Welsh speakers in the county between 1991 and 2011

The Local strategy sets out a partnership approach to tackle the key challenges that are hindering employment and prosperity growth in rural Carmarthenshire. The actions proposed for the Rural Economy are shaped by the Swansea Bay City Region strategic aims and they are:

To support business growth, retention and specialisation

Traditional sectors such as agriculture have been joined by tourism, education, health and creative industries as the backbone of the rural economy. Much of the established business base does not fall into the high growth category. The goal is therefore to attract, develop and retain a larger stock of sustainable businesses; higher value and more productive businesses and a bigger cohort of SMEs that are geared to rapid growth by:

- + Providing tailored business advice and support for retention and growth
- + Increasing job opportunities by supporting employment growth within indigenous businesses
- + Enhancing the resilience of indigenous employers
- + Increasing the productivity, diversity and efficiency of farming and forestry businesses
- + Developing a more entrepreneurial culture

To support a skilled and ambitious workforce

Developing a thriving and sustainable economy with higher value employment will necessitate an improvement in local skill levels. To achieve this there is a need to up-skill the existing workforce to meet more challenging future business requirements and to ensure young people leave education suitably qualified for and informed about future employment opportunities by:

- + Improving attainment and ambition
- + Ensuring education provision is aligned to and shaped by employer needs

continued →



The Rural Economy

continued

To seek to maximise job creation and employment prospects

Projections indicate that economic recovery and growth will follow a pattern of jobless growth. This is further compounded by the fact that a fairly high proportion of working age population in the rural economy is classed as being economically inactive. In response, the aim of the strategy is to increase the availability and accessibility of sustainable employment opportunities by:

- + Supporting economically inactive back into work
- + Promoting and facilitating local enterprise development

To support the development of a knowledge economy

We need to invest further in the application of new technologies to ensure that our local businesses are able to compete in wider markets by:

- + Supporting and encouraging greater take up and application of new technologies amongst SMEs
- + Strengthening links between SMEs and research facilities

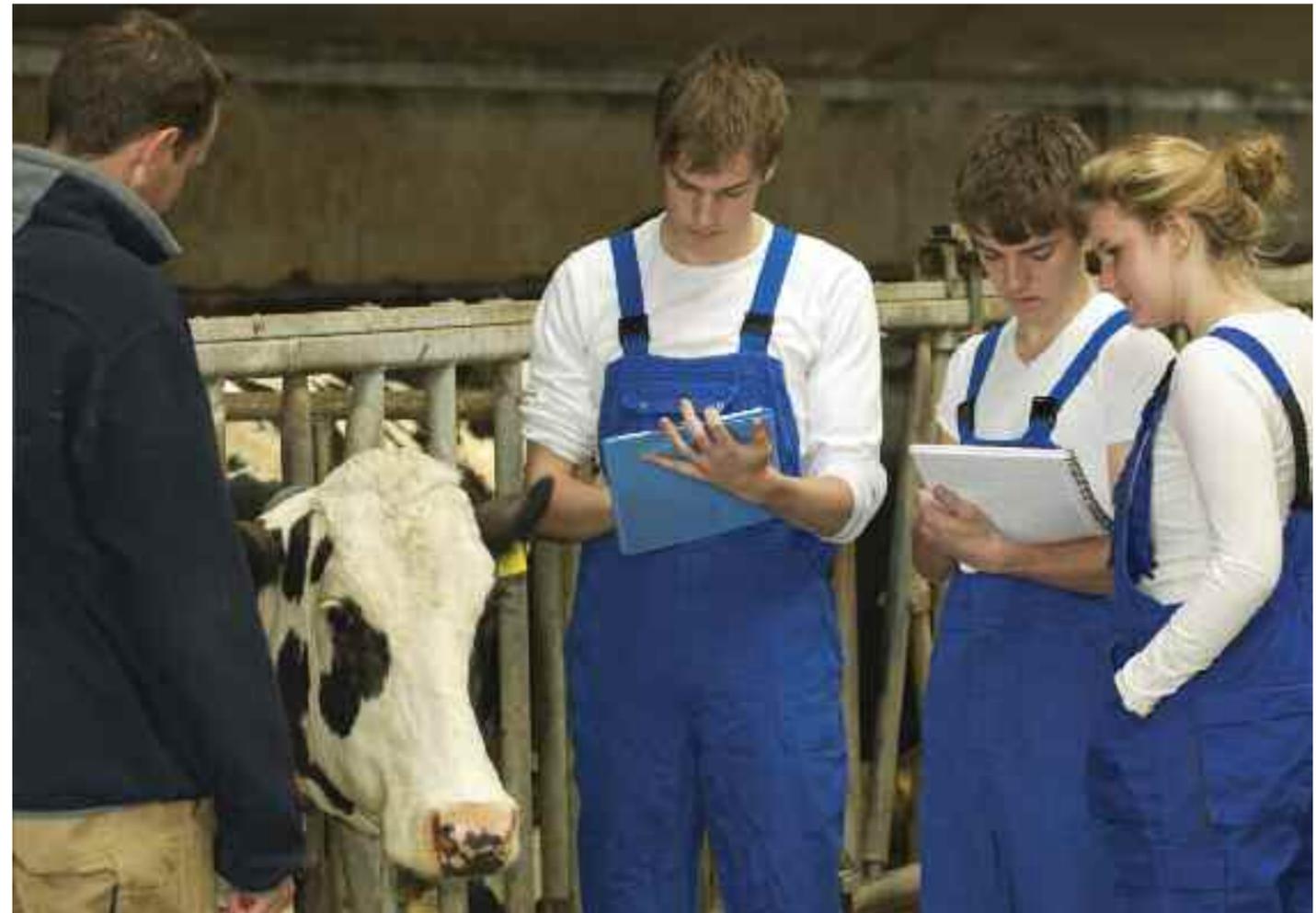
To develop the distinctiveness and attractiveness of the area in terms of tourism, business investment and addressing rural poverty

Rural Carmarthenshire consists of highly distinctive and attractive locations with a mix of market towns and stunning landscapes. In order to attract and retain talented people there is a need to ensure sufficient access to key services which are slowly being lost in many rural towns and villages.

Infrastructure is also a vital component including employment sites and premises; attractive market towns and access to rural transport – key actions will be:

- + Developing and implementing a programme of investment capable of engaging visitors and investors to the area
- + Targeted development of land, property and infrastructure
- + Maximise the opportunities available from the Next Generation Broadband infrastructure
- + Supporting and developing the use of the Welsh language
- + Ensuring access to services within rural areas by developing new approaches to service delivery and supporting social enterprise development

The project will aim to address the challenges facing rural Carmarthenshire through a number of funding sources including the Rural Development Plan; LEADER and other European Structural and investment funds as well as other non-European funding streams.







SECTION

ORR

The future

The purpose of this document is to highlight the depth and extent of Regeneration in Carmarthenshire to date and to highlight the future Transformational projects on the horizon.

The 5 key areas defined by the new Swansea Bay City Region Strategy provide a direction that will improve the economy – the measures by which the success will be seen are the Gross Value Added (GVA) of the economy, and Employment Growth. Couple the 5 key areas of the strategy with the collaborative strength of 4 Local Authorities, this provides the best environment to increase the GVA and employment over the next 15 years.

The identification of the six transformational projects for Carmarthenshire increases the strategic importance of a number of the aforementioned business sectors. The creation of the Food Zone in the Cross Hands Growth Zone builds on the strong Food and Farming foundation that has existed historically in the county. The Carmarthenshire Coastal Belt and its favourable location to other tourism hotspots places the Leisure and Tourism sector in a key enabling position. Additionally the relocation of S4C to Carmarthen town will catapult the county into one of significance for the Creative Industries sector in Wales.

Carmarthenshire's economic make-up is diverse and huge, and there are lots untold. It is encased in a tourism offering; has massive infrastructure and physical developments to its name and a varied business community. Much has been overcome in recent times, and continued growth is forecast as can be seen from the 6 Transformational projects spread across Carmarthenshire. These projects are derived from a diligent and accurate strategy to date expertly delivering the required outputs across the county – every power available to achieve the outcome will be used, and a radical way of working is essential. Foundations are in place from which to build and create 5,000 new jobs.

Carmarthenshire's position in the new Swansea Bay City Region is exciting. Thinking big across the board is now a pre-requisite for regenerative works. This can only be achieved through collaboration and innovative approaches to get the job done.

Contact

Contact

The projects scheduled and identified in this document are wide ranging and by no means is an exhaustive list. Economic Development is variable by its nature – to keep up to date with all developments and partners' activities and progress then keep in touch with the following sources of information:

Swansea Bay City Region

www.swanseabaycityregion.com

 @SB_CityRegion

Carmarthenshire County Council

01269 590214

www.carmarthenshire.gov.wales

 @CarmsCouncil

