

Carmarthenshire Local Development Plan

Employment Land Review 2020



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1 BACKGROUND

The planning system is central to ensuring continued economic growth and providing jobs and investment in an environmentally sustainable way. Economic growth generates wealth and raises living standards and is driven by an increase in employment and productivity which in turn is determined by higher levels of investment, innovation, competition, skills and enterprise. In this respect the Local Development Plan represents a central component in establishing and setting out the opportunities for growth and the framework to guiding and facilitating investment.

In terms of the adopted Carmarthenshire Local Development Plan (LDP), and the evolving Revised LDP, the role of employment and the economy in supporting the Plan and its Strategy represents a central consideration. In this regard, there is a need to ensure that sufficient, suitable and deliverable land for employment purposes is designated in accordance with sustainability principles and the Plan's Spatial Strategy.

With regard to providing up to date economic evidence (including the production of employment land reviews (ELRs), to support the LDP, Paragraph 5.4.7 of Planning Policy Wales (PPW, Ed11) states that:

Development plans and development management decisions should be based on up-to-date local and sub-regional evidence. It is important that such evidence demonstrates the suitability of the existing employment land supply as well as future provision in relation to the locational and development requirements of business.

Carmarthenshire is the third largest County in Wales, in terms of geographical area, and has the greatest number of settlements. With its diverse rural heartland juxtaposed with the post industrial south eastern areas, it is the task of the LDP to cater for this diversity and complexity in terms of its employment provision.

In ensuring that the current adopted LDP remains up to date, a review was undertaken into its content with the outcomes published in the Review Report. The Report, whilst finding that many aspects of the adopted LDP are functioning effectively, also identified that there were issues in relation to parts of the Plan and its strategy. The Review Report showed that parts of this strategy were not being delivered as intended with both the level and spatial distribution of growth requiring further consideration. It concluded that the preparation of a revised LDP to replace the existing adopted Plan should be commenced.

The Country was recovering from an economic downturn, before the onset of the Covid-19 pandemic in March 2020. The economic implications of the pandemic, as well as that of Brexit, will be explored in future employment land reviews.

2 INTRODUCTION

Evidence from this fifth Employment Land Review (ELR) will be used to provide evidence to support the Annual Monitoring Reports (AMRs) of the LDP and will contribute to towards preparation of the Revised LDP. Due to the nature of the set timescale for the preparation of the Revised LDP (as set out in the Delivery Agreement) production of this ELR was undertaken in conjunction with the extensive revision work carried out as part of the revised plan. Consequently, the figures set out within this ELR mirror those set out within the Deposit Revised Plan, whilst also covering the monitoring of the current LDP.

This ELR utilises information obtained from our corporate partners in Economic Development and Corporate Property, where appropriate, in accordance with *Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan* (Welsh Government, 2015).

The Council has a statutory responsibility to ensure that sufficient employment land is available to meet identified need. In particular, it is a reflection of the requirements of the current edition of Planning Policy Wales and Technical Advice Note 23 *Economic Development*. Paragraph 5.4.3 of Planning Policy Wales (PPW, Ed.11) states that:

Planning authorities should support the provision of sufficient land to meet the needs of the employment market at both a strategic and local level. Development plans should identify employment land requirements, allocate an appropriate mix of sites to meet need and provide a framework for the protection of existing employment sites of strategic and local importance.

Ensuring that there is an adequate supply of employment land in a range of settlements across the County helps provide certainty and confidence, for example by attracting investment to the larger urban areas, and by providing more locally based business opportunities in the more rural areas, as well as helping to sustain the vitality and viability of the range and diversity of communities within the County.

3 STUDY METHODOLOGY

For each survey year, the position set out is that for the 1st April in that year. The baseline for this survey is 1st April 2019 to 31 March 2020.

Differentiation needs to be made between employment sites that have been identified as LDP allocations (proposed sites) and those which have been annotated as existing employment sites within the LDP. The information for the allocations in the current Adopted Plan is set out below for information purposes, along with information relating to the proposed allocations in the Revised Deposit LDP. Information on the existing sites is not covered in the AMRs as these do not form part of the proposed employment portfolio over the Plan period. These existing sites nevertheless form a vital part of the overall employment provision within the County, and therefore they are covered in detail within this ELR.

For the purposes of this Review, employment land uses are taken to include those in Use Classes B1, B2 and B8, as set out in the Town & Country Planning (Use Classes) Order (Wales) 1987 (as amended). However, it is acknowledged that other use classes cover employment related activities and are often very closely related to the B Class uses, such as A2 (offices) and sui generis uses. These will be identified in the following sections.

This Review covers:

- All LDP employment allocations, (and mixed use allocations where an employment use on part has been designated)
- All existing employment sites annotated on the LDP Proposals Maps
- Windfall employment sites permitted since LDP adoption – sites with planning permission for employment uses that are not located on the above two categories

In total, 108 sites (including both LDP allocations and existing sites) were surveyed for the 2020 Review. The information collected for each of the existing sites is:

- Total site area (Ha)
- Total area of buildings/enclosures (B Use Class) (Ha)
- Proportion of B Use Class operations (%)
- Buildings and enclosures in use for other purposes (Ha)
- Buildings not in use (vacant) (Ha)

- Land within the total site area used for infrastructure and landscaping or likely to be difficult to develop (Ha) e.g. areas for roads and parking, landscaped areas and land unlikely to be amenable for development
- Planning application reference numbers are recorded for employment and non-employment planning permissions within each site for both allocations and existing sites.

In relation to LDP allocations, the total size is set out together with the size of area taken up through development and or planning permissions.

The results for existing and proposed sites are set out separately and then (where the information is available) combined and totalled (as in Table 1 below).

A table recording the full results from the 2019/20 survey period is contained within Appendix 1.

As highlighted above, it is important to emphasise that this ELR has utilised the work done as preparation of the Deposit Revised LDP, where a full review was carried out and a greater level of analysis was undertaken in respect of the individual sites. This has led to some sizeable changes to the figures from previous years in some instances. Some of the reasons why this has occurred include the following:

- Increase in the amount of land allocated for employment on certain sites, reflecting new permissions;
- Reduction or removal of certain allocations in the current LDP due to permissions for alternative uses;
- The change from proposed to existing to reflect current uses;
- Increase in size of some sites identified as existing employment land to reflect current uses;
- Decrease in size of some sites identified as existing employment land to reflect no longer in use, or derelict;
- New allocations of deliverable sites reflecting new permissions or candidate sites;
- Correction of sizes due to updated GIS information

4 THE RESULTS

4.1 EXISTING EMPLOYMENT SITES

The total site area of land identified for employment purposes in 2020 was 446 Ha.

Within the total site area, buildings / enclosures in use (both for employment purposes - B1, B2, B8 and other uses) in 2020 covered 109 Ha.

Of this, buildings / enclosures in use for employment purposes (B1, B2, B8) amounted to 86 Ha (79%).

Those in use for non-B Use Classes covered 18 Ha. However, much of this is taken up by uses closely related to those in the employment use classes (sui generis / other classes - A, C, & D Use Classes):

- Sui generis –12Ha).
- Other (A,C,D)– 6Ha.

The area within sites for use in infrastructure (inc. Car parking / landscaping / areas too difficult to develop) amounted to 337 Ha.

‘Vacant land’ i.e. buildings/enclosures vacant or not in use in 2020 was nearly 5 Ha.

In percentage terms County wide, and in terms of overall site areas, the proportions used for different land use classes were as follows: Source: Master Spreadsheet

- Buildings/enclosures for employment use (B1,B2,B8) – 19%.
- Buildings/enclosures for non B use – 4%.
- Area in use for infrastructure/landscaping or too difficult to develop – 76%¹.
- Vacant buildings/enclosures – 1%.

However, by eliminating the sizeable areas taken up infrastructure/landscaping etc and breaking this down to area of buildings/enclosures only, the proportions were as follows: Source: Master Spreadsheet

- Buildings/enclosures for employment use (B1,B2,B8) – 79%.
- Buildings/enclosures for non B use – 17%.
- Vacant buildings/enclosures – 4%.

¹ Note: This includes areas associated with, and essential to, the land use activity and employment operation.

The following section sets out the changes that have occurred to the employment land (both proposed and existing) during the 2019-20 period. This has been split between the changes that have occurred in respect of the current LDP, and those that have come about as part of the LDP Review process. Those in respect of the current LDP are merely included for information purposes. With regard to the comparison with previous years data (namely 2018/19) the new figures from the review process have been used.

4.2 PROPOSED EMPLOYMENT SITES – CURRENT LDP:

The delivery of employment land is an important element of the LDP. Evidence presented in the first four AMRs has revealed that take up of employment land on LDP allocated sites has continued to progress since the adoption of the Plan in December 2014. The LDP Monitoring Policy Target for employment is that the 111.13 Ha of employment land allocated in Policy SP7 is developed over the Plan period. The indicators, targets and triggers set out in the LDP are as follows:

Indicator	Annual / Interim Monitoring Target	Assessment trigger
<p>Permissions granted for development on employment land listed in Policy SP7.*</p> <p>Permissions for, or availability of, on site or related infrastructure which facilitates delivery of employment sites (ha) as listed in Policy SP7.*</p>	<p>25% (i.e. 27.78ha) of employment land allocated by Policy SP7 either attains planning permission or is available for development within the first 2 years of the Plan after adoption.</p>	<p>Less than 25% of employment land allocated by Policy SP7, with an additional variance of 20% under the target figure (i.e. 22.22ha) to allow for flexibility, is permitted or available within 2 years of adoption.</p>

The monitoring policy target relates to the amount of employment land that has been permitted or has become available within two years of adoption. It was found that almost 90% of the annual / interim monitoring target for the first two years had already been met by this time.

For the fifth AMR period², covering 1st April 2019 to 31st March 2020, further land on employment allocations received planning permission for employment activities – amounting to 1.10Ha. Combining this with the total amount of land already with planning permission or available for development, the figure rises to 31.86Ha.

² It must be noted that the requirement for the publication of an AMR was not necessary during 2020 due to the disruption caused by the Covid-19 pandemic. However, the necessary data monitoring was undertaken.

The monitoring target set out in the LDP (25% of employment land allocated by Policy SP7 either attains planning permission or is available for development within the first 2 years of the Plan after adoption) was met within AMR 2 in 2017 (taking into account the additional variance of 20% under the target to allow for flexibility). The further land take up during the period for the fourth AMR is evidence of the continued deliverability of the sites allocated for employment use in the LDP.

In conclusion, clear progress has been made towards delivering the land allocated for employment within the current adopted LDP. Further monitoring and reporting in subsequent AMRs will continue in conjunction with the Review process. Occupancy rates for developed employment land will also continue to be monitored as part of the ELR process which will run alongside the AMR.

4.3 PROPOSED EMPLOYMENT SITES – REVISED DEPOSIT LDP:

As highlighted above, the figures in appendix 1 reflect the changes brought about through preparation of the Deposit Revised Plan. Consequently, the overall site allocation figure has been reduced from 111.13Ha (in the current LDP) to the 77.93ha allocated in the Deposit Revised Plan. Of the total allocated figure, it was noted in the Deposit Revised Plan that 15.98ha had obtained planning permission (either in the 2019 reporting period, or through extant permissions). This figure increased to 16.18ha (when including the areas covered by planning permissions in the 2020 reporting period (see appendix 1).

4.4 CHANGES WITHIN EXISTING EMPLOYMENT SITES – CURRENT LDP

Planning permissions on existing employment sites (as annotated in the current LDP) were monitored as part of this Review. In total since the adoption of the Plan in December 2014, planning permissions have been granted on 9.67 hectares³ of land within such locations. The permissions relate to the following, with changes of use being the most common:

- Change of Use (within same use class or a change from one use to another)
- Extensions to existing operations

³ N.B. typographical error in 2019 Study – should read 8.63ha not 8.43ha. The 9.67ha above builds on 8.63ha from 2019 in that planning permissions were granted on 1.05ha of existing employment sites.

- Demolition and replacement of existing buildings
- Re-development of brownfield land where the existing/original use has ceased

4.5 CHANGES WITHIN EXISTING EMPLOYMENT SITES – REVISED DEPOSIT LDP

As highlighted above, the figures in appendix 1 reflect the changes brought about through preparation of the Deposit Revised LDP, where an extensive re-assessment of the employment land situation was undertaken. Over the period since the adoption of the current LDP certain proposed employment allocations have been developed, and these have now been identified as existing employment land. The planning permissions are detailed in Appendix 1. Other reasons for the changes to the existing employment land situation in the Deposit Revised LDP include a reduction due to areas being declassified as existing employment due for example to dereliction or the change of use to non-employment uses. Conversely, other areas have seen increases to employment due to land being extended, for example an ancillary use such as storage associated with an existing business.

4.6 COMPARISON BETWEEN THE LATEST FIGURES AND THOSE OF THE ELR 2019

By comparing the figures set out in this Study with those of the ELR in 2019, we can see the changes that have occurred over the two year period. Whilst this is too early to establish whether there are any trends developing, it will nevertheless provide us with a snapshot of the current position, including an indication as to the extent of business turnaround and the continuing importance of the sizeable total area of existing employment sites within the County.

A note of caution must be emphasised however. The employment land review is an evolving process and new data becomes available each year, which might have not been available or known in previous years. This caveat must be taken into account when direct comparisons between successive reviews are being made and is particularly relevant when viewing and comparing the data contained within ELRs produced prior to 2019, as the figures for the 2020 ELR (and the one produced in 2019) included the changes brought about as part of the Review of the LDP.

Graphs setting out the changes between 2019 and 2020 are set out in Appendix 2. The graphs are based on the following:

1. Total site area and total area of buildings/enclosures
2. Total area of buildings / enclosures and proportion vacant or not in use
3. Proportion of Use Class B1, B2, B8 (%)

Generally the graphs indicate the relatively low level of site area taken up by buildings and enclosures in relation to overall site areas, with a considerable amount of land being utilised as car parking space or as landscaping. However, some of this land is unsuitable for development due to factors such as topography or proximity to vulnerable uses.

The graphs show that there has not been much change over the period between the two review periods, although the detailed assessment of the County's existing employment land supply that was carried out as part of the preparation for the Deposit Revised LDP was continued for this 2020 employment land review which resulted in some of the changes between the two years. One example is Whitland which indicates changes in all three categories of graph above due to revisions to the employment land area in relation to the former Creamery.

Although there is very little change between the two years in terms of the proportion of B use classes on the employment sites, the results do show that the levels of B uses are not high in many settlements, particularly those in the lower tiers. The reason for this is often that large businesses of sui generis or A use class uses can dominate a particular site in certain localities. Whilst the lack of traditional B class employment uses on some sites might be considered as concerning, this is often an historical trend and moreover such uses are nevertheless often closely related to traditional B uses, and can make an important economic contribution to these areas both in terms of services and the provision of local jobs. Other reasons for the low level of B uses in some settlements is due to vacancy levels. Brynamman is an example, whose low level of B uses is skewed by the sizeable former Remploy Factory site. However, this site is currently undergoing redevelopment and should be back in B use in the near future.

4.7 PLANNING PERMISSIONS FOR EMPLOYMENT USES ON OTHER SITES

In addition to new employment related developments on proposed and existing LDP employment sites, interest has been shown on other areas of land. Some of these permissions are located within the development limits of settlements, while some lie adjacent and are often associated with a former use (brownfield land). Generally the permissions are

fairly small in size but cumulatively they amount to several hectares. In total since the adoption of the current LDP, these other sites take up 15.65 hectares of land (4.83ha during the ELR 2020 period). N.B this refers to take up in the current LDP (only 4.37ha of windfall was taken up in the revised plan due to changes to land allocations).

4.8 AREA-BASED RESULTS

Locations in the three Growth Areas of Carmarthen, Llanelli and Ammanford / Cross Hands make the biggest contributions to site area totals. This is because these areas have the highest concentrations of employment sites within the County, and have also been designated with the most employment allocations in the LDP due to their sustainable locations.

Table 1 below presents this information for 2019/ 2020

In order to draw comparison with previous ELRs, the settlement tiers in Table 1 remain as they are in the current LDP. However the take up rate reflects the amended site data (i.e proposed and existing employment land) as set out in the Revised Deposit LDP.

Table 1: Total area of employment land (Existing and Proposed), by LDP Tier, along with take up over the Plan period (up to 31 March 2020) (Totals rounded to the nearest Hectare)

Location	2019 Total Area	2019 (%)	Take up (Ha over Plan period)	% Take up
Growth Areas (Tier 1):				
Carmarthen	45.33	9	-	
Llanelli	226.97	43	-	
Ammanford / Cross Hands	148.85	28	-	
			25.71	61
Service Centres (Tier 2)	55.64	11	9.74	23
Local Service Centres (Tier 3)	33.69	7	4.42	11
Sustainable Communities (Tier 4)	12.99	2	2.26	5
Total for County	523	100	42	100

Figures for windfall sites have been included within the overall take up rates in each tier.

Please note that the total take up over the plan period is smaller than in the 2019 Review. This is due to the correction of an error in the previous year's figure.

5 ONGOING ISSUES AND RECOMMENDATIONS

5.1 DELIVERABILITY

At the time of the LDP Examination, concern was raised by the Inspector that a number of employment sites allocated in the UDP had not been developed. This led to a re-assessment of the allocations and the consequent reduction in overall area allocated for employment purposes. However, notwithstanding this reduction, evidence was produced for the Examination that showed the level of employment interest within the County and how this manifested itself through the allocation of sites. It was shown that some sites were being actively marketed, whilst others benefitted from supplementary planning guidance or masterplans. Furthermore, interest in several sites were evidenced by the fact that current planning permissions existed on all or parts of the allocations. All these factors offered a level of certainty in respect of the future deliverability of these particular allocations.

Deliverability will remain a key driver during preparation of the Revised LDP, and it will be the task of the AMRs and the ELRs, as well as pieces of work such as the Employment Sectoral Need Study, and the more recent Two County Economic Study (in conjunction with Pembrokeshire County Council) to provide the evidence in respect of the levels of activity and take up of employment allocations and employment land in general.

The adopted LDP allocates 111.13 ha of land for employment purposes. The above sections indicate the progress that has been made so far in delivering the sites. As shown, some sites already benefit from planning permission and are therefore commitments. Whilst the interest shown in such sites is encouraging, a detailed assessment was carried out into the deliverability of employment sites as part of preparation of the Deposit Revised LDP. As noted above this has resulted in a reduction of proposed employment allocations to 77.93ha of land. Coupled with the allocations, ongoing interest and activity continues to take place on the County's extensive amount of existing employment sites; this is generally related to the expansion of an existing business, demolition and rebuilds, or the turnover of old businesses and their replacement with new enterprises.

5.2 THE EMPLOYMENT SECTORAL NEED STUDY

Consultants WSP were commissioned to undertake an Employment Sectoral Study for the County in 2017. This reflects the commitment to continually review the evidence in support of

the LDP, and other corporate documents and strategies. The findings set out within the Study provided additional evidence as part of the monitoring and review of the LDP.

The Study highlighted that although a substantial amount of land was allocated to new employment use in the LDP, the extent to which this has been taken up in recent years – both through planning permissions and actual development – means that without a renewed supply of additional employment land in the following LDP period, the full potential for employment will be severely constrained. In this respect reference is also made to the other important indicators, not least the signing and content of the Swansea Bay City Deal and the Council's own regeneration strategy.

5.3 THE REVISED LDP

The employment land reviews (and AMRs), as well as pieces of evidence such as the Employment Sectoral Need Study have been utilised in the preparation of the Revised LDP. These pieces of evidence provided not only an up to date record of 'take up' and turnover of employment land within the County, but also identified whether current LDP employment allocations are deliverable.

In light of the latest Welsh Government planning advice *Planning Guidance on Building an Economic Development Evidence Base to Support a Local Development Plan*, joint working with our corporate partners in the Economic Development and Corporate Property Divisions is ongoing in respect of the exchange of information and building a robust evidence base on all aspects of employment for use by all concerned. This information has been essential in helping to identify the most appropriate locations on which to allocate land for employment purposes based on economic need, and appropriateness in spatial planning terms.

5.4 LARGER THAN LOCAL ECONOMIC STUDIES - THE TWO COUNTY ECONOMIC STUDY FOR CARMARTHENSHIRE AND PEMBROKESHIRE

National planning policy advises that data should be collected at 2 levels - local and larger than local. Carmarthenshire has already begun the process at the local level through this, and the three previous ELRs.

Larger than local studies remove administrative boundaries and look at other factors, such as travel to work areas. A larger than local study would be advantageous to those authorities, like Carmarthenshire, that have commenced their LDP review. Such studies are advised to follow the Welsh Government 6 step process set out within *Practice Guidance – Building and Economic Development Evidence Base to Support a Local Development Plan*. The Guidance emphasises that the work would help individual authorities with their LDP reviews and evidence base, but may also be helpful to the Welsh Government in building on the work completed in North Wales to give a better picture across Wales, and to tie in with the National Development Framework (NDF).

Consequently as part of the preparation of their Revised LDPs, Carmarthenshire engaged in discussions with Pembrokeshire County Council (as well as the two National Park Authorities within their boundaries) and commissioned Arup to undertake a larger than local study for the Authorities concerned.

The purpose of the study is to ultimately provide a basis on which to plan future provision of strategic land and premises for economic activities across Carmarthenshire and Pembrokeshire. By drawing on statistical analysis, a detailed literature review of existing initiatives within the area and anecdotal evidence provided through engagement with market agents and key businesses, the Strategy seeks to determine whether there is a current mismatch between supply of strategic employment land and demand, whilst also making wider recommendations in relation to positive interventions that could help support economic growth.

Findings from the Study show that whilst projected employment land demand across the area is low (with Brexit forecasts representing declines in most sectors for the area), there is latent market confidence, willingness of indigenous businesses to remain and grow, and desire by stakeholders to preserve locational advantages and strategic assets for future growth. In addition, existing initiatives in the area (such as the City Deal) could be viewed as support for a positive growth outlook.

Other findings and recommendations are that the larger than local area should therefore focus on maximising its strengths and existing assets, whilst seeking solutions to work collaboratively to reduce or overcome the value gap which can be a restriction on development / investment. The area should seek protection of strategic assets in order that their benefit for the area can be maximised, alongside proactively planning for strategic sites where demand is high.

The Larger than Local study develops interventions which emerge from the rapid baseline review, anecdotal information provided by stakeholders, and initiatives outlined within the literature review. Interventions which will likely inform the economic vision at a larger-than local level, and criteria-based policies within respective LDPs, are focussed on nine broad topics. Going forward, the Larger than Local planning authorities should develop, agree and maintain a system of tracking these interventions, agreeing relevant performance indicators to demonstrate progress and consider these in both policy development and the assessment of applications.

Further work is being undertaken later in 2020 by Arup into the economic impacts of Brexit upon the larger than local area. The results from these findings will be incorporated into future employment land reviews and will form part of the evidence base for the revised LDP as it progresses towards examination.

5.5 THE COVID-19 PANDEMIC

The Covid-19 lockdown commenced towards the end of the reporting period for this ELR (March 2020). It is too early to anticipate the effects of this pandemic upon the local economy and employment land supply. This will be addressed in future reviews and will be closely aligned with measures proposed both nationally and at the local level so as to ensure that the economic recovery is both swift and sustainable. In terms of the larger than local study, it would be beneficial to have the effects of the pandemic assessed in combination with the planned work on the implications of Brexit.

6 CONCLUSIONS

This is the fifth Employment Land Review (ELR), which has continued to build upon the data collected as part of the LDP annual monitoring reports (AMRs), as well as the site based surveys that are collected each spring. The first three ELRs were concerned solely with the current adopted LDP. However, this Review has been produced in conjunction with the revision of the LDP that commenced during 2018 in accordance with the Delivery Agreement for the preparation of the Revised (Replacement) LDP, agreed by the Welsh Government on the 28th June 2018.

In light of the Review, during the latter part of 2018 and early part of 2019, an extensive re-assessment was carried out on both the employment allocations in the current adopted LDP as well as the existing employment sites. Coupled with this, other pieces of evidence were in the process of being produced, most notably the Two County Economic Study, which were utilised in both the production of the LDP Review as well as the fourth ELR (2019). Some further changes came about as part of the production of this, the fifth ELR

In light of the advanced stage of production of the Revised LDP (the Deposit version was published for public consultation in February 2020), the evidence has been included in the fourth and fifth ELRs, including the revisions to the employment allocations, which are set out in Appendix 1 as they appear in the Deposit Revised LDP. However in the interests of clarity, and in order to compare the results with those of previous ELRs, the settlement tiers (which have been subject to amendment in the Revised Deposit LDP) have been set out as they appear in the current adopted LDP. Further clarification, analysis and comparisons will be set out within other background evidence that will be produced prior to submission of the Revised Plan to the Welsh Government for Examination.

Appendix 1 Sizes and take-up rates of all existing and proposed employment sites

Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission refs (during LDP preparation & post-LDP adoption)	Size of area taken up by planning permissions (Ha) during Plan Period (allocations)	Size of area taken up by planning permissions (Ha) during Plan Period (existing sites)
Principal Centres (Tier 1)									
PrC1 Carmarthen									
Mekatek	4.29	1.48	2.81	0	0.41	72			
Cillefwr	20.03	4.39	15.64	0.35	1.92	49	W/31332; W/38792		0.18
Feed Mill	1.88	0.48	1.40	0	0	100			
Total (existing)	26.19	6.35	19.85	0.35	2.33	58			0.18
Cillefwr PrC1/E1	4.62						W/35655	0.56	
West Carmarthen PrC1/MU1	4.53								
Pibwrlwyd PrC1/MU2	8.95						W/36830; W/38877	0.58	
Yr Egin PrC1/SS1	1.04						W/34228	1.04	
Total (proposed)	19.14							2.18	
PrC2 Llanelli									
Dafen	67.16	20.30	46.86	1.71	1.89	82	S/38483; S/39804		0.23
Trostre	65.98	14.22	51.76	0.08	1.92	86	S/30376; S/30377; S/33614; S/38307		0.7
Delta Lakes	3.87	0.71	3.16	0.02	0.15	77			
Bynea	33.14	8.18	24.96	0.12	1.59	79			
North Dock	1.64	0.45	1.19	0.18	0.01	56			
AMG Resources (including scrap yard)	9.14	0.79	8.35	0	0	100			
Parc y Plant	2.53	0.15	2.38	0	0	100			
Llanelli Workshops	0.89	0.31	0.58	0	0	99			
100 Trostre Road	1.39	0.37	1.02	0.11	0	71			
Depot, Heol Y Parc	1.24	0.34	0.9	0	0.03	92			
Trosserch Road	20.78	5.60	15.18	0.32	0.25	90			
Riverside Industrial Park	3.45	0.94	2.51	0	0.18	80			
Total (existing)	211.20	52.36	158.85	2.54	6.02	84			0.93
North Dock PrC2/E1	0.84								
Dafen PrC2/E2	14.93								
Total (proposed)	15.77								

Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission refs (during LDP preparation & post-LDP adoption)	Size of area taken up by planning permissions (Ha) during Plan Period (allocations)	Size of area taken up by planning permissions (Ha) during Plan Period (existing sites)
PrC3 Ammanford / Cross Hands									
Heol Parc Mawr (inc. Cross Hands Business Centre & Workshops)	8.05	1.79	6.26	0.02	0.38	65	S/30672; E/35920; E/37324		0.31
Cross Hands West Food Park GA3/E8	12.92	3.21	9.71	0	0	100			
Parc Menter	5.12	0.82	4.30	0	0.07	91	S/22280; S/27072		1.53
Gorslas Industrial Estate	1.59	0.28	1.31	0	0.12	56	W/36179		0.3
Capel Hendre Industrial Estate	17.11	3.44	13.67	0.09	0.22	91	E/30404; E/33556; E/34847		0.73
Parc Hendre	13.08	3.94	9.14	0	0	100	E/37602		0.06
Lyndsey Drift Mine	1.22	0.10	1.12	0	0	100			
Parc Amanwy	6.57	1.48	5.09	0.01	0.12	91	E/37312		0.07
Foundry Road	2.61	0.61	2.0	0.02	0.41	30			
Betws Industrial Estate	3.21	0.36	2.85	0	0	100			
Maesquarre Road (Ref. MQ1 & MQ2)	0.21	0.072	0.14	0.02	0	71			
Betws Parc Workshops	1.32	0.23	1.09	0.03	0	88	E/40089		0.014
Dyffryn Road	4.21	1.62	2.59	0.01	1.03	35			
Pantyyffnon	2.07	0.34	1.73	0	0	100			
Pentwyn Road	3.89	0.39	3.50	0.03	0	92			
Former Betws Colliery	5.70	0.36	5.34	0	0.15	59			
Land North of Penybanc Road	3.66	0.71	2.95	0.49	0.18	5			
Heol Ddu, Tycroes	5.06	0.68	4.38	0	0	100			
Cilyrychen & Pantyrhodyn Industrial Estates	15.78	5.16	10.62	0	0.28	95	E/39760		0.064
Total (existing)	113.37	25.59	87.78	0.72	2.96	86			3.078
Cross Hands East PrC3/E1	8.7						S/28449	8.7	
Cross Hands West Food Park PrC3/E2	7.31								
Cross Hands Business Park PrC3/E3	4.73								
Meadows Road, Cross Hands PrC3/E4	1.09								
Parc Menter, Cross Hands PrC3/E5	0.09								
Capel Hendre Industrial Estate PrC3/E6	2.88						E/27773	0.44	
Parc Hendre PrC3/E7	9.86						E/37602	0.73	
Cilyrychen Industrial Estate PrC3/E8	0.82								
Total (proposed)	35.48							9.87	

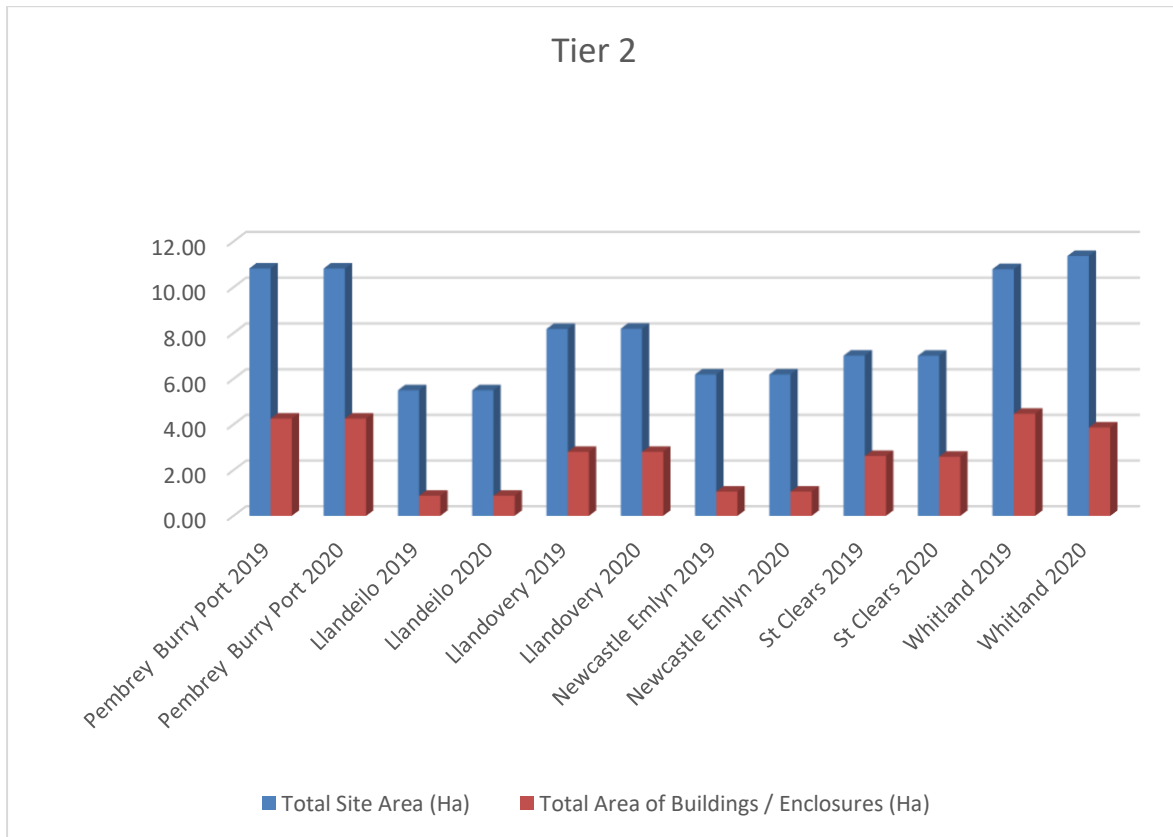
Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission refs (during LDP preparation & post-LDP adoption)	Size of area taken up by planning permissions (Ha) during Plan Period (allocations)	Size of area taken up by planning permissions (Ha) during Plan Period (existing sites)
Service Centres - Tier 2									
Burry Port SeC4									
Parson's Pickles	2.81	0.32	2.49	0	0	100			
Industrial Estate Silver Terrace	0.83	0.32	0.51	0	0.09	71			
Burry Port Industrial Estate	0.81	0.23	0.58	0	0	100			
Llanelli Sand	2.63	2.63	0.00	0	0	100			
Dyfatty	2.24	0.34	1.90	0.01	0	97			
Pembrey Industrial Estate	1.51	0.42	1.09	0	0.24	43			
Total (existing)	10.82	4.26	6.56	0.01	0.33	92			
Dyfatty SeC4/E1	3.28						LL/02604	3.28	
Total (proposed)	3.28							3.28	
Llandeilo SeC16									
Beechwood Industrial Estate	2.40	0.30	2.10	0	0.23	25	E/33880; E/34801; E/36028		0.19
Station Road	2.02	0.36	1.66	0	0.29	21	E/34448		0.07
Ffairfach Mart	1.08	0.22	0.86	0	0.22	0			
Total (existing)	5.50	0.88	4.62	0	0.74	16			0.26
Beechwood Industrial Estate SeC16/MU1 & SeC16/E1	1.25						E/33059	0.25	
Former Market Hall, Llandeilo SeC16/E2	0.2						E/39454	0.2	
Total (proposed)	1.45							0.45	
Llandovery SeC15									
Church Bank & Former Sawmills	7.20	2.67	4.53	0.27	0.92	55			
Depot SW of Ysgol Pantycelyn	0.99	0.13	0.86	0	0	100			
Total (existing)	8.19	2.8	5.39	0.27	0.92	58			
Newcastle Emllyn SeC12									
Station Road	1.72	0.13	1.59	0	0.06	53			
Builders Merchant/Timber Yard	1.07	0.2	0.87	0	0.2	0			
Aberarad	3.41	0.73	2.68	0	0	100	W/33814		0.01
Total (existing)	6.19	1.06	5.13	0	0.26	75			0.01
St Clears SeC18									
Station Yard	1.03	0.45	0.58	0	0.12	73	W/32941; W/33637; W/36134		0.81
Station Road	2.40	0.79	1.61	0.13	0.29	47	W/38617; W/38847		0.55
Wembley Place	0.75	0.33	0.42	0	0.06	82			
St Clears Business Park	0.81	0.16	0.65	0.01	0.06	60			
Depot Opposite Gardde Fields	0.58	0.21	0.37	0	0.21	0			
Land adj A40	1.44	0.65	0.79	0	0.48	25	W/20735; W/32747; W/34779		1.16
Total (existing)	7.01	2.59	4.43	0.14	1.22	47			2.54
St Clears Business Park SeC18/E1	0.44								
Total (proposed)	0.44								

Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission refs (during LDP preparation & post-LDP adoption)	Size of area taken up by planning permissions (Ha) during Plan Period (allocations)	Size of area taken up by planning permissions (Ha) during Plan Period (existing sites)
Whitland SeC19									
West Street (North)	0.62	0.22	0.40	0	0.1	55	W/24918; W/38418		0.27
Station Road West (Builder's Yard)	1.11	0.19	0.92	0	0.19	0			
Wynn Phillips Truck Centre (Depot)	0.19	0.06	0.13	0	0.06	0	W/32606		0.35
Station Road East (Former Coal Yard)	0.58	0.04	0.54	0	0.04	0			
Trevaughan	2.17	1.24	0.93	0	0.19	84			
Whitland Industrial Estate	3.37	0.53	2.84	0.02	0.15	68	W/30784		0.57
Whitland Creamery	3.33	1.59	1.74	0	0.76	52			
Total (existing)	11.37	3.87	7.50	0.02	1.49	61			1.19
Whitland Industrial Estate SeC19/E1	0.49								
Land south of Former Creamery SeC19/E2	1.48								
Total (proposed)	1.97								
Local Service Centres - Tier 3									
Kidwelly SeC3									
Industrial Estate Pembrey Road	2.43	0.86	1.57	0	0.13	85			
Industrial Estate Pembrey Road (East)	2.43	0.22	2.21	0	0.2	12	S/33928		0.35
Total (existing)	4.86	1.08	3.78	0	0.33	69			0.35
Ponthenri SeC1									
Ponthenri Industrial Estate (existing)	3.05	0.62	2.43	0	0.02	97			
Pontyberem SeC11									
Coalbrook Road (existing)	0.91	0.26	0.65	0	0.15	42			
Hendy SeC6									
Industrial Estate (existing)	3.97	1.39	2.58	0.13	0.21	76			
Glanamman / Garnant SeC10									
Land at Station Road	1.79	0.24	1.55	0	0.13	45			
Old Coal Yard, Heol Dwr	2.79	0.08	2.71	0	0.04	53	E/30381		0.08
Raven Industrial Estate	0.97	0.16	0.81	0.02	0.02	72			
Glanamman Workshops	1.23	0.3	0.93	0.27	0	11			
Total (existing)	6.78	0.78	6	0.29	0.19	38			0.08
Brynamman SeC9									
Brynamman Industrial Estate, Cwmgarw Road	0.29	0.04	0.25	0	0.01	77			
Old Remploy Factory, Cwmgarw Road	0.82	0.17	0.65	0.17	0	0	E/36279		0.78
Total (existing)	1.11	0.21	0.90	0.17	0.01	14			0.78

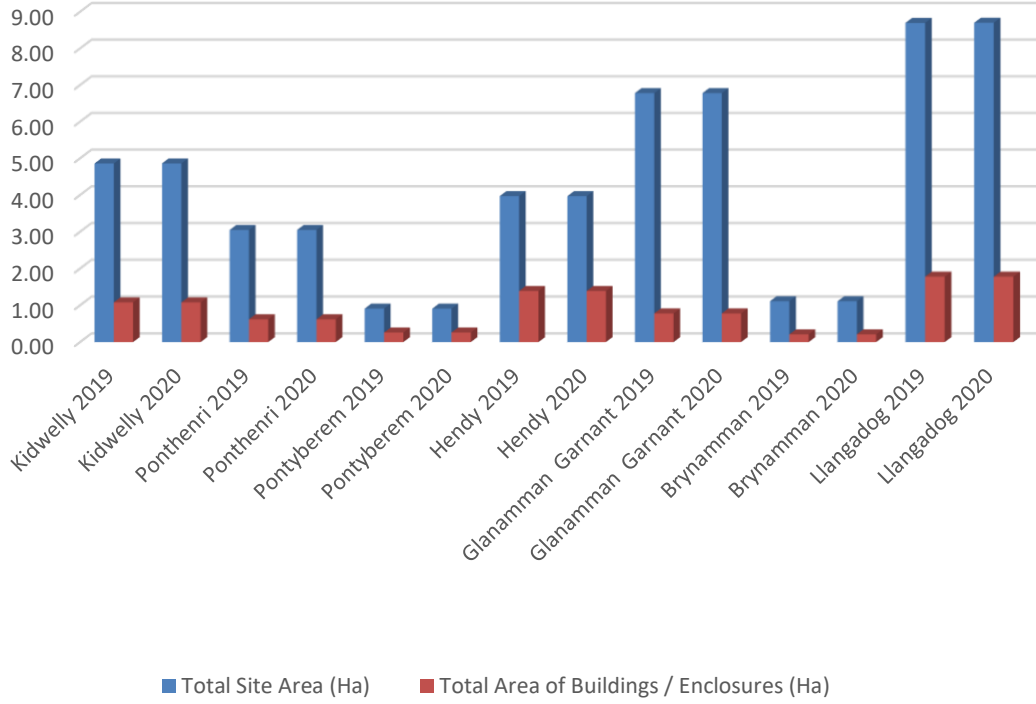
Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission refs (during LDP preparation & post-LDP adoption)	Size of area taken up by planning permissions (Ha) during Plan Period (allocations)	Size of area taken up by planning permissions (Ha) during Plan Period (existing sites)
Llangadog SeC17									
Former Creamery	4.15	1.13	3.02	0	0	100			
Station Road (North)	1.21	0.39	0.82	0	0	100			
Station Road	3.33	0.26	3.07	0	0.18	30	E/32491		1.6
Total (existing)	8.70	1.78	6.92	0	0.18	90			1.6
Llanybydder SeC13									
Abattoir / Timber Yard	3.12	0.85	2.27	0	0.03	97			
Old Foundry (Telephone Exchange)	0.41	0.07	0.34	0	0.07	0			
Ty Mawr	0.40	0.12	0.28	0	0	100			
Total (existing)	3.93	1.04	2.89	0	0.1	90			
Old Foundry SeC13/E1 (proposed)	0.4						W/38609	0.4	
Sustainable Communities - Tier 4									
Pencader SeC14									
Station Road	2.07	0.07	2	0.02	0.05	0			
B4459	1.03	0.13	0.90	0.08	0.02	20			
Clos cader	0.85	0.21	0.64	0	0.02	91			
Total (existing)	3.95	0.41	3.54	0.1	0.09	54			
New Inn SuV43									
Scrap Yard & Engineering Works	0.40	0.05	0.35	0	0	100			
Adj Gwastod Abbot	1.44	0.67	0.77	0	0.2	70			
Total (existing)	1.84	0.72	1.12	0	0.2	72			
Llanfihangel - ar- arth SuV39									
Western Power etc (existing)	1.37	0.16	1.21	0	0.1	38			
Pontwelly SuV41									
Station Road	1.38	0.23	1.15	0	0.19	16			
Lewis Street	1.14	0.16	0.98	0	0.08	50			
Estate adj B4624	0.67	0.13	0.54	0	0.02	87			
Total (existing)	3.19	0.52	2.67	0	0.29	44			
Cwmgwili SuV28									
Heathfield Industrial Estate (existing)	2.66	0.24	2.42	0	0.03	88			
Grand Total (existing sites)	446.17	108.97	337.20	4.74	18.17	79			11.00
Grand Total (proposed sites in Deposit Revised LDP)	77.93							16.18	

Appendix 2 Comparison between existing employment sites in 2019 and 2020

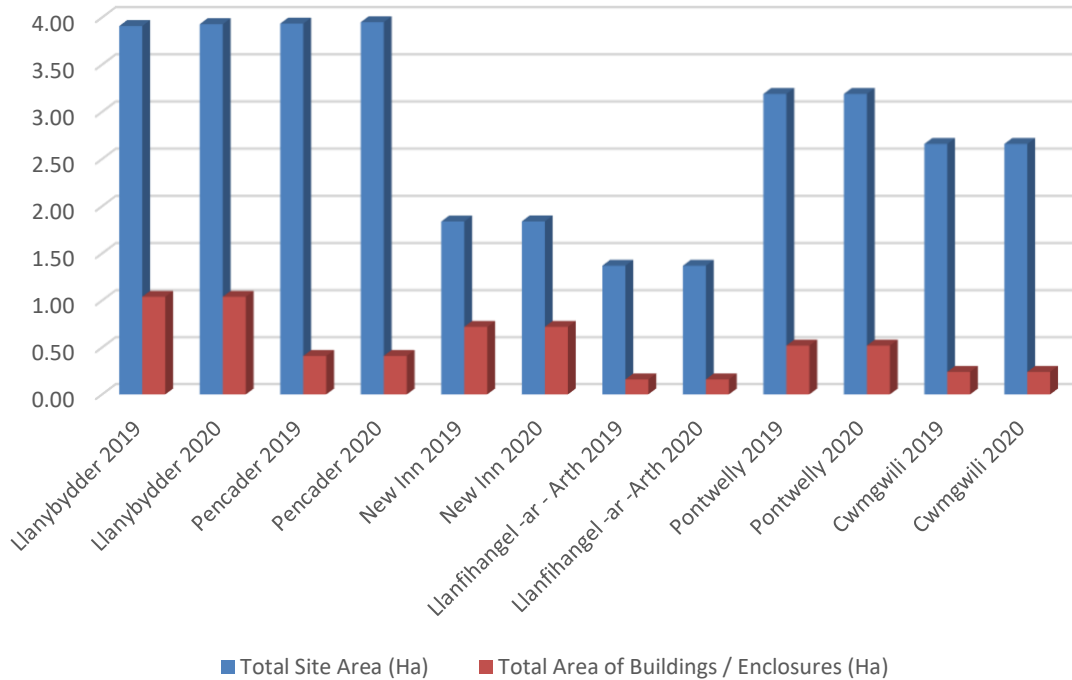
1. Total site area and total area of buildings/enclosures



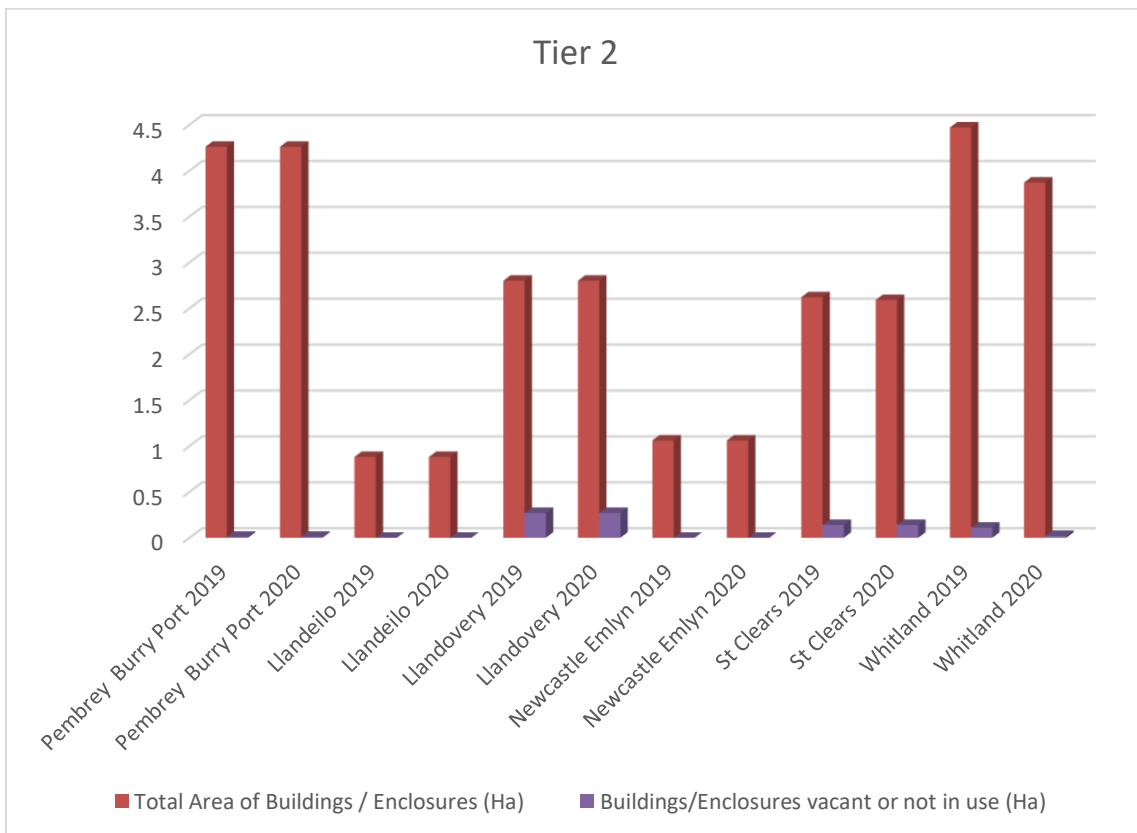
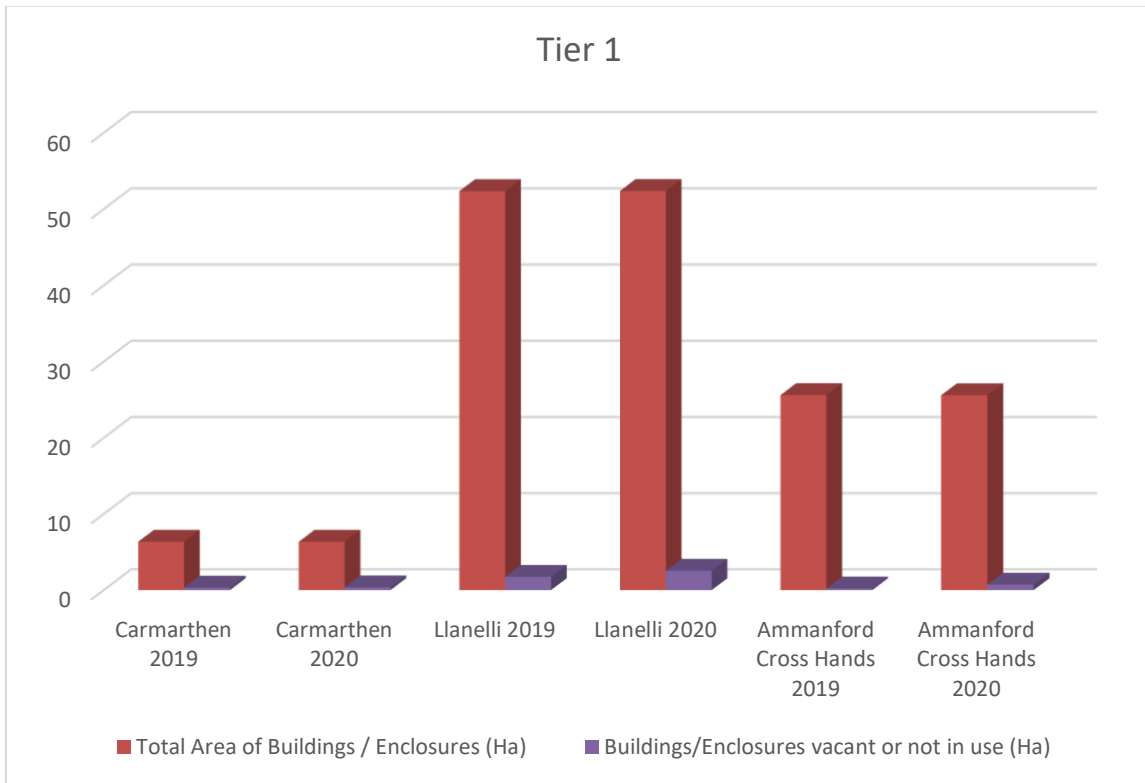
Tier 3

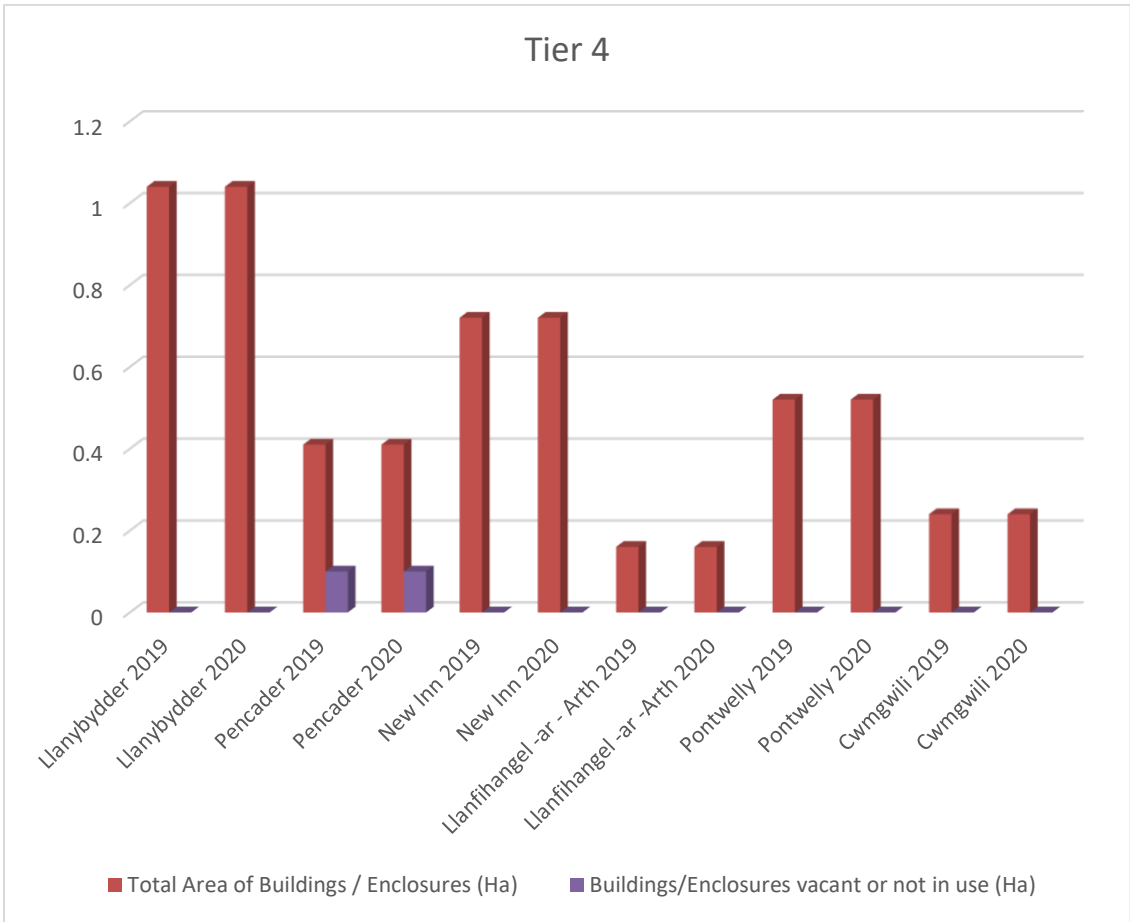
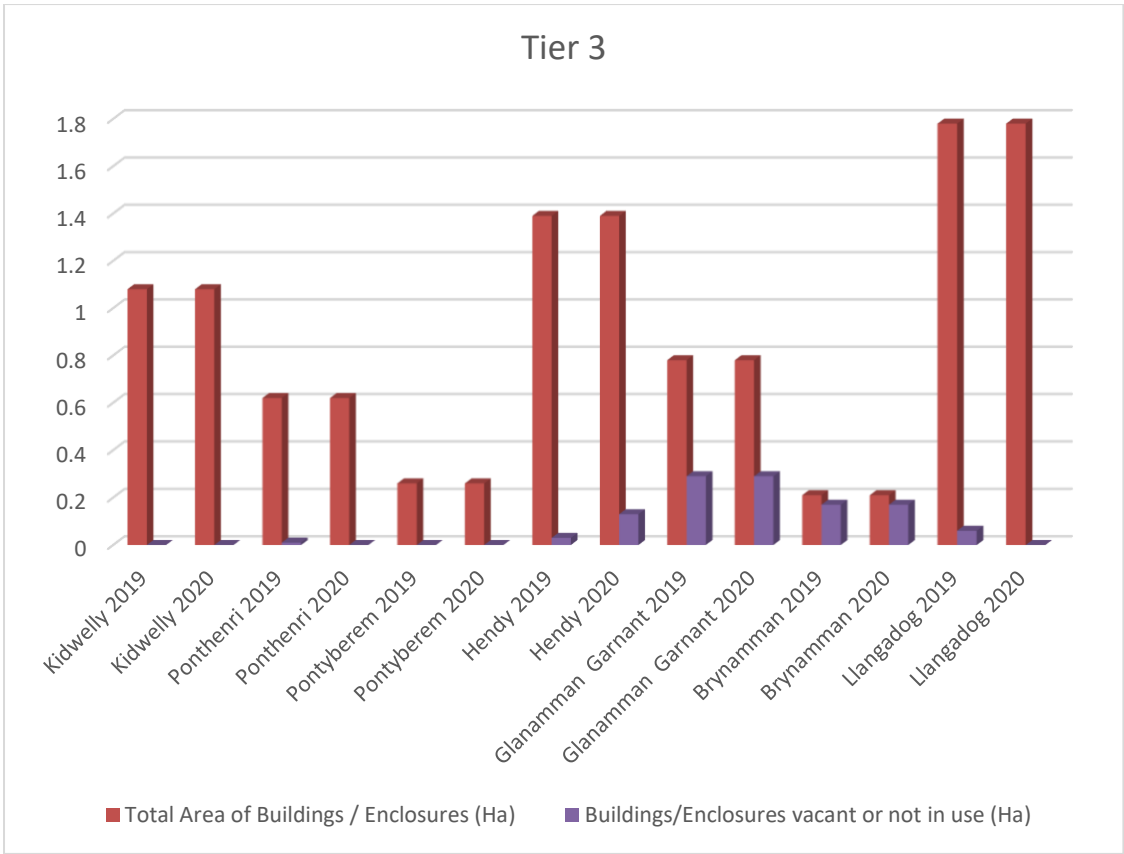


Tier 4



2. Total area of buildings / enclosures and proportion vacant or not in use





3. Proportion of Use Class B1, B2, B8 (%)

