

**Carmarthenshire
Local Development Plan**

**Employment Land
Review**

2022

Cyngor **Sir Gâr**
Carmarthenshire
County Council



Contents

1	Background	1
2	Introduction	2
3	Study Methodology.....	3
4	The results.....	5
4.1	Existing employment sites	5
4.2	Proposed Employment Sites – current LDP:	6
4.3	Proposed Employment Sites – Revised Deposit LDP:	8
4.4	Changes within existing employment sites – current LDP.....	8
4.5	Changes within existing employment sites – Revised Deposit LDP.....	8
4.6	Comparison between the latest figures and those of the ELR 2020	9
4.7	Planning permissions for employment uses on other sites.....	10
4.8	Area-based results	11
5	Ongoing Issues and Recommendations.....	11
5.1	Deliverability	11
5.2	The Employment Sectoral Need Study	12
5.3	The Revised LDP	13
5.4	Larger than local economic studies - The Two County Economic Study for Pembrokeshire and Carmarthenshire	13
5.5	Other Pieces of evidence	16
6	Conclusions	16
	Appendix 1	18
	Appendix 2	24

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 (LDP) 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. An outline of the economic implications of the pandemic, as well as that of Brexit, have been explored in the Two County Economic Study for Pembrokeshire and Carmarthenshire (update 2020/21) and are summarised in Section 5.4 below.

2 INTRODUCTION

Evidence from this sixth Employment Land Review (ELR) will be used to provide evidence to support the Annual Monitoring Reports (AMRs) of the LDP and will contribute 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), like the previous ELR (2020) this ELR utilised the extensive revision work carried out as part of the [First] Deposit Revised Plan. Consequently, the figures set out within this ELR mirror those set out within the First Deposit, whilst also covering the monitoring of the current adopted 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. This is in accordance with 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 2021 to 31 March 2022. Site surveys are carried out towards the end of this period to ensure the most up to date information. Planning permissions for the whole period are collected and utilised in the update.

It should be noted that due to Covid-19 restrictions, it was not possible to carry out the necessary site surveys for the period 2020-21 and consequently no review was produced for that year. However, planning permissions for the 2020-21 period have been captured and noted in Appendix 1, along with those for the 2021-22 period.

Furthermore, due to the disruption caused by the Covid-19 pandemic [followed by the publication in January 2021 of guidelines concerning phosphate levels in riverine Special Areas of Conservation (SACs)], a sizeable time delay has consequently resulted in the production of the Revised LDP. The Deposit Revised LDP was originally published for public consultation in 2020, however due to the aforementioned factors it has been necessary to commence preparation of a Second Deposit LDP (anticipated to be published for consultation in January 2023).

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. For the purposes of this ELR, information on the sites set out in the [First] Deposit (2020) have been used as this represents the most up to date information at the time. Information relating to the proposed allocations (as well as the existing employment sites) in the Second Deposit Revised LDP is evolving and as stated above this version of the Plan has yet to be published. Information from the Second Deposit will be incorporated into the 2023 ELR that will be submitted to the Welsh Government for Examination in 2023 as part of the evidence base for the Revised LDP.

Information on the existing sites is not covered in the LDP AMRs as these do not form part of the proposed employment portfolio over the Plan period. The 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 within the above two categories

In total, 108 sites (including both LDP allocations and existing sites) were surveyed for the 2022 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 (e.g. steep or sloping ground)
- 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 2021/22 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 [First] Deposit Revised LDP, where a full review was carried out and a greater level of analysis was undertaken in respect of the individual sites, than had previously been done for earlier ELRs. 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 2022 was 447 Ha

Within the total site area, buildings / enclosures in use (both for employment purposes - B1, B2, B8 and other uses) in 2022 covered 117 Ha.

Of this, buildings / enclosures in use for employment purposes (B1, B2, B8) amounted to 95 Ha (81%).

Those in use for non-B Use Classes covered 20 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 –14Ha).
- Other (A,C,D)– 6Ha.

The area within sites for use in infrastructure (inc. Car parking / landscaping / areas too difficult to develop) amounted to 329 Ha.

'Vacant land' i.e. buildings/enclosures vacant or not in use in 2022 was nearly 2 Ha.

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

- Buildings/enclosures for employment use (B1,B2,B8) – 21%.
- Buildings/enclosures for non B use – 4%.
- Area in use for infrastructure/landscaping or too difficult to develop – 74%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:

- Buildings/enclosures for employment use (B1,B2,B8) – 81%.
- Buildings/enclosures for non B use – 17%.
- Vacant buildings/enclosures – 2%.

The following section sets out the changes that have occurred to the employment land (both proposed and existing) during the 2020-22 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 included for information purposes. With regard to the comparison with previous years data (namely ELR 2020), the figures from the review process for the [First] Deposit Revised LDP 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:

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

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 sixth AMR period, covering 1st April 2021 to 31st March 2022, further land on employment allocations received planning permission for employment activities – amounting to 1.90Ha.² Combining this with the total amount of land already with planning permission or available for development, the figure rises to 33.76Ha.

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 sixth 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.

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.

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 [First] 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 [First] Deposit Revised Plan (reduced to 76.38ha after the Focussed Changes). 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 earlier extant permissions). This figure increased to 18.08ha after areas covered by planning permissions in the 2020-22 reporting period were added (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 11.75ha³ – the total figure for the latest monitoring period (April 2020 – 31 March 2022) is 2.08ha. 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
- 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 [First] 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 parts of some proposed employment allocations have been developed, and these were identified as existing employment land in the First Deposit. The planning permissions are detailed in Appendix 1. Other reasons for the changes to the existing

³ N.B. The 11.75ha above builds on the 9.67ha from the 2020 Review in that planning permissions were granted on 2.08ha of existing employment sites.

employment land situation in the First Deposit 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. The figure of 13.13ha set out in Appendix 1 covers the permissions over the period from the adoption of the first LDP to the end of March 2022.

4.6 COMPARISON BETWEEN THE LATEST FIGURES AND THOSE OF THE ELR 2020

By comparing the figures set out in this Study with those of the ELR in 2020, 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 annual 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 2019 ELR (and the two subsequent reviews) included the changes brought about as part of the Review of the LDP.

Graphs setting out the changes between 2020 and 2022 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 been very little change over the time between the two review periods. The detailed assessment of the County's existing employment land supply had already been carried out as part of the preparation for the [First] Deposit Revised LDP, and this had been accounted for in the 2020 ELR. As highlighted above, preparation is currently being progressed into the Second Deposit and this will again involve an assessment of the existing employment sites to ensure that the Plan contains the most up to date information. A comparison between the employment land situation in 2022 and 2023 will be undertaken in the 2023 ELR and this will account for any differences that might come about as part of the assessment of employment sites in the preparation of the Second Deposit.

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 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. After being vacant for a number of years, the site has undergone redevelopment and is now in sui generis use. Conversely, there has been a small rise in B class uses in Glanamman/Garnant shown in the 2022 study, with the redevelopment of new units in Glanamman Workshops, Tabernacle Road.

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 'windfall' sites take up 20.36ha of land (4.71ha during the ELR 2020-22 period). N.B this refers to take up in the current LDP (only 19.99ha of windfall

sites were taken up in relation to the [First] Deposit 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 the Plan period (up to 31 March 2022).

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 [First] Deposit Revised 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 2022) (Totals rounded to the nearest Hectare)

Location	2022 Total Area	2022 (%)	Take up (Ha over Plan period)	% Take up
Growth Areas (Tier 1):				
Carmarthen	45.33	9	-	
Llanelli	227.47	43	-	
Ammanford / Cross Hands	145.22	28	-	
			31.74	64
Service Centres (Tier 2)	58.14	11	10.04	20
Local Service Centres (Tier 3)	34.01	7	5.46	11
Sustainable Communities (Tier 4)	12.99	2	2.66	5
Total for County	523	100	50	100

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

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 other pieces of work such as the commissioned 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 [First] Deposit Revised LDP. As noted above, this has resulted in a reduction of proposed employment allocations to 76.38ha 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 of the County Council 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 subsequent revised 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.

This study represented a snapshot in time (prior to Brexit and the Covid-19 pandemic) and has now largely been superseded by further work such as the Two County Economic Study for Pembrokeshire and Carmarthenshire (see below).

5.3 THE REVISED LDP

The employment land reviews (and AMRs), as well as pieces of evidence such as the commissioned Studies were utilised in the preparation of the [First] 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. As stated above, it has been necessary to undertake a Second Deposit Revised LDP; this will build upon the work carried out as part of the First Deposit. The ELR for 2023 will be prepared utilising the further revisions set out within the Second Deposit, and will be submitted with the Revised Plan to the Welsh Government for Examination in 2023.

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 PEMBROKESHIRE AND CARMARTHENSHIRE

National planning policy advises that data should be collected at 2 levels - local and larger than local. At the local level, Carmarthenshire continuously monitors its employment land situation through the annual AMRs and 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.

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

The purpose of the Study was 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 Study sought 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 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 Two County Study develops interventions which emerge from the rapid baseline review, anecdotal information provided by stakeholders, and initiatives outlined within the literature review. These interventions are focussed on nine broad topics which will help to inform the economic vision at a larger-than local level, as well as assisting in the formulation of the policies within the respective LDPs.

Further work was undertaken later in 2020-21 by Arup into the unprecedented economic 'shocks' of Brexit and Covid-19. The 2020-21 Update looked to 'test' the relevance and scale of change for each of the interventions and strategic site recommendations presented in the 2019 study. Some of the main findings included:

- There are clear threats arising from a rapidly changing economic context in 2020/2021 as a result of Brexit and the Covid-19 pandemic. The threats of each relate, in part, to a sense of prevailing uncertainty around what the future might look like.
- There are also clear opportunities for the Study Area which have emerged across the last year. For example, in relation to agriculture there is the opportunity to further promote sustainable land management, buoying the sector whilst contributing to environmental targets.
- There is a sense of 'entrepreneurialism' within the two county area as a result of the pandemic and this may lead to some growth in identified key sectors such as tourism and the creative industries.
- Over the longer term, the forecasts show that growth is predicted within accommodation and food services, public services and professional and other private services. Manufacturing employment is still forecast to experience overall decline over the long term, as is agriculture, forestry and fishing which was the case in 2019.
- It should also be noted that the forecasted land demand continues to reflect the geographical character of the two county area, which is orientated more towards sectors such as tourism, leisure and public services which don't historically lead to a large land demand.

The 2020-21 Update also set out the key messages arising in relation to each of the interventions (of the 2019 study), such as making the most of complementary sectoral strengths and exploring options to respond to sectoral demand, as well as responding directly to the results of Covid-19 whereby the need for strong coordination and business networks have been shown, and the potential long-term changes in the way people choose to live and work – which might perhaps enhance the 'lifestyle draw' of West Wales.

5.5 OTHER PIECES OF EVIDENCE

Carmarthenshire County Council has recently commissioned consultants Turleys to undertake a Housing and Economic Growth Study specifically to provide evidence which will feed into the preparation of the Second Deposit Revised LDP.

6 CONCLUSIONS

This is the sixth 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 and fifth ELRs (2019 & 2020).

In light of the advanced stage of production of the Revised LDP (the [First] Deposit version was published for public consultation in February 2020), the revised evidence has been included in the three most recent ELRs, including the revisions to the employment allocations, which are set out in Appendix 1 as they appear in the [First] Deposit version. However, in order to be able to compare the results with those of previous ELRs, the settlement tiers (which have been subject to amendment in the First Deposit) have been set out as they appear in the current adopted LDP.

Further clarification, analysis and comparisons will be set out within the Second Deposit Revised LDP which is currently being prepared and is due to be published for public consultation in early 2023. The Employment Land Review for the 2022/23 period will be produced taking into account the latest figures set out in the Second Deposit and will form

part of the background evidence accompanying the submission of the Revised LDP to the Welsh Government for Examination later in 2023.

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	PL/00519		0.05
Cillefwr	20.03	4.46	15.57	0.73	1.43	52	W/31332; W/38792 PL/03160; PL/03271		1.14
Feed Mill	1.88	0.48	1.40	0	0	100			
Total (existing)	26.19	6.42	19.77	0.73	1.84	60			1.19
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	67.2	21.41	45.79	0.21	2.13	89	S/38483; S/39804; PL/00766		0.25
Trostre	66.53	14.30	52.23	0.04	1.96	86	S/30376; S/30377; S/33614; S/38307; PL/00299; PL/01728		0.75
Delta Lakes	3.87	0.72	3.15	0.03	0.14	76			
Bynea	33.14	7.09	26.05	0.10	2.98	57	PL/01058		0.04
North Dock	1.64	0.87	0.77	0.11	0.51	29			
AMG Resources (including scrap yard)	9.14	0.1	9.04	0	0	100			
Parc y Plant	2.53	2.53	0	0	0	100			
Llanelli Workshops	0.80	0.31	0.49	0.02	0	94			
100 Trostre Road	1.39	0.37	1.01	0.08	0	80			
Depot, Heol Y Parc	1.24	0.26	0.98	0	0.05	79			
Trosserch Road	20.78	5.86	14.92	0	0.55	91			
Riverside Industrial Park	3.45	0.94	2.51	0	0.19	80			
Total (existing)	211.70	54.76	156.94	0.59	8.51	83			1.04
North Dock PrC2/E1	0.84								
Dafen PrC2/E2	14.93						PL/00839	1.90	
Total (proposed)	15.77							1.90	

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	1.85	6.20	0	0.37	80	S/30672; E/35920; E/37324		0.31
Cross Hands West Food Park GA3/E8	12.92	3.56	9.36	0	0	100			
Parc Menter	5.12	0.82	4.30	0.06	0.07	84	S/22280; S/27072		1.53
Gorslas Industrial Estate	1.59	0.28	1.31	0.05	0.09	51	W/36179		0.3
Capel Hendre Industrial Estate	17.11	3.38	13.73	0.05	0.42	86	E/30404; E/33556; E/34847		0.73
Parc Hendre	13.08	3.94	9.14	0	0	100	E/37602; PL/03226		0.08
Lyndsey Drift Mine	1.22	0.10	1.12	0	0	100			
Parc Amanwy	6.57	1.48	5.09	0.01	0.13	91	E/37312		0.07
Foundry Road	3.95	0.96	2.99	0	0.79	18			
Betws Parc Workshops	1.32	0.23	1.09	0	0	100	E/40089		0.014
Dyffryn Road	4.21	1.73	2.48	0	1.03	40			
Pantyffynnon	2.07	0.34	1.73	0	0	100			
Pentwyn Road	3.89	1.97	1.92	0.01	0.1	94			
Former Betws Colliery	5.70	0.38	5.32	0	0.17	56			
Land North of Penybanc Road	3.66	0.61	3.05	0	0.08	86			
Heol Ddu, Tycroes	5.06	5.06	0.00	0	0	100			
Cilyrychen & Pantyrhodyn Industrial Estates	15.78	6.03	9.75	0.07	0.28	94	E/39760		0.064
Total (existing)	111.29	32.72	78.56	0.25	3.53	88			3.098
Cross Hands East PrC3/E1	8.7						S/28449	8.7	
Cross Hands West Food Park PrC3/E2	6.55								
Cross Hands Business Park PrC3/E3	4.73								
Meadows Road, Cross Hands PrC3/E4	0.3								
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)	33.93							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	2.97	0.00	2.97	0	0	100			
Dyfatty	2.24	0.34	1.90	0	0	100			
Pembrey Industrial Estate	1.54	0.77	0.77	0	0.11	86			
Total (existing)	11.19	1.98	9.21	0	0.2	90			
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	0.43	1.59	0.02	0.26	39	E/34448		0.07
Ffairfach Mart	1.08	0.22	0.86	0	0.22	0			
Total (existing)	5.50	0.95	4.55	0.02	0.71	23			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	7.83	2.41	5.42	0	1.07	55			
Depot SW of Ysgol Pantycelyn	0.99	0.37	0.62	0	0	100			
Total (existing)	8.82	2.78	6.04	0	1.07	58			
Newcastle Emlyn SeC12									
Station Road	1.46	0.11	1.35	0	0	100			
Builders Merchant/Timber Yard	0.72	0.25	0.47	0	0.08	66			
Aberarad	3.41	0.73	2.68	0	0	100	W/33814		0.01
Total (existing)	5.59	1.09	4.50	0	0.08	93			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	0.78	1.62	0.07	0.27	57	W/38617; W/38847		0.55
Wembley Place	0.75	0.33	0.42	0	0.07	80			
St Clears Business Park	0.81	0.16	0.65	0.01	0.06	59			
Depot Opposite Gardde Fields	0.58	0.21	0.37	0	0.21	0			
Land adj A40	2.46	1.32	1.14	0	0.48	63	W/20735; W/32747; W/34779		1.16
Total (existing)	8.03	3.25	4.79	0.08	1.21	60			2.54
St Clears Business Park SeC18/E1	0.44								
Total (proposed)	0.44								

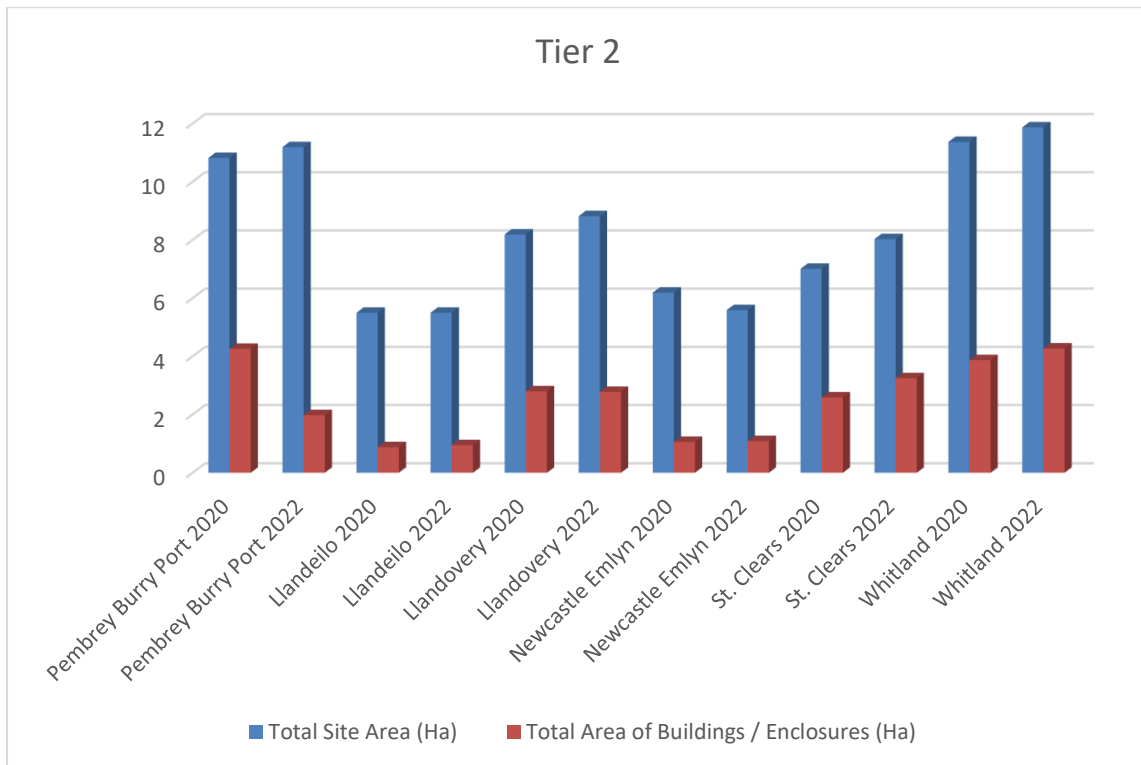
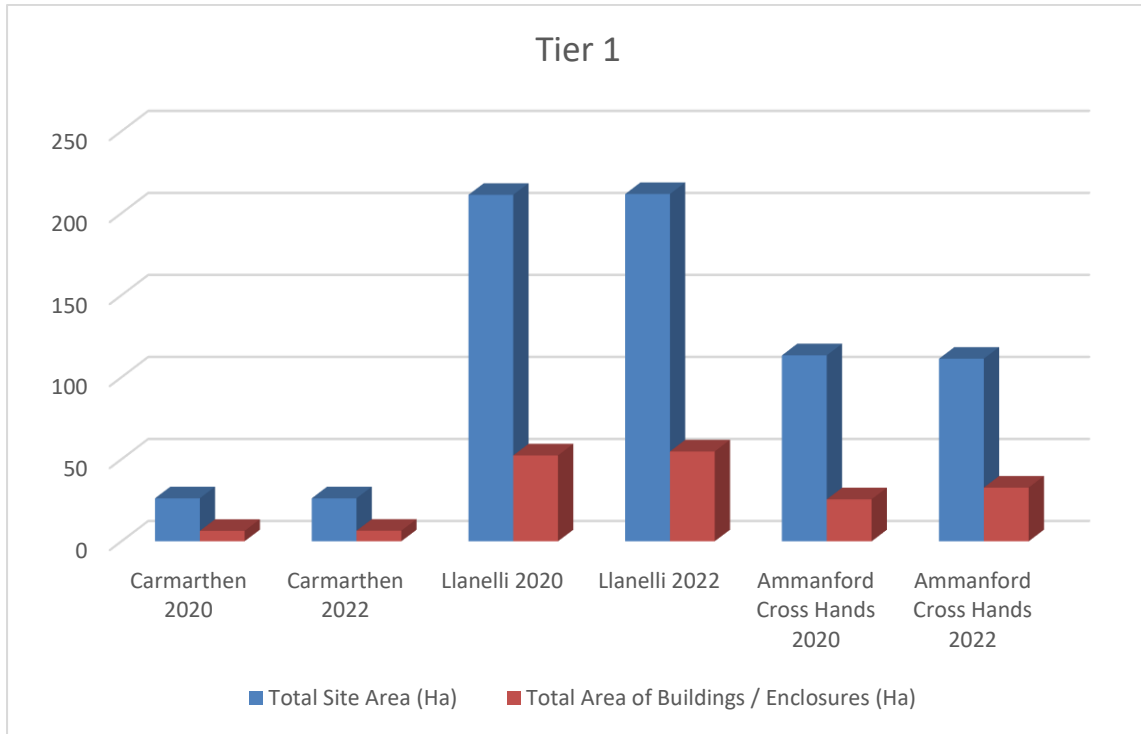
Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission 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			
Station Road East	0.38	0.06	0.32	0	0.06	0	W/32606		0.35
Station Road East (Former Coal Yard)	0.45	0.45	0.00	0	0	100			
Trevaughan	2.57	1.67	0.90	0	0.19	88			
Whitland Industrial Estate	3.37	0.53	2.84	0	0.33	37	W/30784		0.57
Whitland Creamery	3.36	1.15	2.21	0	0.19	83			
Total (existing)	11.87	4.27	7.60	0	1.06	75			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	0.88	1.55	0	0.16	82			
Industrial Estate Pembrey Road (East)	2.43	0.33	2.1	0	0.22	34	S/33928		0.35
Total (existing)	4.86	1.21	3.65	0	0.38	69			0.35
Ponthenri SeC1									
Ponthenri Industrial Estate (existing)	3.05	0.62	2.43	0	0.02	98	S/39731		0.14
Pontyberem SeC11									
Coalbrook Road (existing)	0.91	0.26	0.65	0	0.15	40			
Hendy SeC6									
Industrial Estate (existing)	3.97	1.43	2.54	0	0.16	89			
Glanamman / Garnant SeC10									
Land at Station Road	1.79	0.24	1.55	0	0.19	23			
Old Coal Yard, Heol Dwr	2.79	0.16	2.63	0	0	100	E/30381		0.08
Raven Industrial Estate	0.97	0.16	0.81	0	0.04	73			
Glanamman Workshops	1.23	0.17	1.06	0.01	0	92	PL/00308		0.57
Total (existing)	6.78	0.73	6.05	0.01	0.23	67			0.65
Brynamman SeC9									
Brynamman Industrial Estate, Cwmgarw Road	0.29	0.04	0.25	0	0.01	77			
Old Remploy Factory, Cwmgarw Road	0.82	0.18	0.64	0	0.18	0	E/36279		0.78
Total (existing)	1.11	0.22	0.89	0	0.19	12			0.78

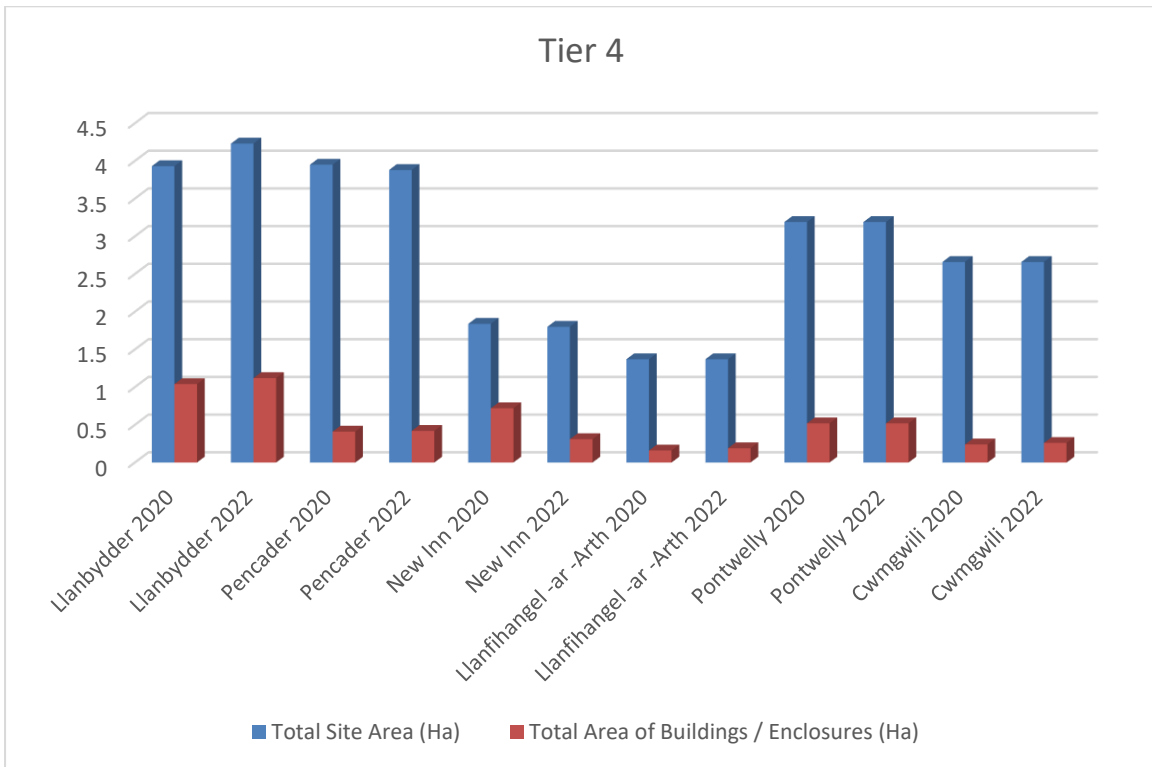
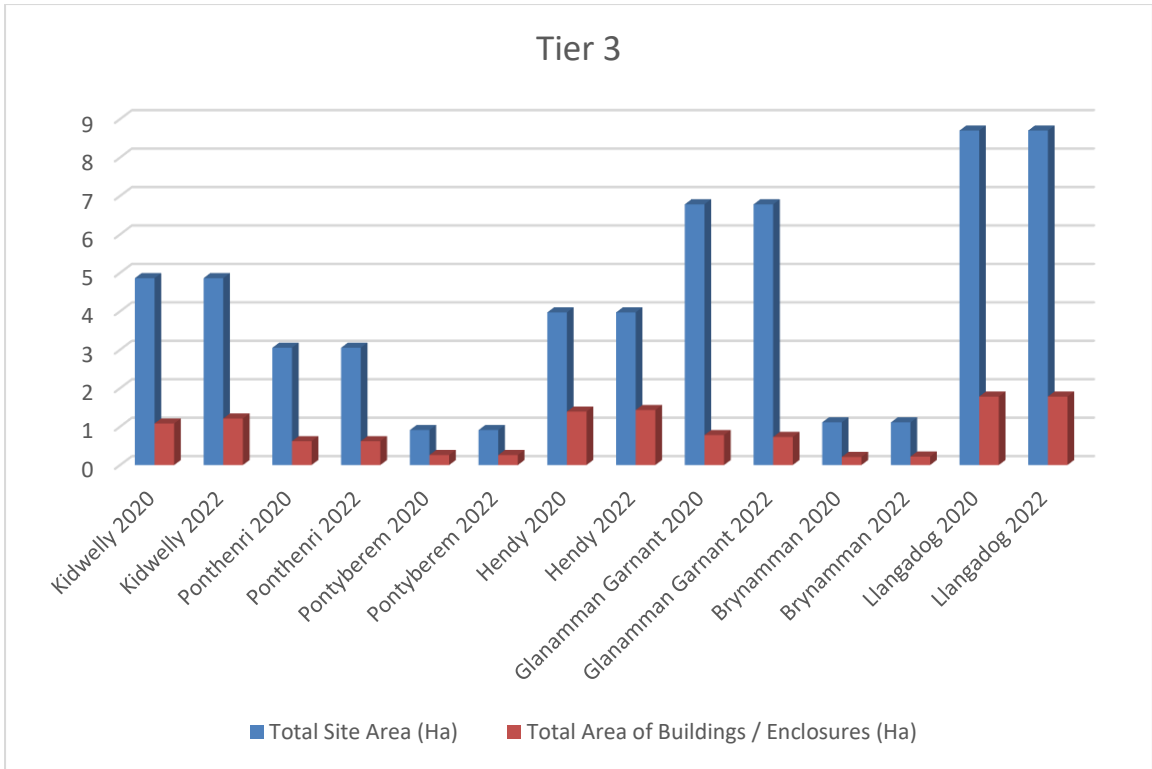
Site name	Total Site Area (Ha) 2020	Total Area of Buildings / Enclosures (Ha) 2020	Infrastructure, landscaping and difficult to develop land (Ha)	Buildings/Enclosures vacant or not in use (Ha)	Buildings/Enclosures not in B Class employment use (Ha)	Proportion of Use Class (B1, B2, B8) (%)	Planning permission 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	E/39801		0.19
Station Road (North)	1.21	0.39	0.82	0	0	100			
Station Road	3.33	0.26	3.07	0	0.24	8	E/32491		1.6
Total (existing)	8.70	1.78	6.92	0	0.24	87			1.79
Llanybydder SeC13									
Dunbia (Abattoir)	3.12	0.85	2.27	0	0	97	W/40241		0.09
Timber Yard	0.30	0.08	0.22	0	0.08	0			
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)	4.23	1.12	3.11	0	0.15	90			0.09
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	74			
B4459	0.96	0.14	0.82	0.09	0.03	13			
Clos cader	0.85	0.21	0.64	0	0	100			
Total (existing)	3.88	0.42	3.46	0.11	0.03	67			
New Inn SuV43									
Scrap Yard & Engineering Works	0.40	0.05	0.35	0	0	100			
Adj Gwastod Abbot	1.40	0.26	1.14	0	0.26	0			
Total (existing)	1.80	0.31	1.49	0	0.26	16			
Llanfihangel - ar- arth SuV39									
Depots and factory	1.37	0.19	1.18	0	0.13	31			
Pontwelly SuV41									
Station Road	1.38	0.24	1.14	0	0.18	27			
Lewis Street	1.14	0.14	1	0.08	0.06	0			
Estate adj B4624	0.67	0.14	0.53	0	0.02	88			
Total (existing)	3.19	0.52	2.67	0	0.26	35			
Cwmgwili SuV28									
Heathfield Industrial Estate (existing)	2.66	0.26	2.4	0	0.03	90			
Grand Total (existing sites)	446.69	117.29	329.40	1.87	20.44	81			13.13
Grand Total (proposed sites in Deposit Revised LDP)	76.38							18.08	

Appendix 2

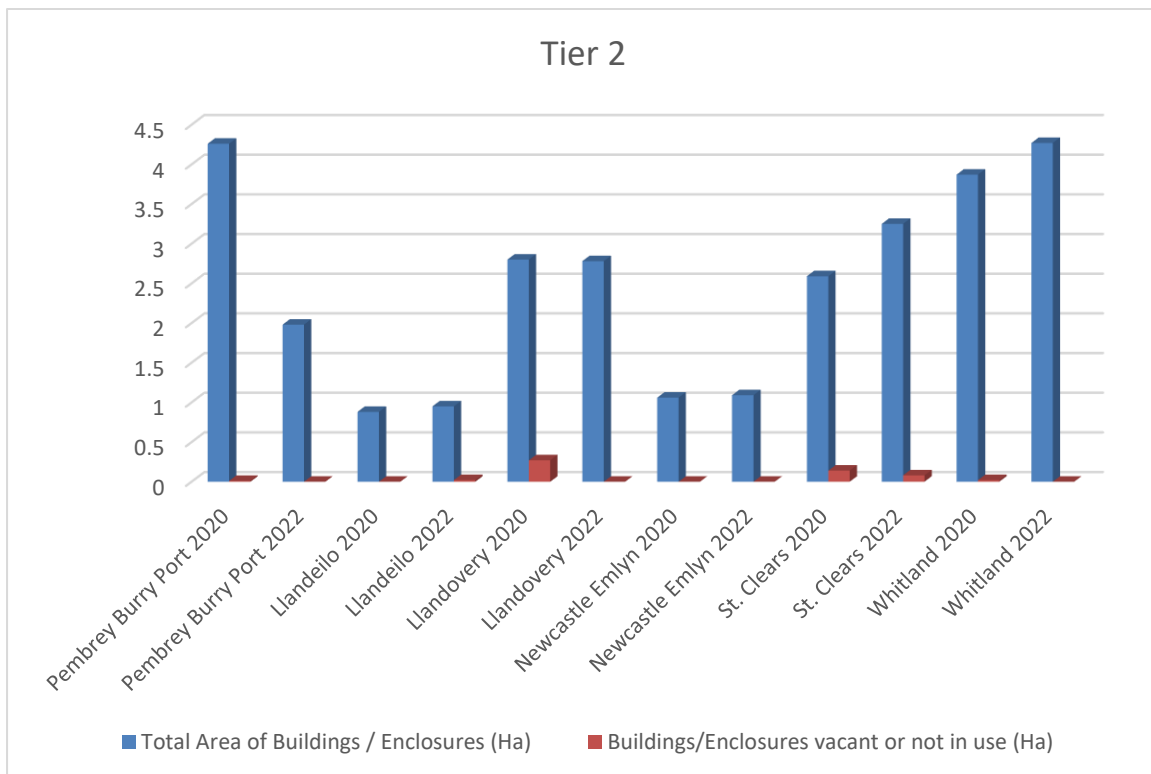
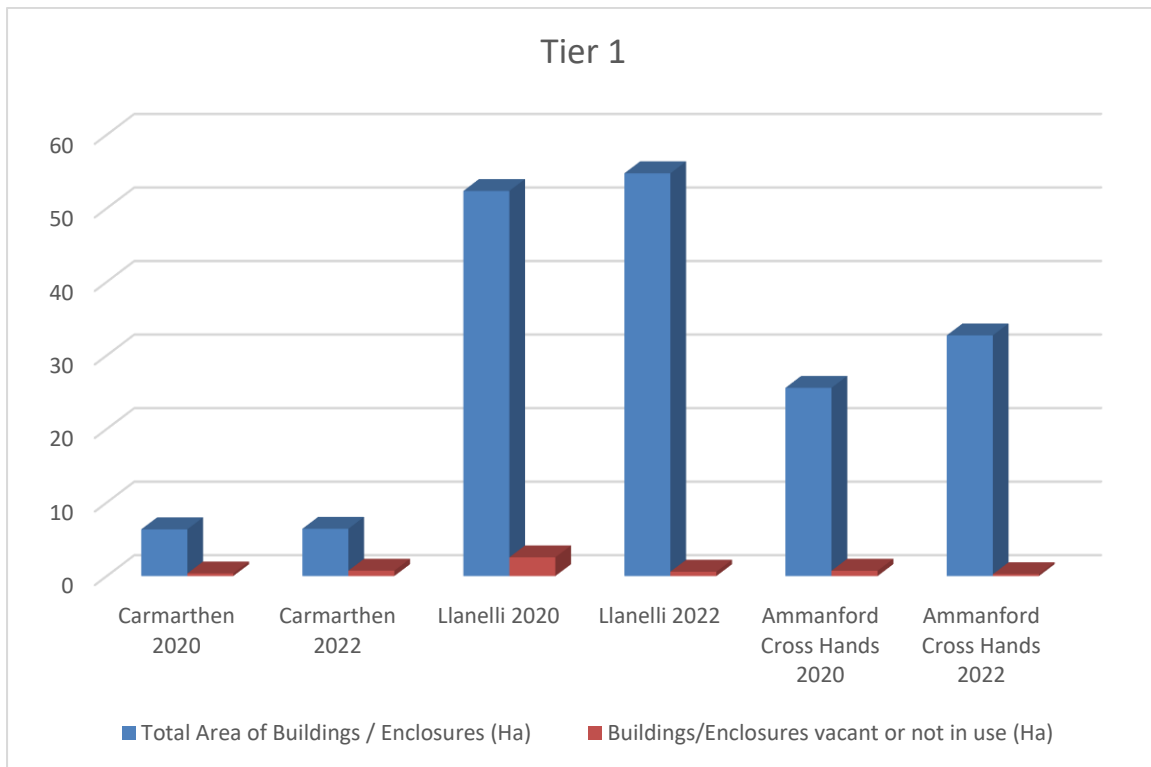
Comparison between
existing employment sites
in 2020 and 2022

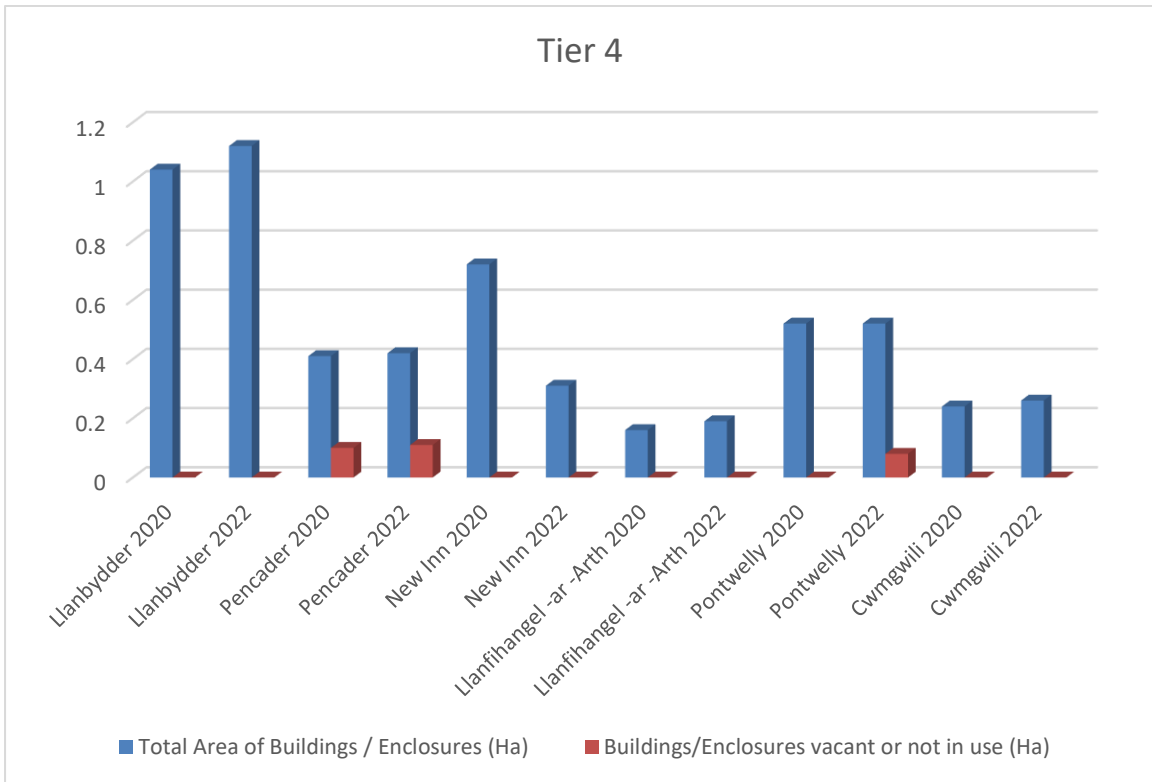
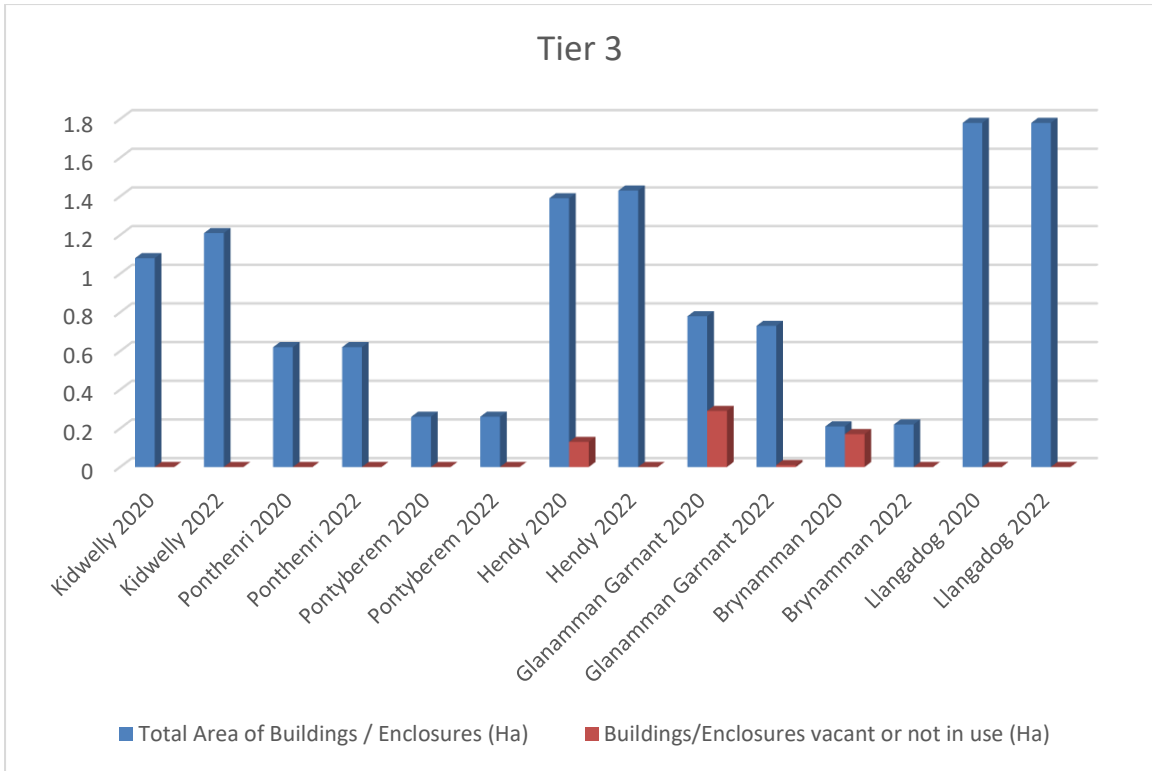
4. Total site area and total area of buildings/enclosures





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





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

