

sirgar.llyw.cymru
carmarthenshire.gov.wales

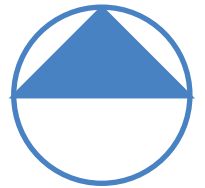
Town Centre Retail Audit 2024

Carmarthenshire



Cyngor Sir Gâr
Carmarthenshire
County Council





Introduction

This audit presents information on the location of retail units and non retail units within the town centres and looks at the changes of use which occur with a view of identifying any patterns and trends. These audits inform the monitoring and implementation of the LDP and guide future reviews and policy initiatives. Results are also utilised to inform regeneration and town centre renewal initiatives as well as providing evidential support for future strategies and masterplans as and where appropriate.



Purpose of the Audit - Methodology

Purpose of the Audit

This retail audit seeks to provide an overview of the commercial activity within Carmarthenshire's Retail Centres. The audit will consider activity primarily within the Principal Centres of Carmarthen, Llanelli and Ammanford/Cross Hands, but will also examine activity within the Town Centres (Service Centres) as set out within policy RT1 – Retail Hierarchy of the adopted Carmarthenshire Local Development Plan (LDP)

Methodology

The results are compiled from annual on street surveys undertaken during the month of March as part of the requirements for the LDP Annual Monitoring Report (AMR). The survey only considers activity at a ground floor level with activity measured through frontages as opposed to floorspace. The areas contained within this audit are consistent with those as defined within the LDP and relates to the Principal Centres (Growth Areas) and Town Centres (Service Centres).

It is recognised that the audit constitutes a 'snapshot in time' with the nature of occupancy and vacancy frequently changing. Care should therefore be taken in utilising the outcomes of the audit with its outcomes validated accordingly.



Principal Centres

LDP Commentary

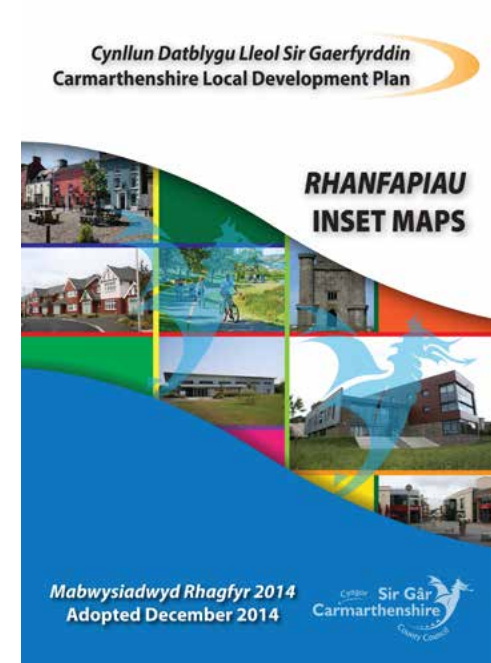
Principal Centres within the LDP's retail hierarchy represent the highest tier and reflects the significance of the respective town centre and the settlement's position within a designated Growth Area (Policy SP3) with the LDP. The following settlements are identified within the Retail Hierarchy (Policy RT1) as Principal Centres:

- Carmarthen
- Llanelli
- Ammanford

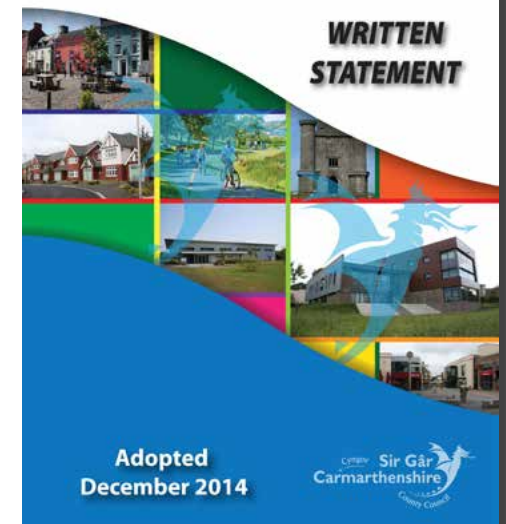
As with all Principal Centres the planning policy provisions include a Primary Retail Frontage (Policy RT2) which seeks to safeguard existing retail (A1) frontage.

Those areas of the town centre identified as Secondary Retail Frontage (Policy RT3) reflect the objective of the LDP in striking a balance between protecting the overall retail character and providing for a diversity of uses. In so doing it places limitations of changes of use with the aim of maintaining the retail character.

The 'town centre' designation reflects the broader commercial area where the diversity of activities may benefit the overall vitality and viability.



Carmarthenshire Local
Development Plan

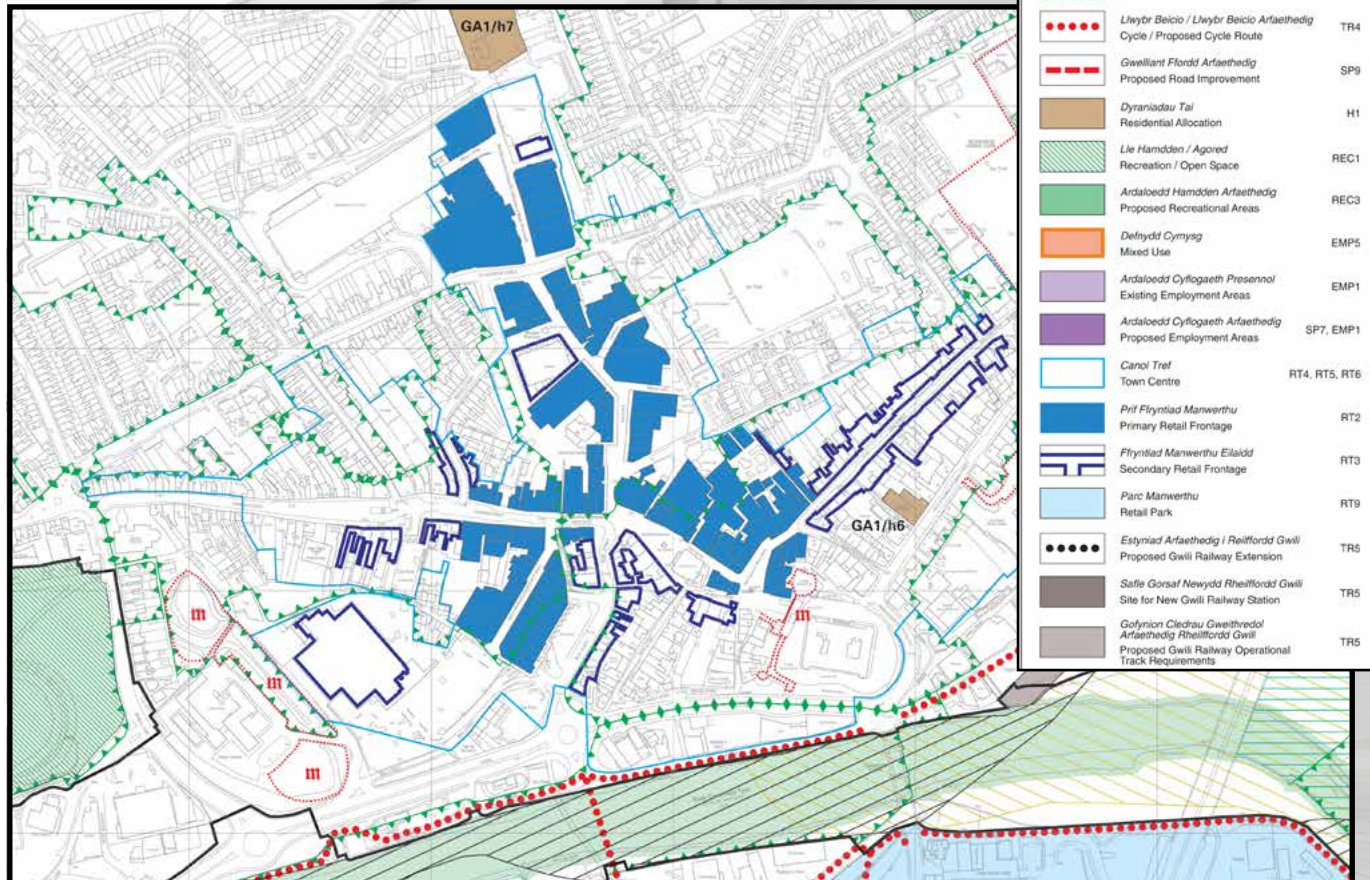


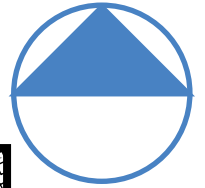
Carmarthen

Background

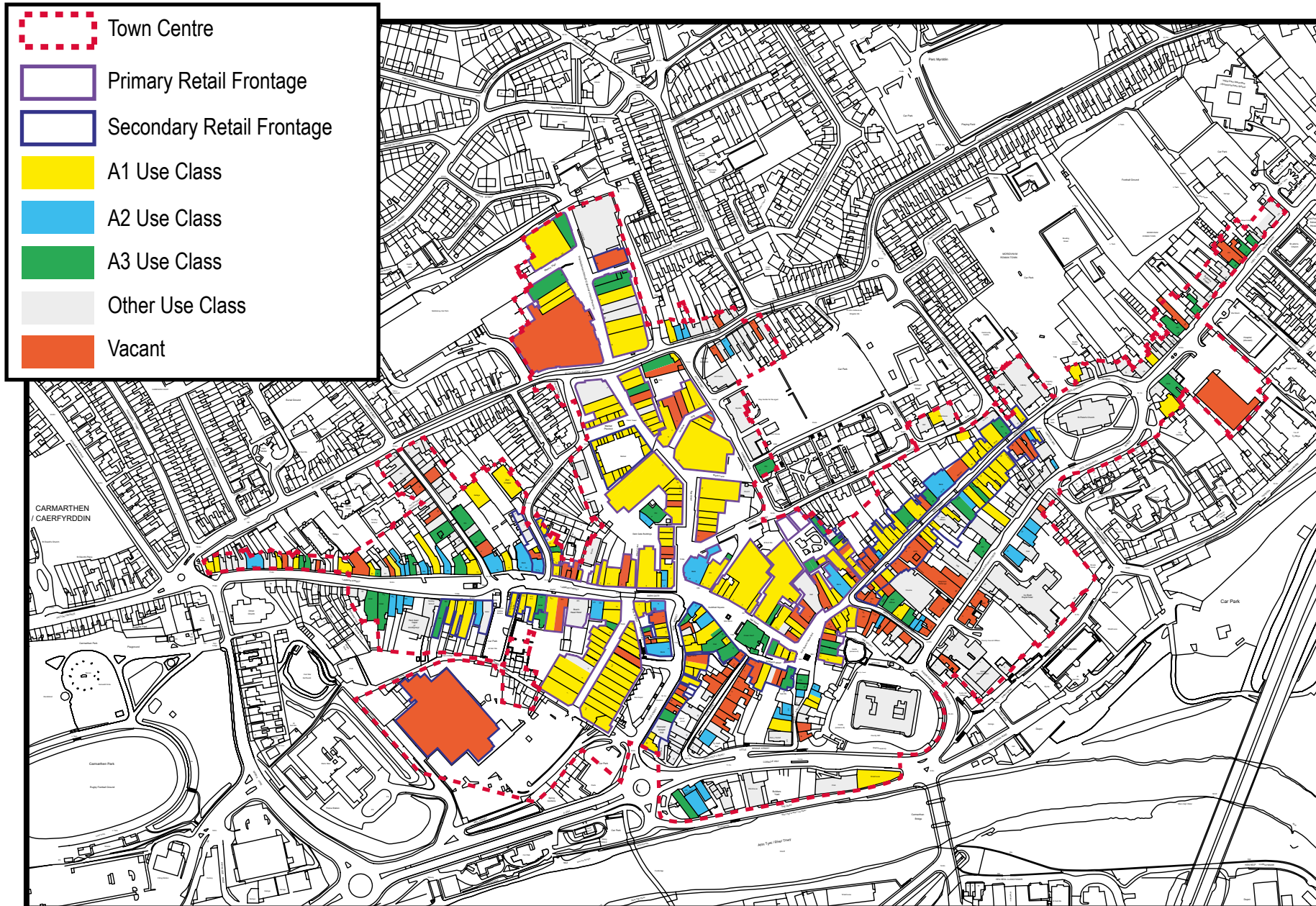
Carmarthen is a longstanding and well performing town centre with a strong retail offer. A large market town, Carmarthen serves a wide range of communities both locally and within the broader region offering a mix of national high street names with smaller local and niche retail stores. The retail and commercial offer of the town centre was enhanced by the development of the St Catherine's Walk development, which was occupied by a number of high street chains and was anchored by a Debenhams store and a multi-screen cinema. Now, with Debenhams closed and with some of the chains leaving the high street this part of the town centre now houses some independent retailers, whilst also retaining some of the original businesses such as Next, Pizza Express and the cinema which remains.

Carmarthen Town Centre (GA1): Adopted LDP - Extract



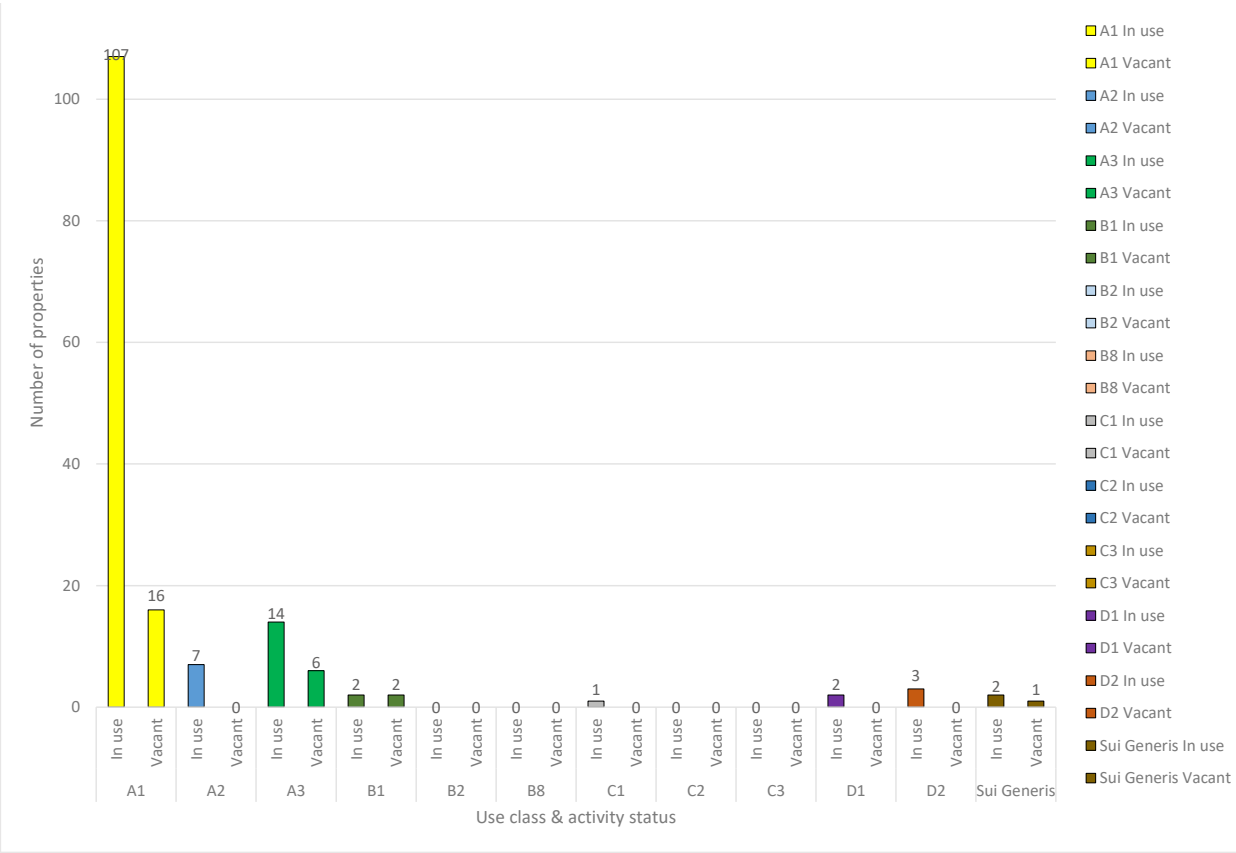


Carmarthen - Activity by Use Class (including Vacant Units)



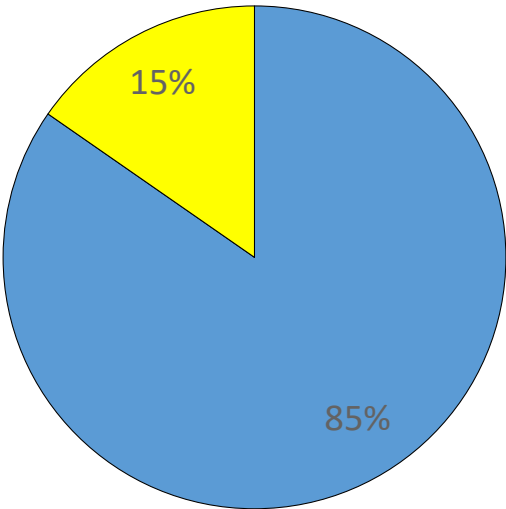
Carmarthen - Activity by Use Class (including Vacant Units)

Carmarthen Primary Retail Frontage



Carmarthen Primary Retail Frontage

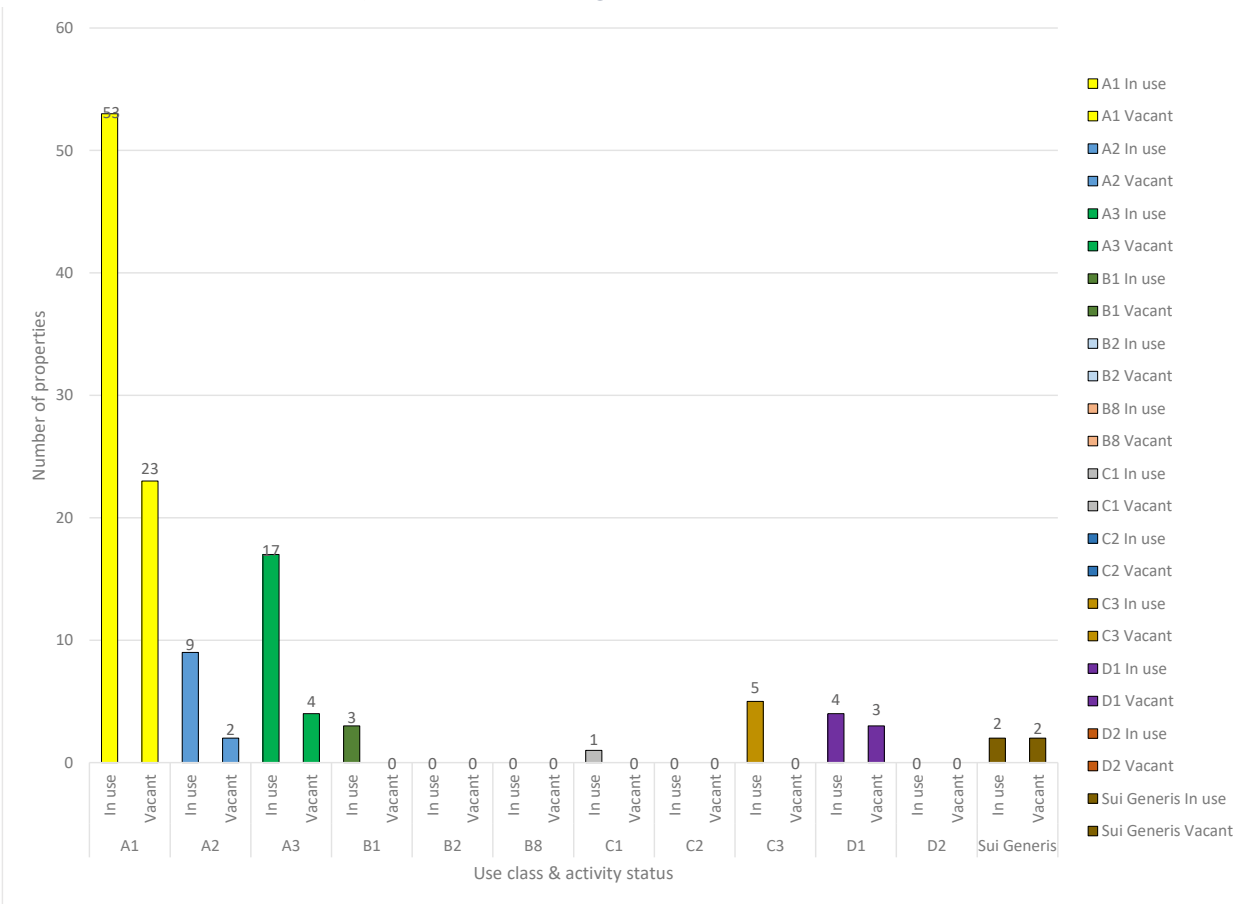
Vacancy Rates



In use total Vacant total

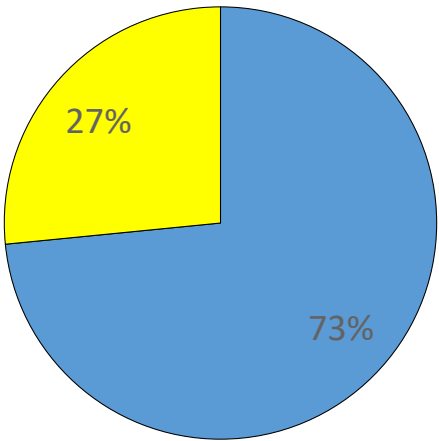
Carmarthen - Activity by Use Class (including Vacant Units)

Carmarthen Secondary Retail Frontage



Carmarthen Secondary Retail Frontage

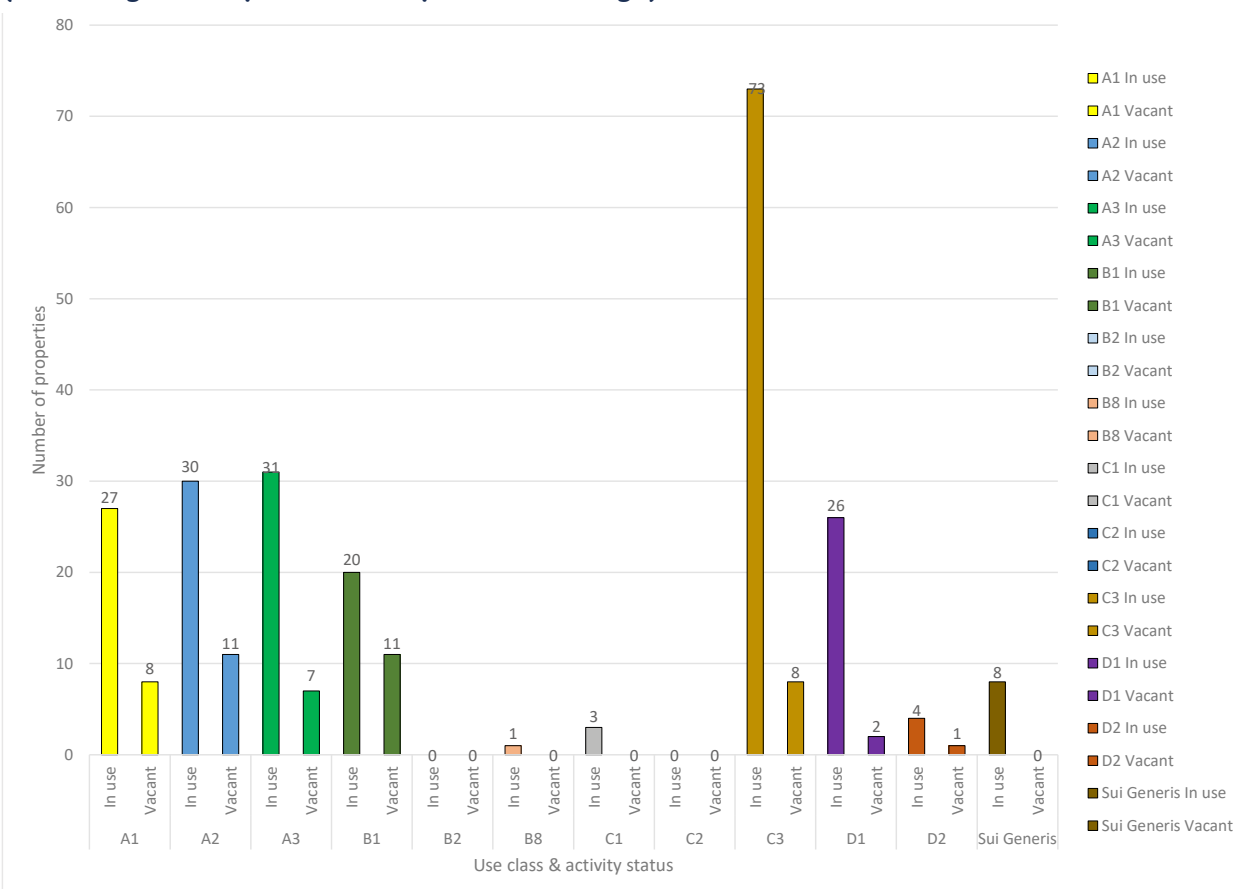
Vacancy Rates



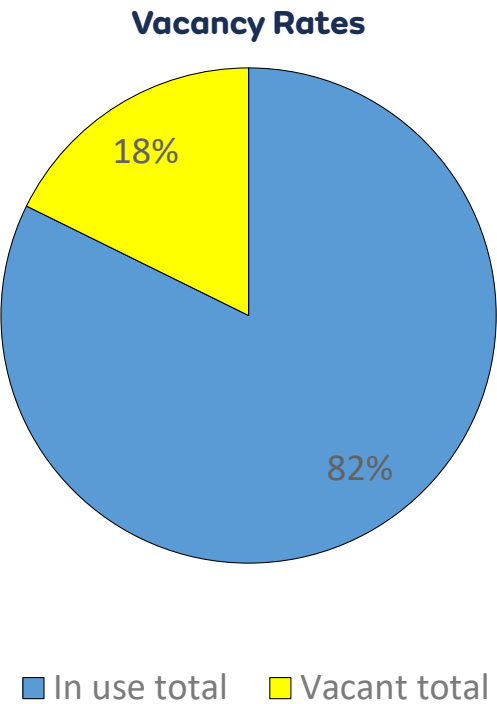
In use total Vacant total

Carmarthen - Activity by Use Class (including Vacant Units)

Carmarthen Town Centre
(Excluding Primary & Secondary Retail Frontage)



Carmarthen Town Centre
(Excluding Primary & Secondary Retail Frontage)

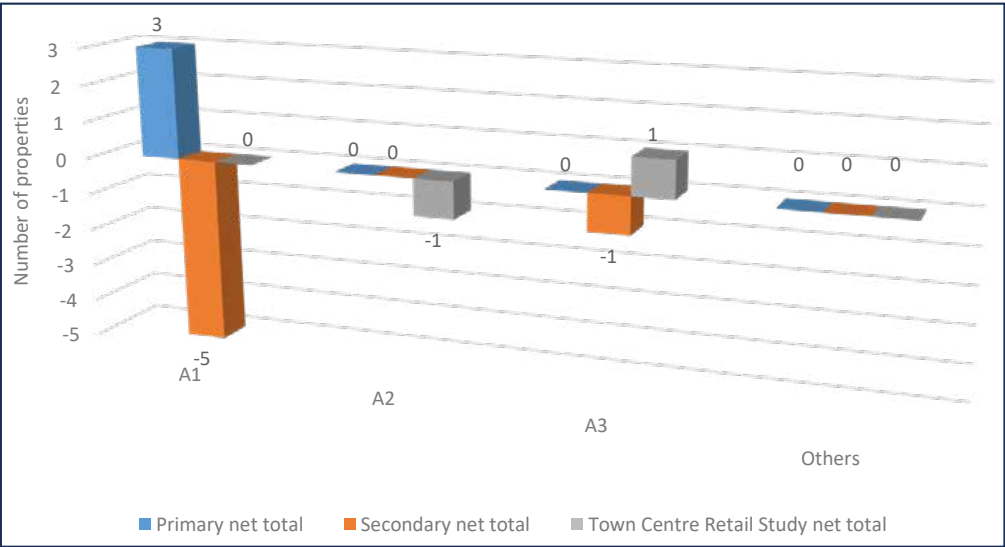


Carmarthen - Activity by Use Class (including Vacant Units)

Carmarthen Retail Activity Comparison between September 2023 and March 2024

	Primary net total	Secondary net total	Town Centre Retail Study net total	Combined net total
A1	3	-5	0	-2
A2	0	0	-1	-1
A3	0	-1	1	0
Others	0	0	0	0
Total	3	-6	0	-3

Carmarthen net gain/loss of in Use Retail Space between September 2023 and March 2024



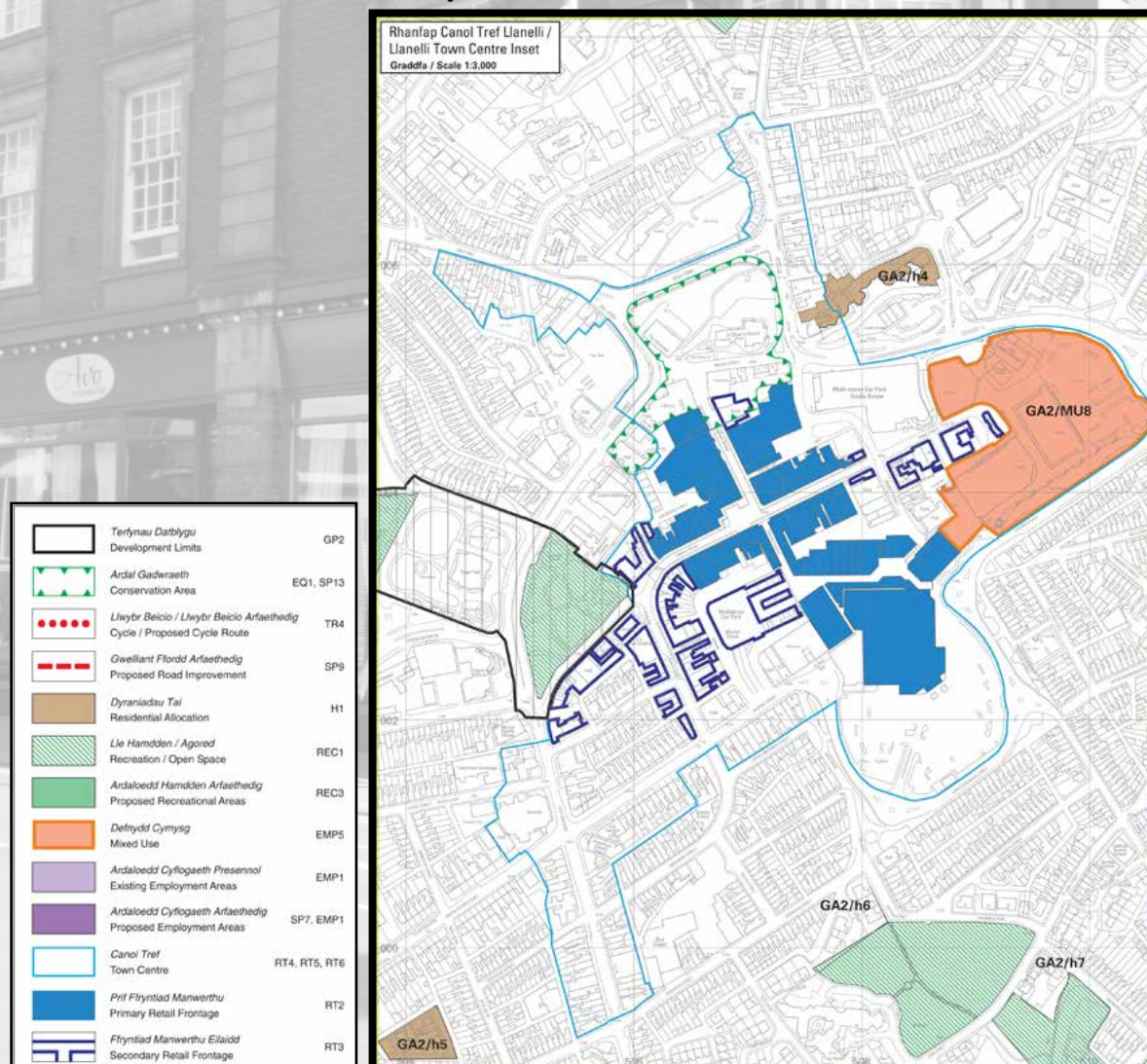
Llanelli

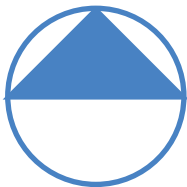
Background

Llanelli is an established retail centre located in the south east of the County. A town with a strong industrial heritage Llanelli and its town centre has an established retail role which has in recent years been supplemented by out of town offers. Despite the challenge and competition from the out of town developments the town retains a retail core containing a mix of national and local stores. The development at 'Eastgate', which includes an Odeon cinema has seen a significant regeneration of part of the town centre, whilst also broadening the town centre's offer to include commercial leisure. There are also ongoing investments in property refurbishment elsewhere within the town centre as part of the Vibrant and Viable Places grant. This has demonstrated notable success in regenerating areas of the town centre and in bringing properties back into effective use.

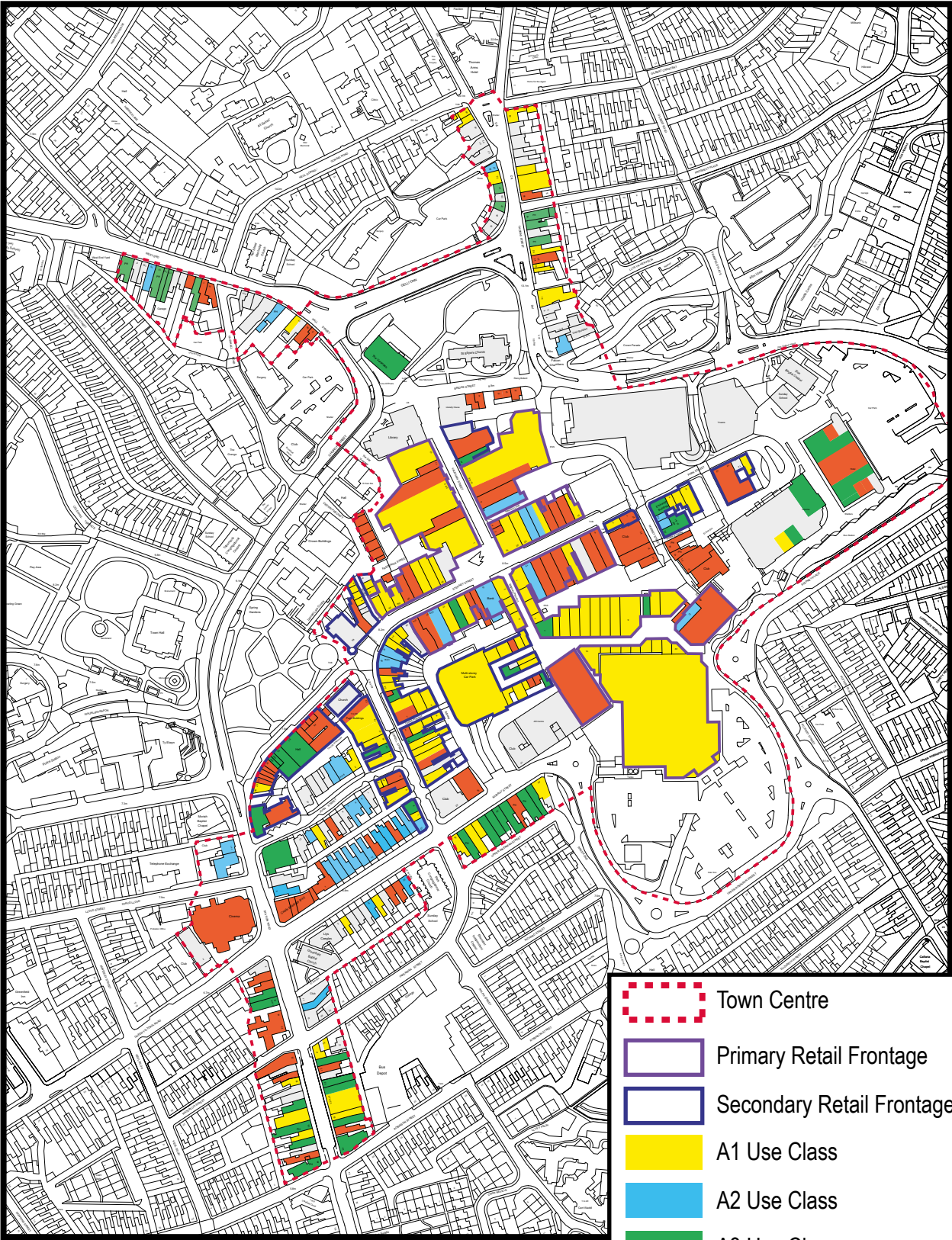



Llanelli Town Centre (GA2): Adopted LDP - Extract








Llanelli - Activity by Use Class (including Vacant Units)





 Town Centre


 Primary Retail Frontage


 Secondary Retail Frontage

 A1 Use Class

 A2 Use Class

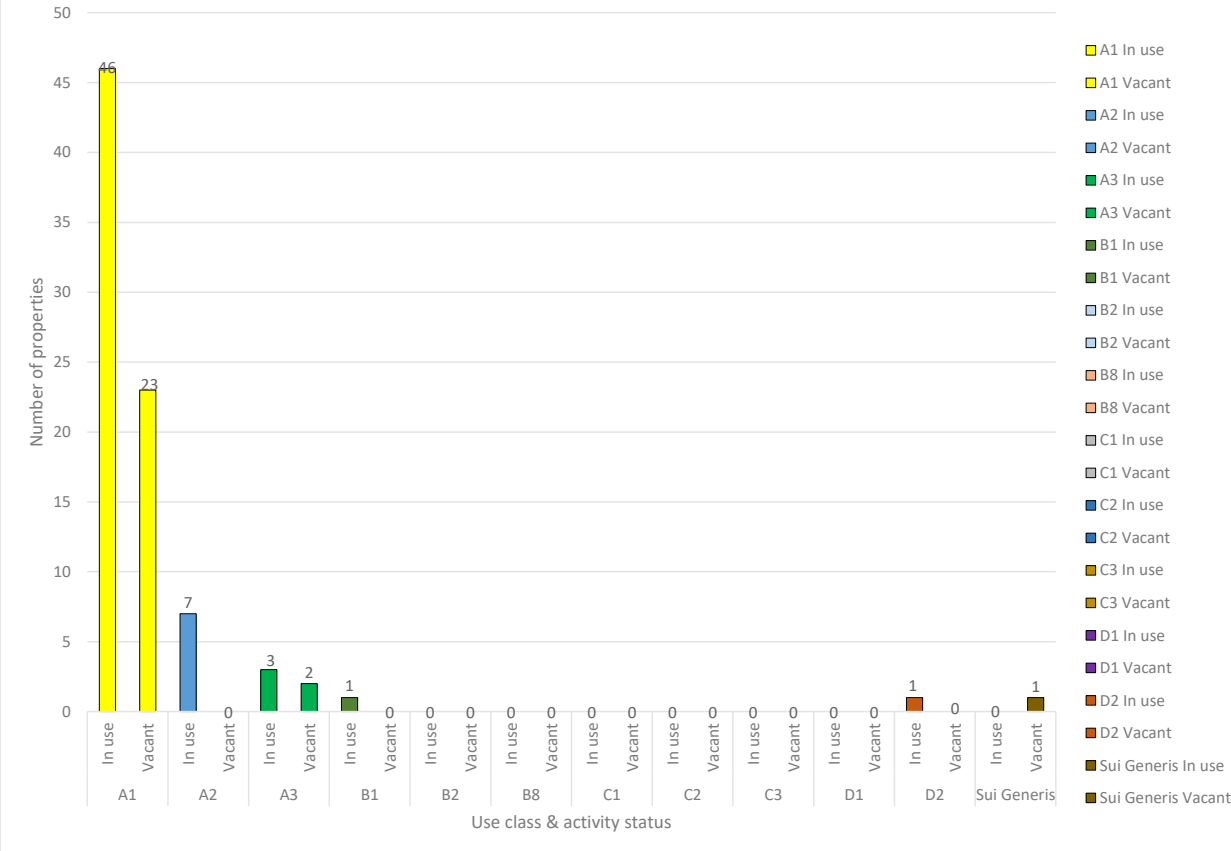
 A3 Use Class

 Other Use Class

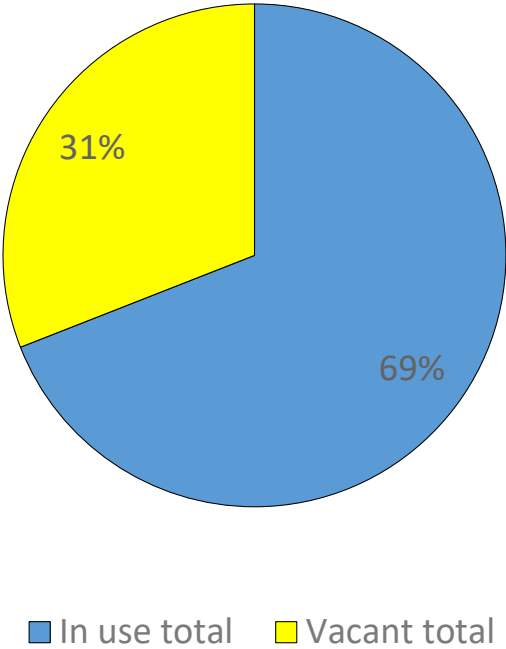
 Vacant

Llanelli - Activity by Use Class (including Vacant Units)

Llanelli Primary Retail Frontage

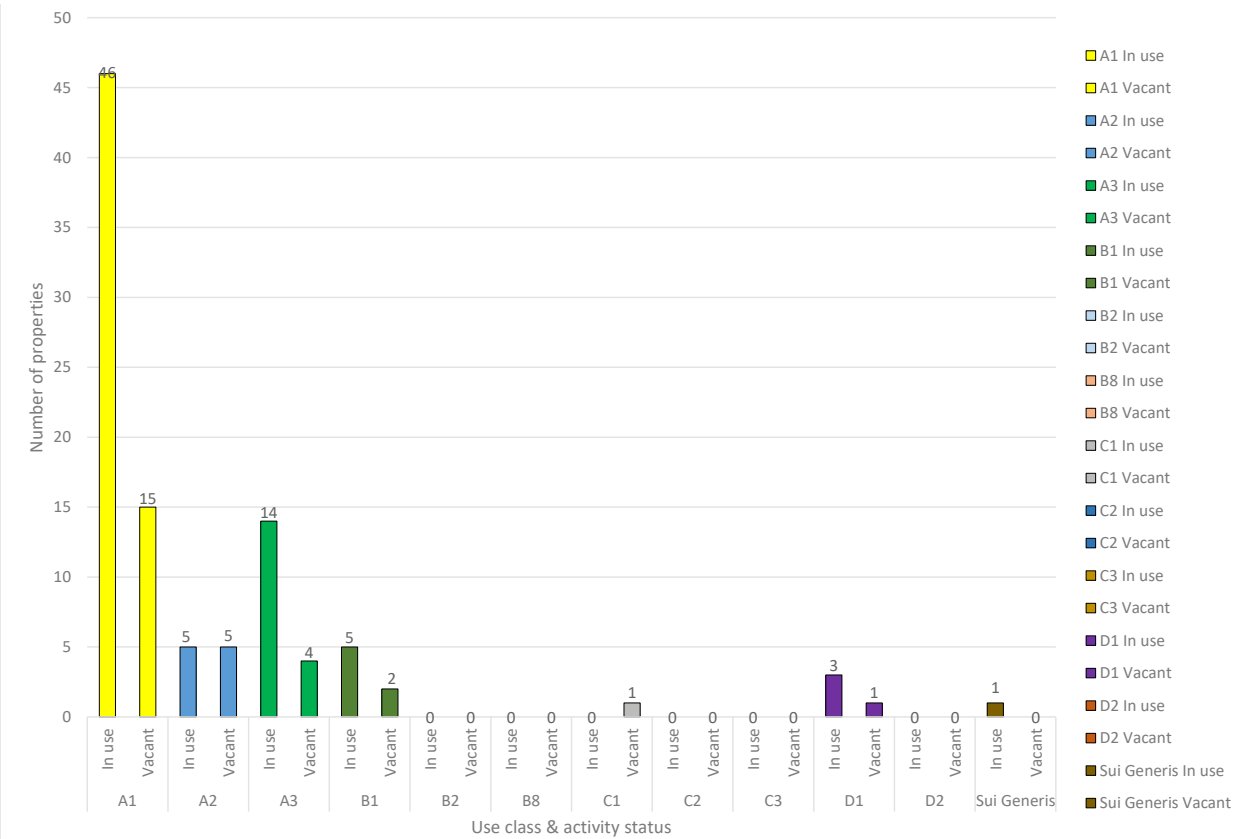


Llanelli Primary Retail Frontage
Vacancy Rates

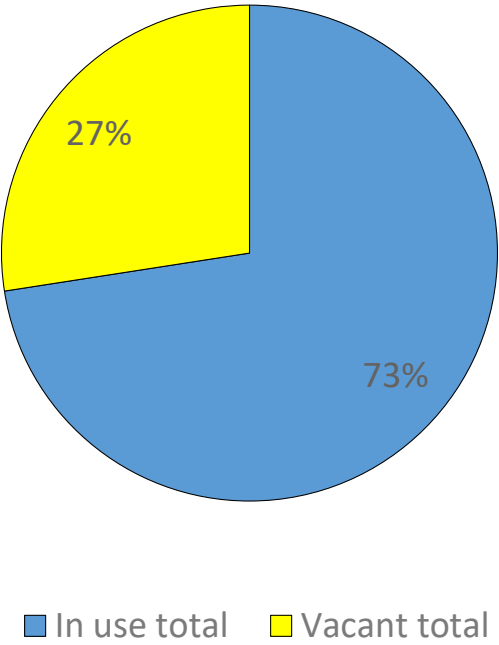


Llanelli - Activity by Use Class (including Vacant Units)

Llanelli Secondary Retail Frontage

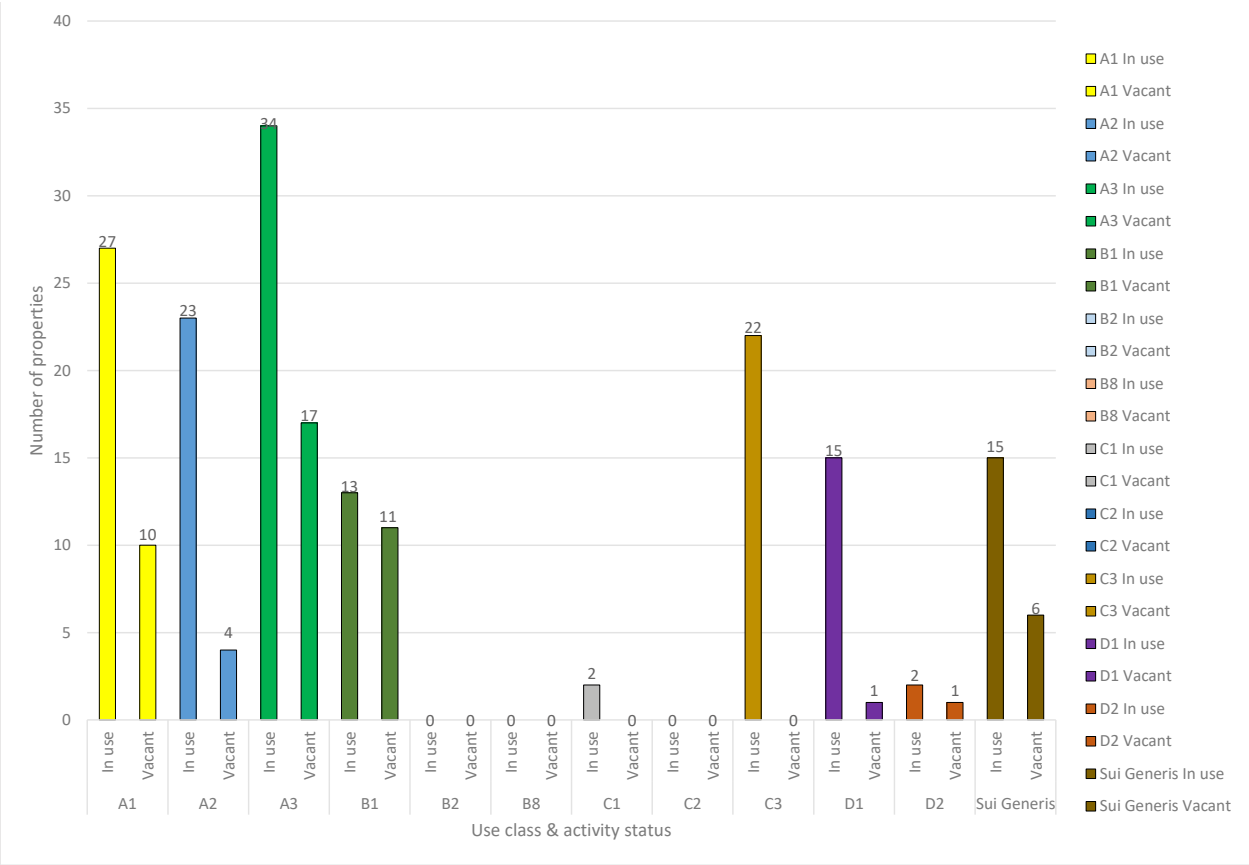


Llanelli Secondary Retail Frontage
Vacancy Rates



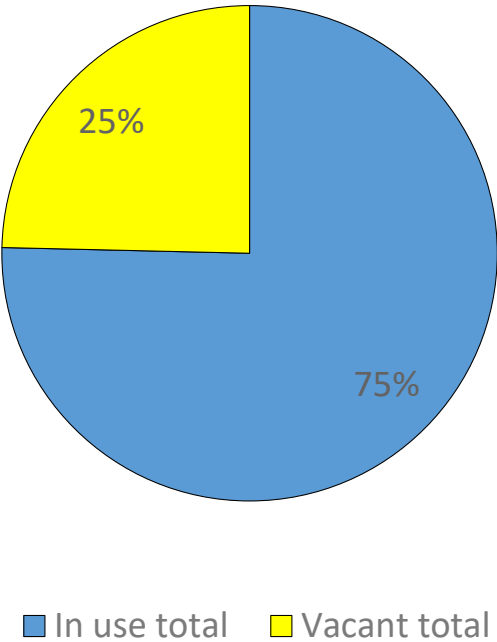
Llanelli - Activity by Use Class (including Vacant Units)

Llanelli Town Centre
(Excluding Primary & Secondary Retail Frontage)



Llanelli Town Centre
(Excluding Primary & Secondary Retail Frontage)

Vacancy Rates

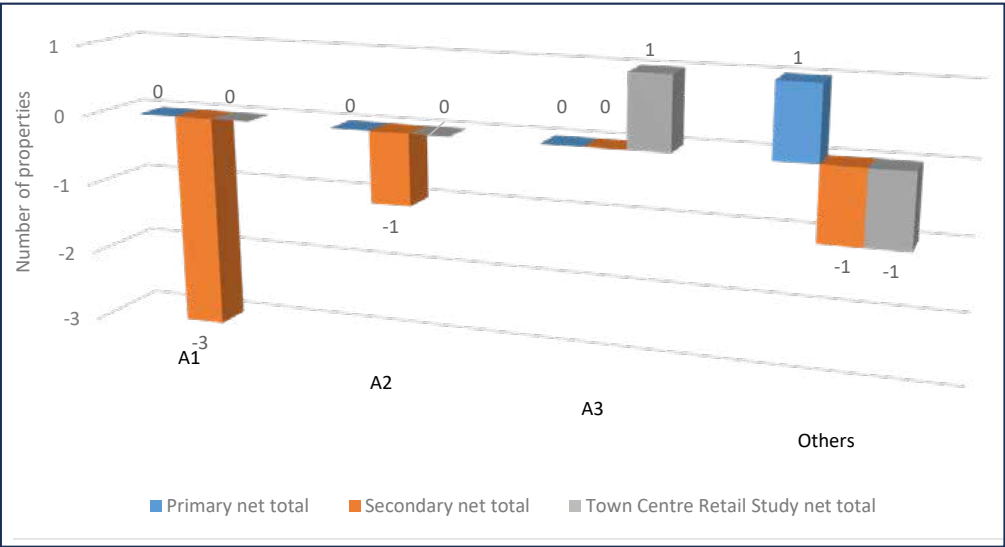


Llanelli - Activity by Use Class (including Vacant Units)

Llanelli Retail Activity Comparison between September 2023 and March 2024

	Primary net total	Secondary net total	Town Centre Retail Study net total	Combined net total
A1	0	-3	0	-3
A2	0	-1	0	-1
A3	0	0	1	1
Others	1	-1	-1	-1
Total	1	-5	0	-4

Llanelli net gain/loss of in Use Retail Space between September 2023 and March 2024

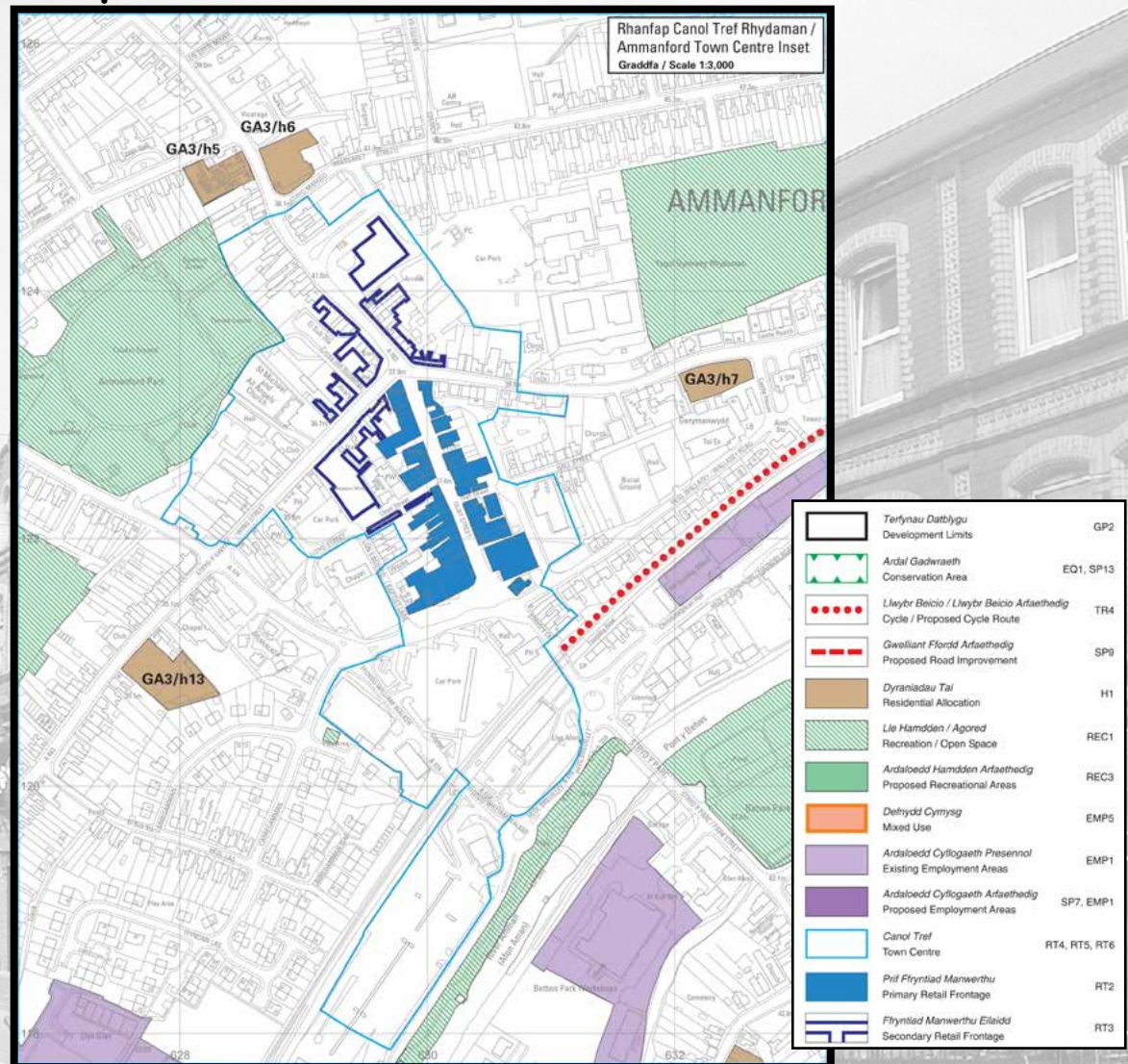


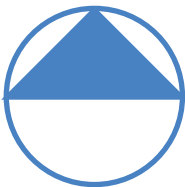
Ammanford

Background

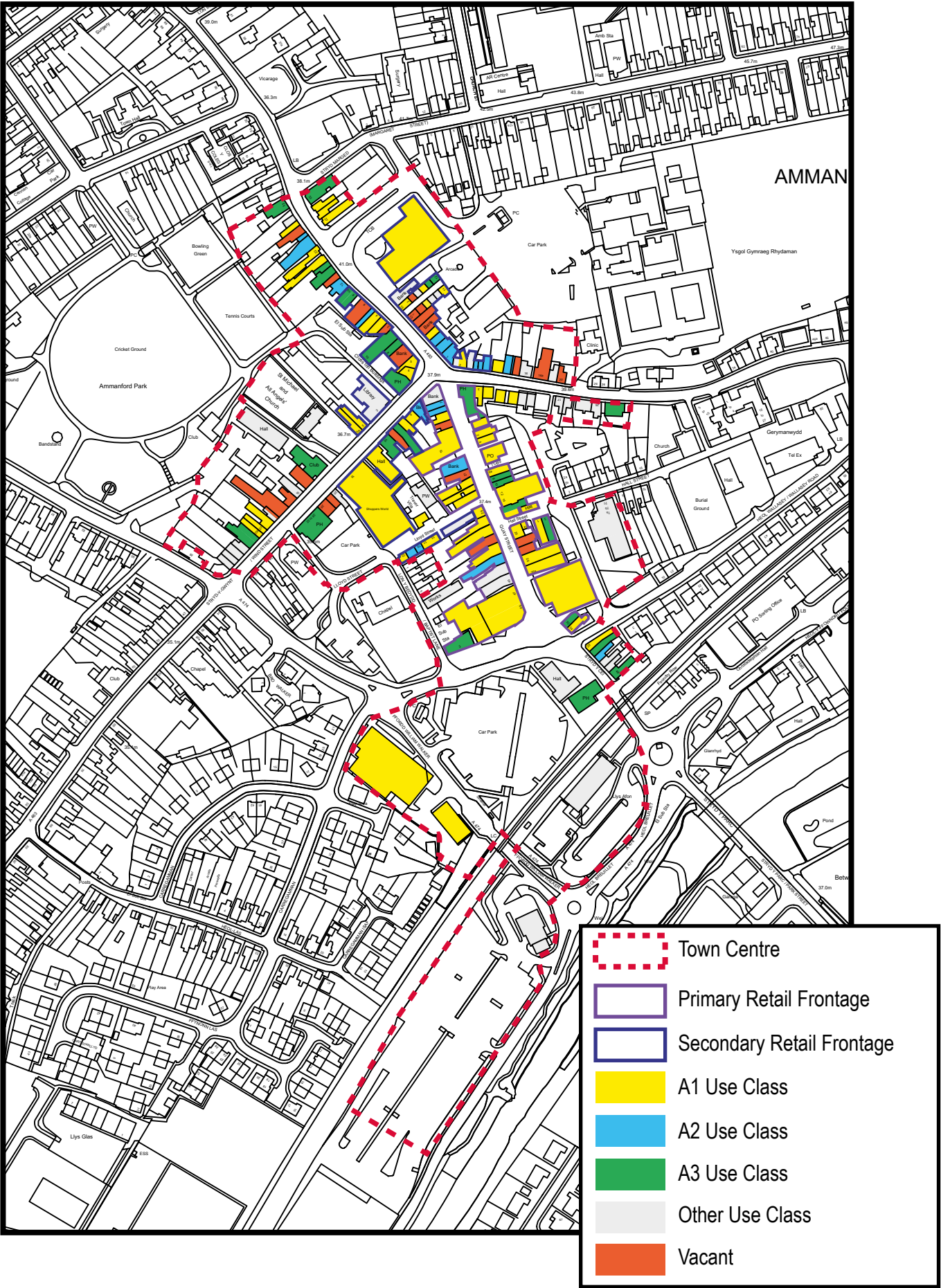
Ammanford whilst is notably smaller than the retail centres of either Carmarthen or Llanelli fulfils an important retail function within its locality. As the key retail centre within the Ammanford/Cross Hands Growth Area it provides an important high street offer which includes representation from a number of national chains serving both the growth area and wider communities.

Ammanford Town Centre (GA3): Adopted LDP - Extract



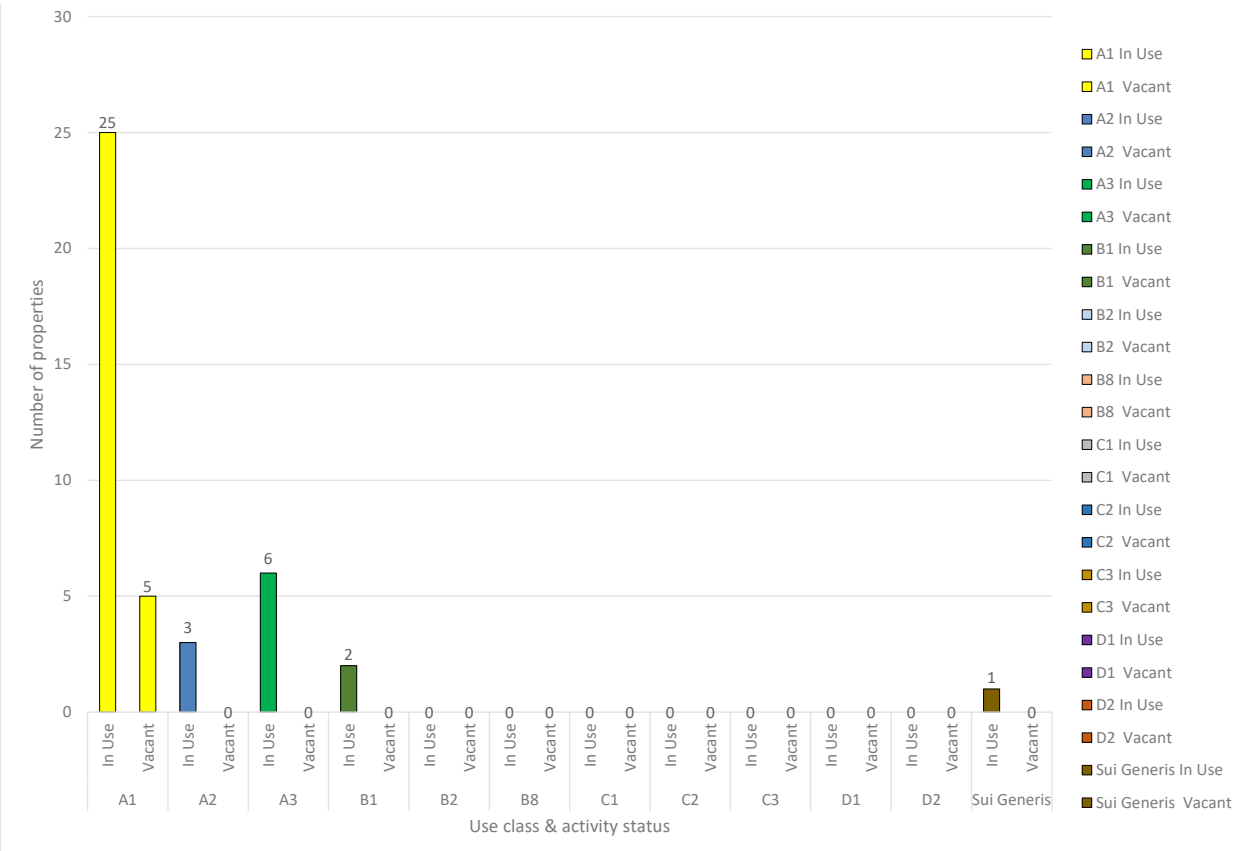


Ammanford - Activity by Use Class (including Vacant Units)

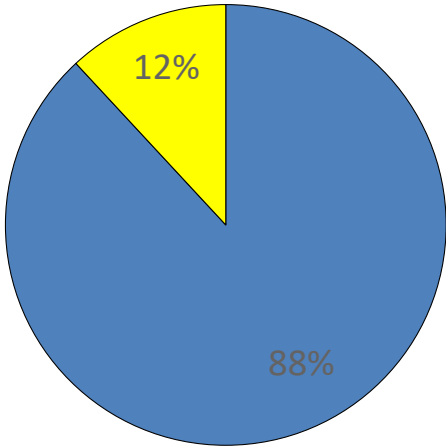


Ammanford - Activity by Use Class (including Vacant Units)

Ammanford Primary Retail Frontage



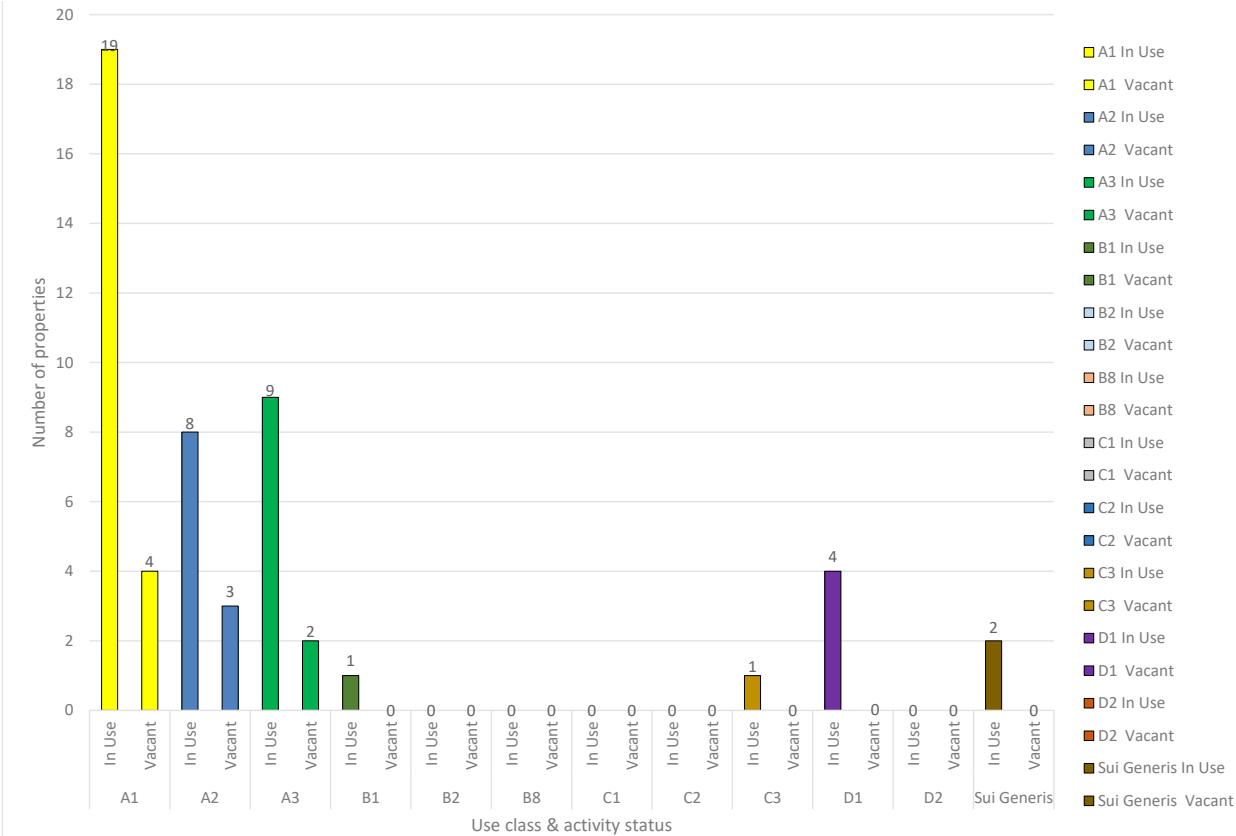
Ammanford Primary Retail Frontage
Vacancy Rates



■ In use total ■ Vacant total

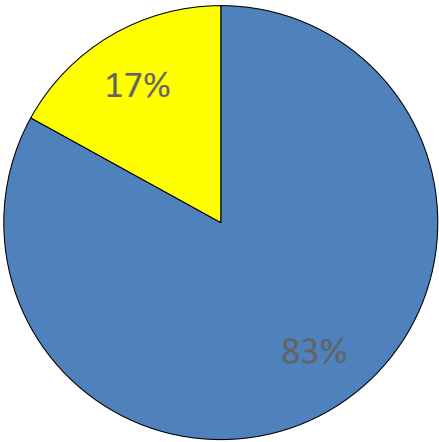
Ammanford - Activity by Use Class (including Vacant Units)

Ammanford Secondary Retail Frontage



Ammanford Secondary Retail Frontage

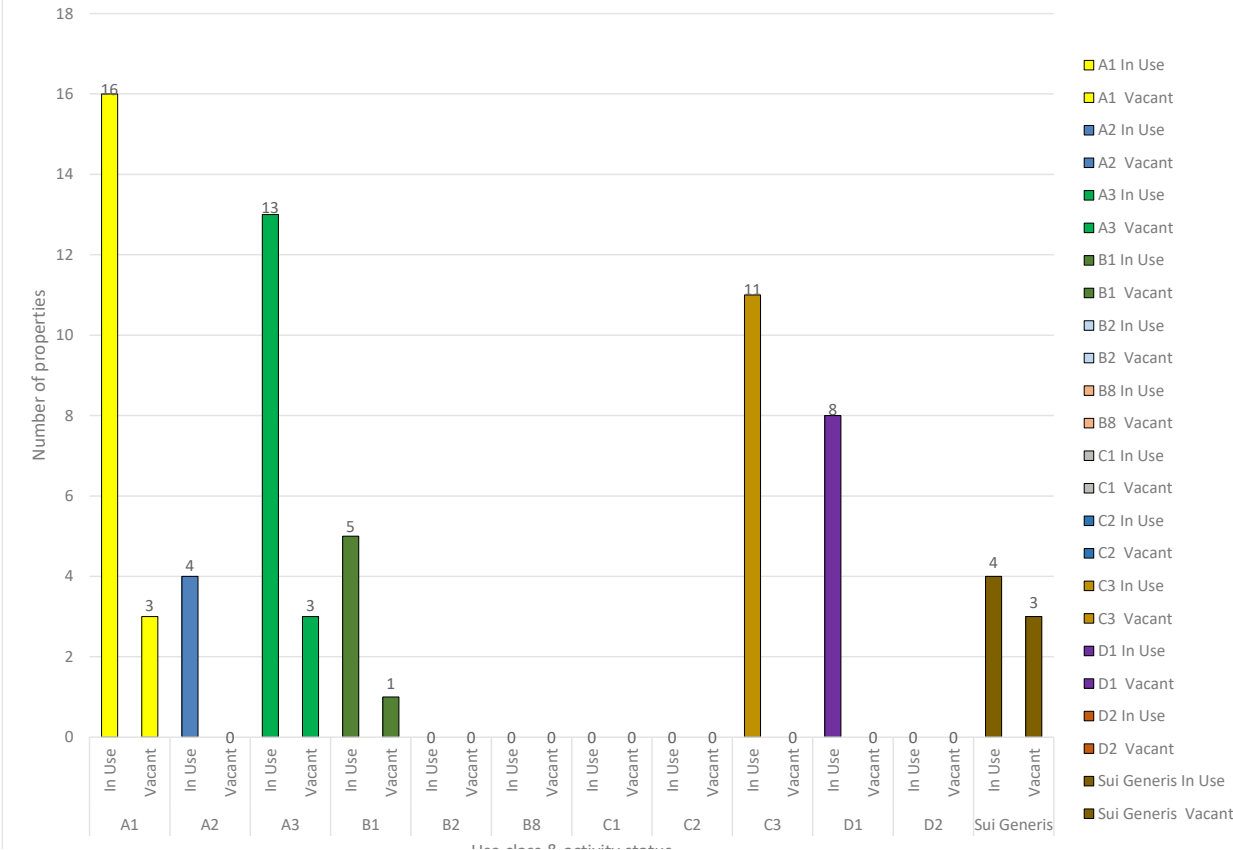
Vacancy Rates



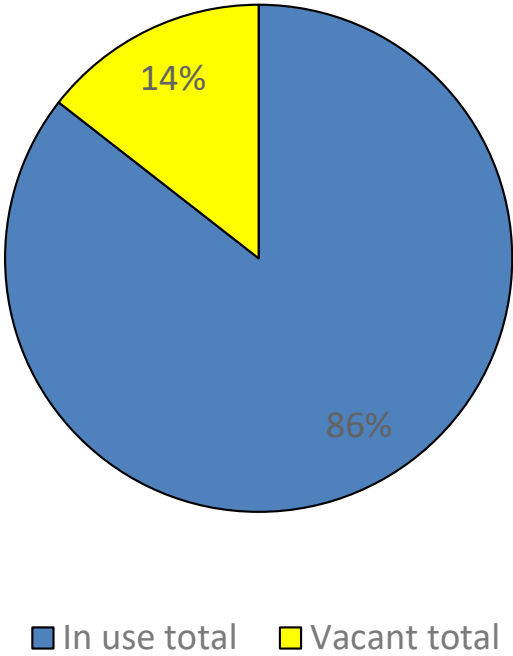
In use total Vacant total

Ammanford - Activity by Use Class (including Vacant Units)

Ammanford Town Centre
(Excluding Primary & Secondary Retail Frontage)



Ammanford Town Centre
(Excluding Primary & Secondary Retail Frontage)

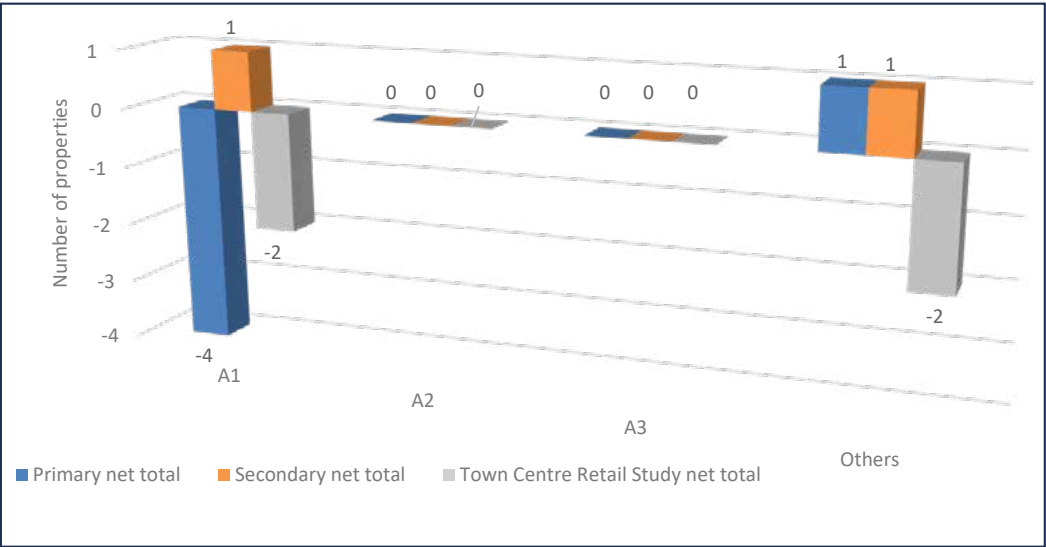


Ammanford - Activity by Use Class (including Vacant Units)

Ammanford Retail Activity Comparision between September 2023 and March 2024

	Primary net total	Secondary net total	Town Centre Retail Study net total	Combined net total
A1	-4	1	-2	-5
A2	0	0	0	0
A3	0	0	0	0
Others	1	1	-2	0
Total	-3	2	-4	-5

Ammanford net gain/loss of in Use Retail Space between September 2023 and March 2024



Town Centre (Service Centres)

LDP Commentary

The classification and identification of Town Centres (Service Centres) through policy RT5 of the LDP reflects the role of the respective centre and the settlements position within the settlement hierarchy. The following settlements are identified within the Retail

Hierarchy (Policy RT1) as Town Centres:

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

In identifying such centres the LDP recognises their role in serving their communities and the sustainability and social inclusivity benefits. The LDP also recognises that such centres are not solely dominated by retail units. Policy RT5 of the adopted LDP does however seek to provide a framework for the consideration of non retail proposals on ground floors. In this respect it seeks to ensure the retail character and vitality and viability of such centres is maintained.

Such centres are often focused on meeting the retail needs of residents and broader communities through a range of offers. They can also be characterised by a mix of town centre uses including leisure and office which at the appropriate scale enhance their contribution to the area and the vitality and viability. It is also noted that historically such town centres also incorporate residential properties, this typifies the character of such areas and the traditional mix of uses.



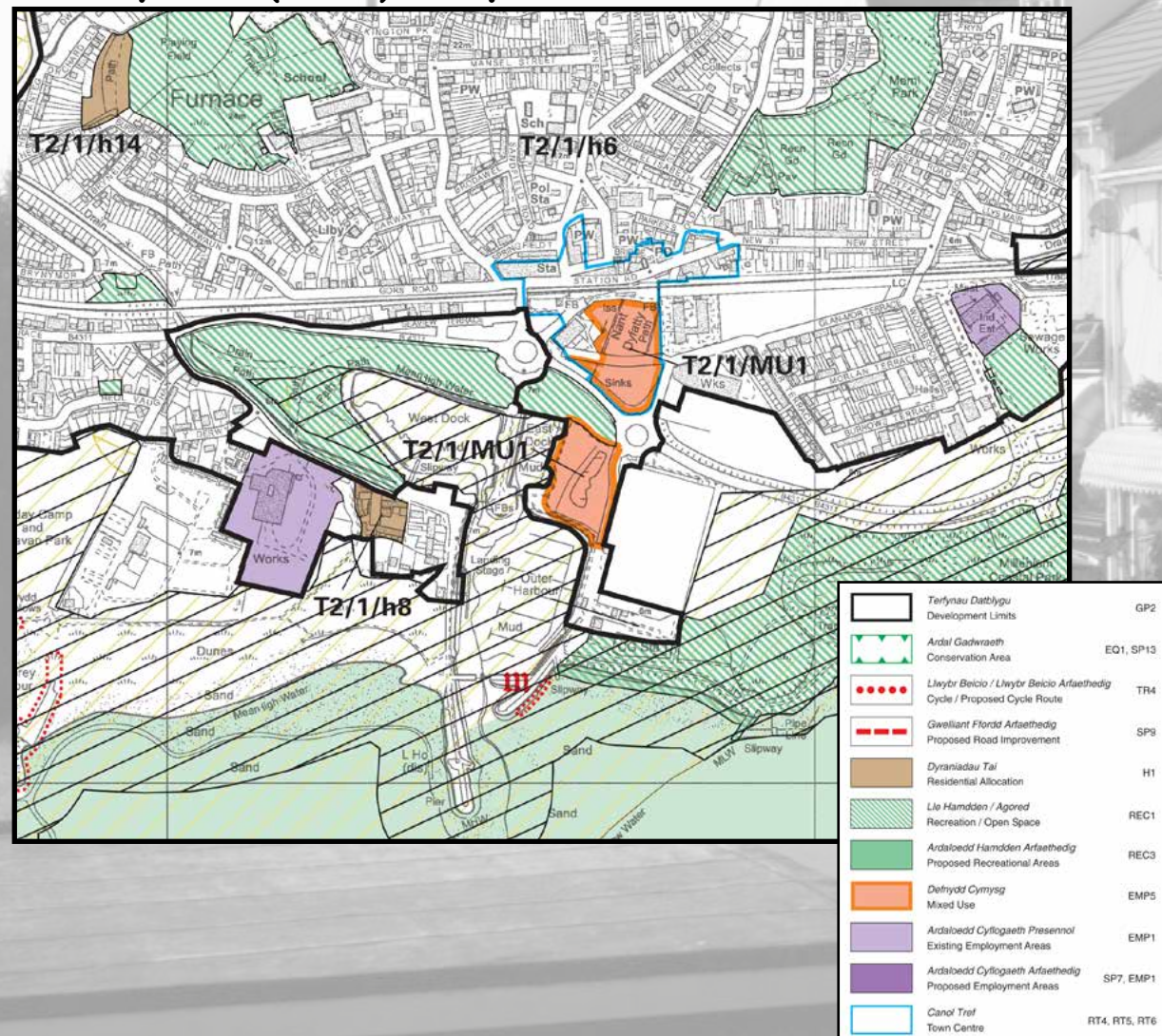


Burry Port (Service Centre)

Background

The town centre boundary for Burry Port provides local retail offer incorporating a mix of convenience and comparison retailers. Centred on Station Road the town centre boundary is dissected by the railway line and incorporates T2/1/MU1 mixed use allocation which provides an opportunity to deliver a suitable retail provision.

Burry Port (T2/1): Adopted LDP - Extract

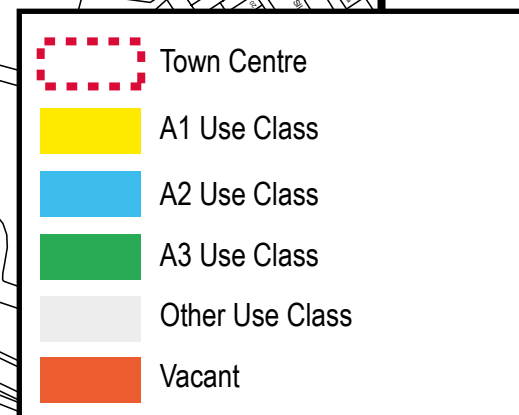


The map displays the coastal town of Burry Port / Porth Tywyn. A red dashed line delineates the 'Town Centre' area, which includes several buildings colored by use class: yellow for A1 (retail), blue for A2 (business), green for A3 (public services), grey for other uses, and orange for vacant land. Key locations include the 'Pembrey & Burry Port Station', 'Neptune Building', 'Church', 'Club', and 'El Sub Sta'. The map also shows the 'Mean High Water' line, 'West Dock', 'East Dock', and various streets like 'Carway Street', 'Springfield Road', and 'New Street'. A legend in the bottom right corner defines the symbols and colors used.

BURRY PORT / PORTH TYWYN

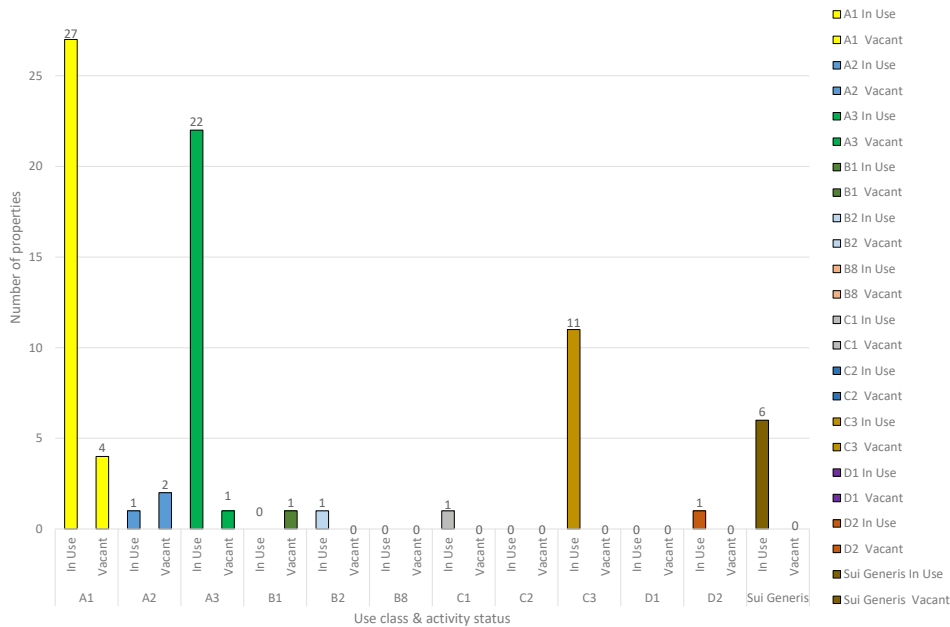
Legend:

- Town Centre (Red dashed line)
- A1 Use Class (Yellow)
- A2 Use Class (Blue)
- A3 Use Class (Green)
- Other Use Class (Grey)
- Vacant (Orange)

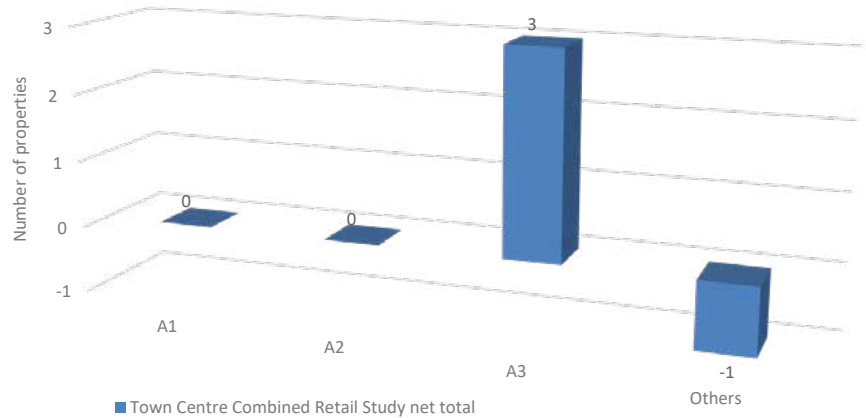


Burry Port (Service Centre)

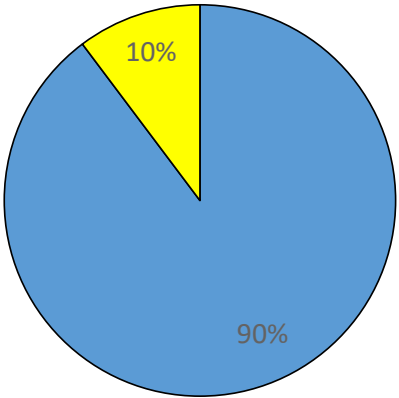
Burry Port Retail Activity by Use Class (including Vacant Units)



Burry Port net gain/loss of In Use between March 2023 and March 2024

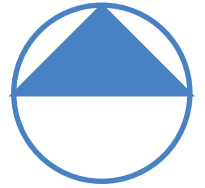


Burry Port Retail Vacancy Rates



In use total Vacant total



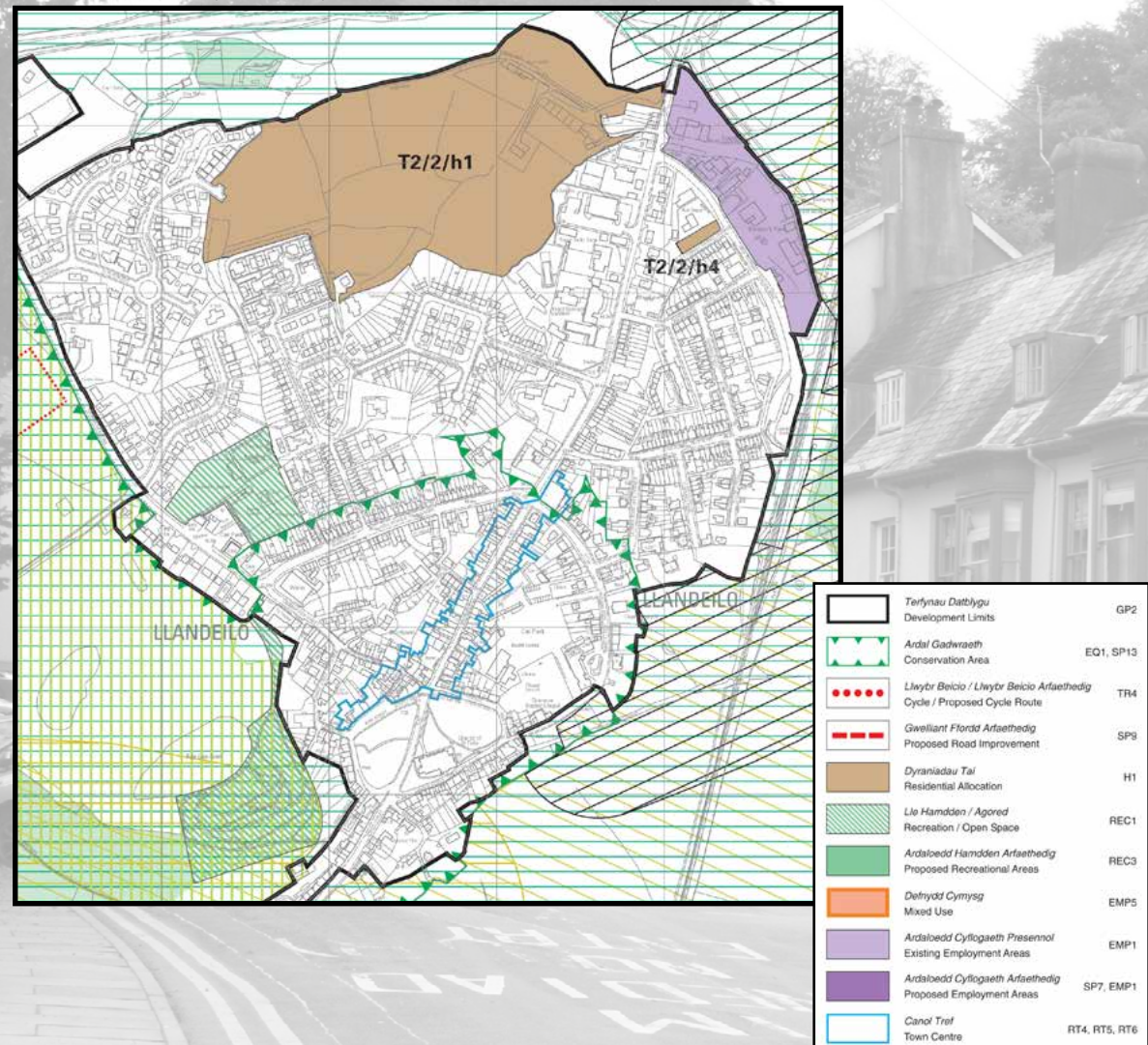


Llandeilo (Service Centre)

Background

Llandeilo has an established retail centre reflective of its market town status and serves a broader hinterland. The retail offer makes provision for local requirements whilst also developing a reputation for quality provision serving niche retail markets. In this respect the settlement has been successful in establishing itself as a destination in retail terms.

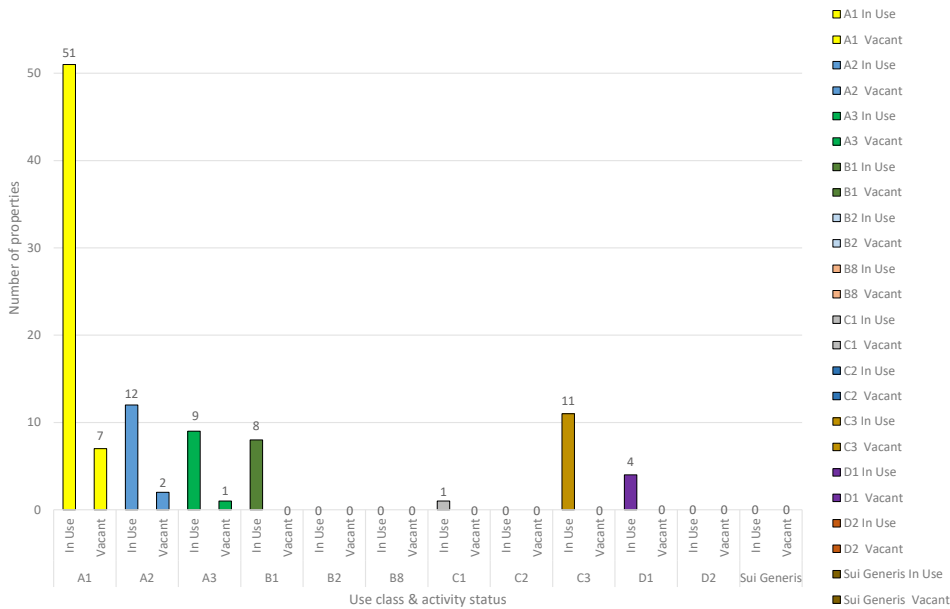
Llandeilo (T2/2): Adopted LDP - Extract



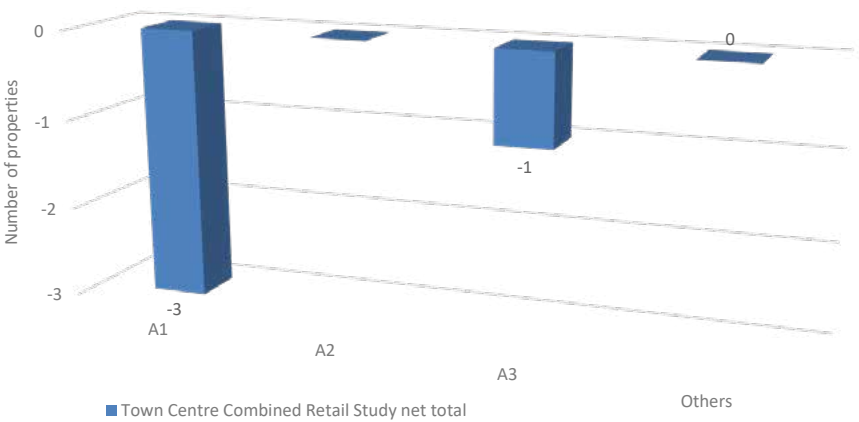
[illegible]

Llandeilo (Service Centre)

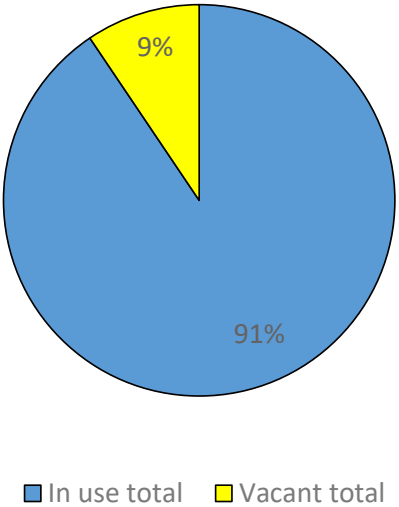
Llandeilo Retail Activity by Use Class (including Vacant Units)



Llandeilo net gain/loss of In Use between March 2023 and March 2024



Llandeilo Retail Vacancy Rates



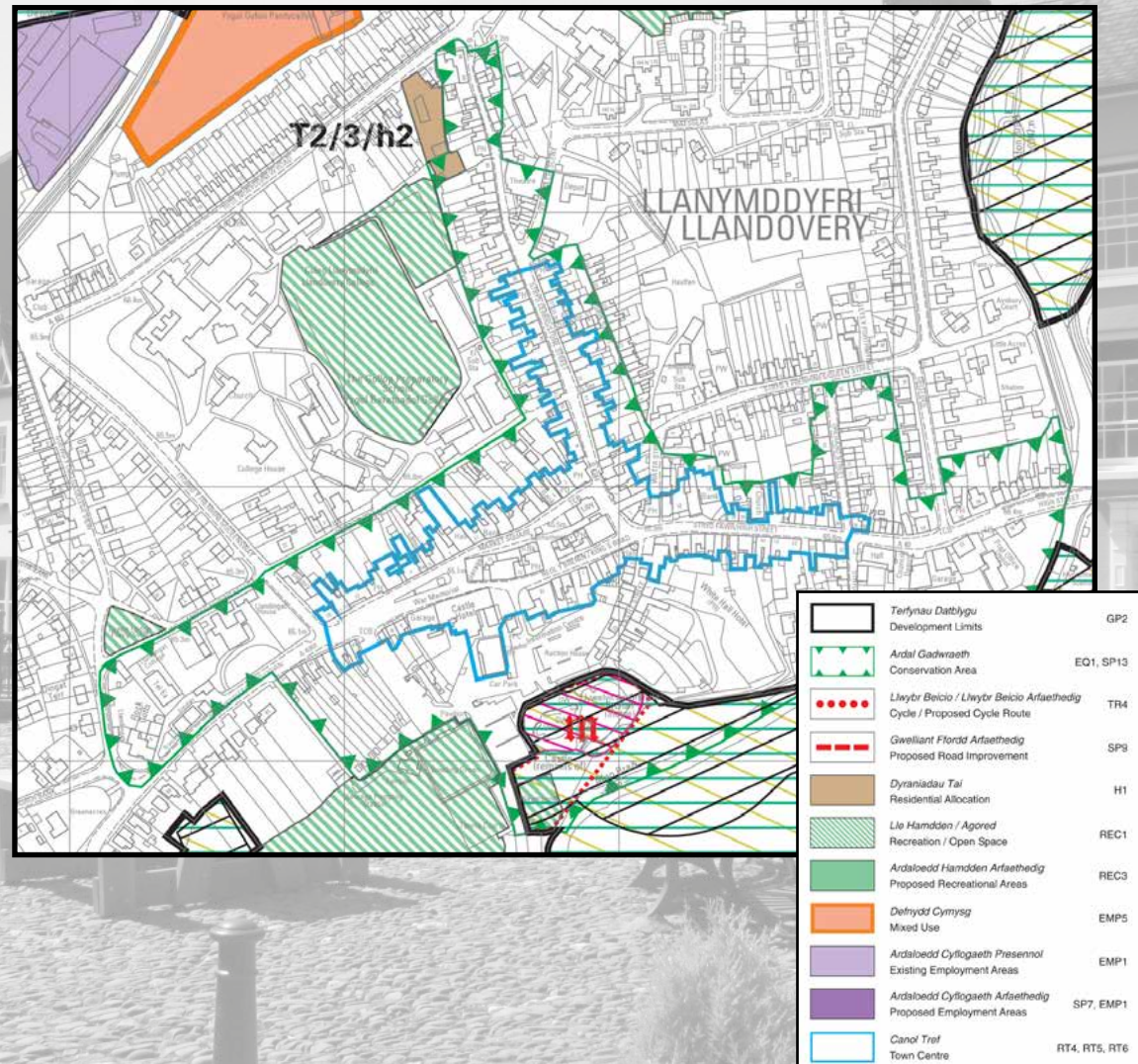
Llandovery (Service Centre)

Background

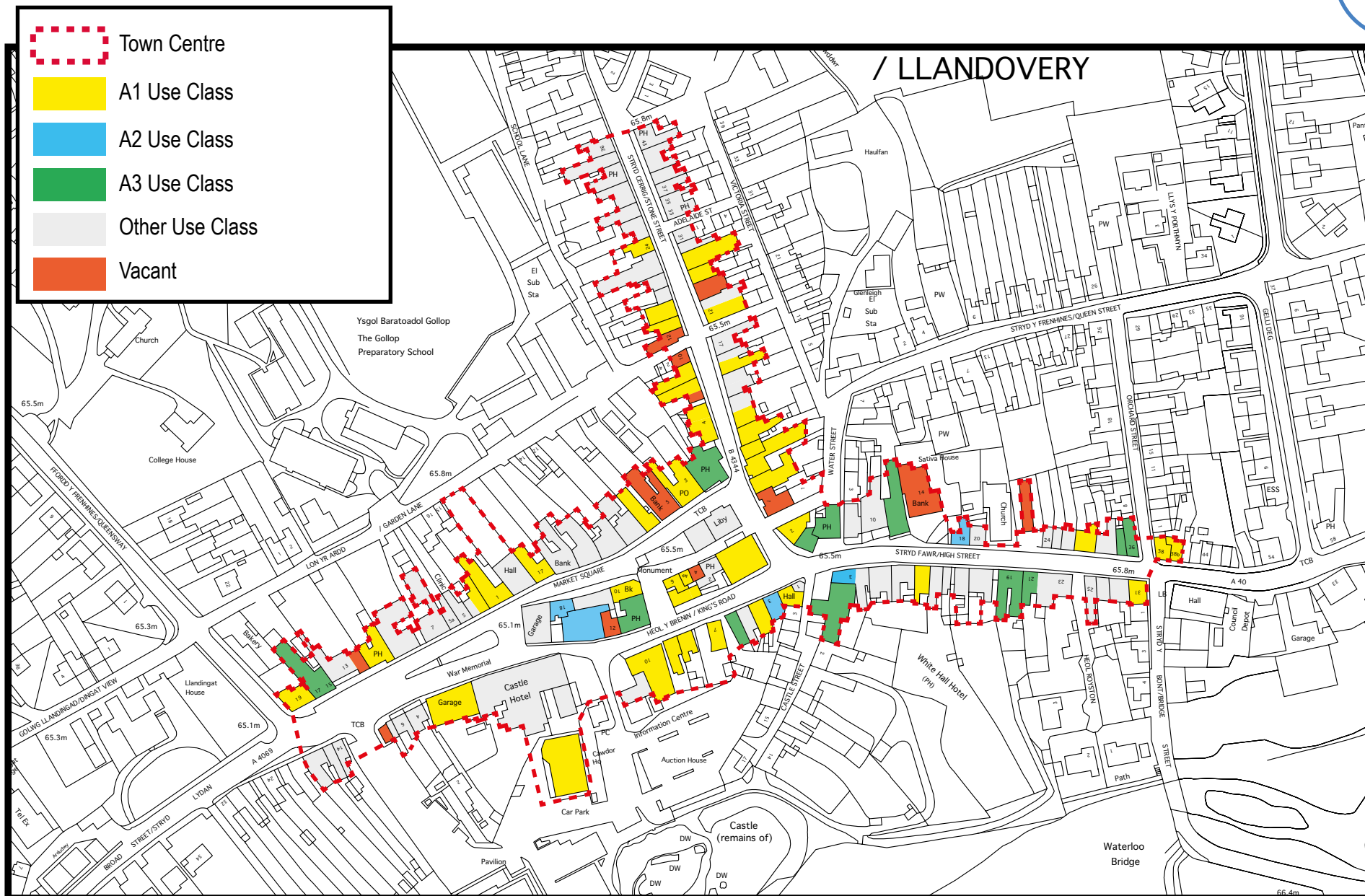
The settlement has historically performed an important retail role serving a wider community. Focused around a historic town centre this market town incorporates predominantly independent and local retailers with limited national chain representation.



Llandovery (T2/3): Adopted LDP - Extract

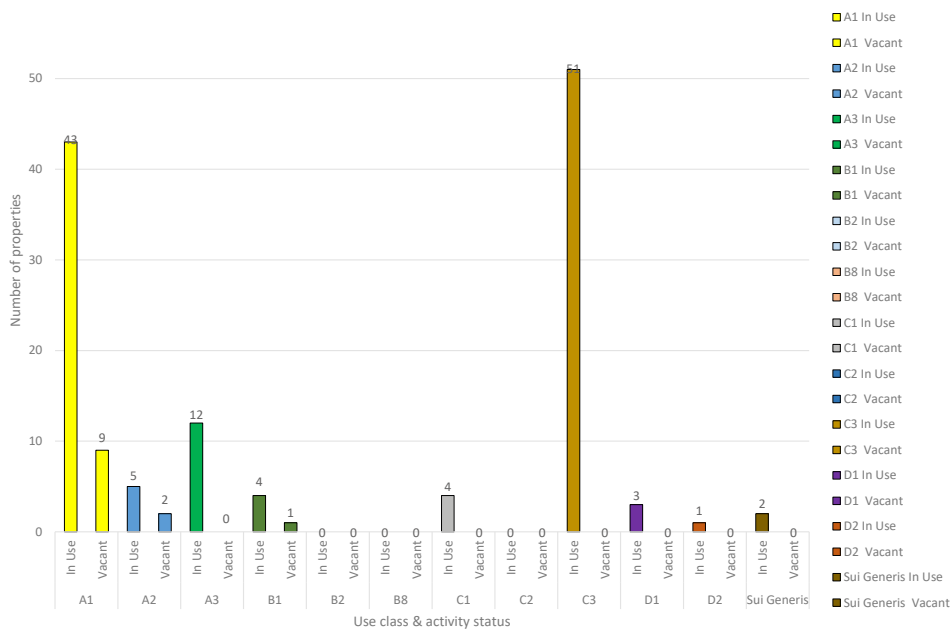


/ LLANDOVERY

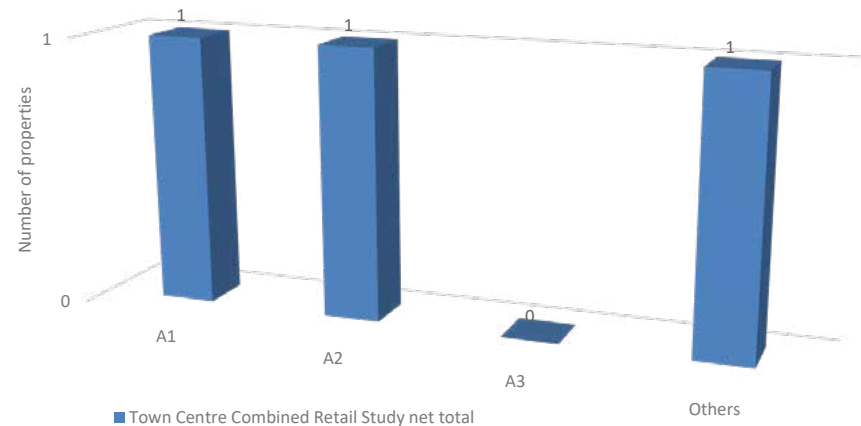


Llandovery (Service Centre)

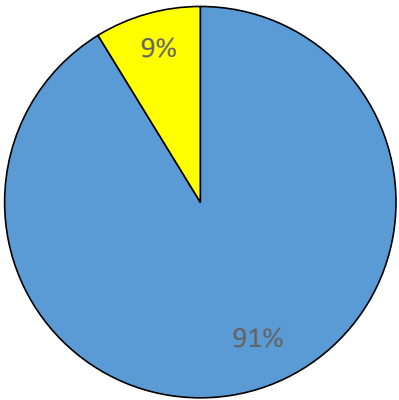
Llandovery Retail Activity by Use Class (including Vacant Units)



Llandovery net gain/loss of In Use between March 2023 and March 2024



Llandovery Retail Vacancy Rates



■ In use total ■ Vacant total

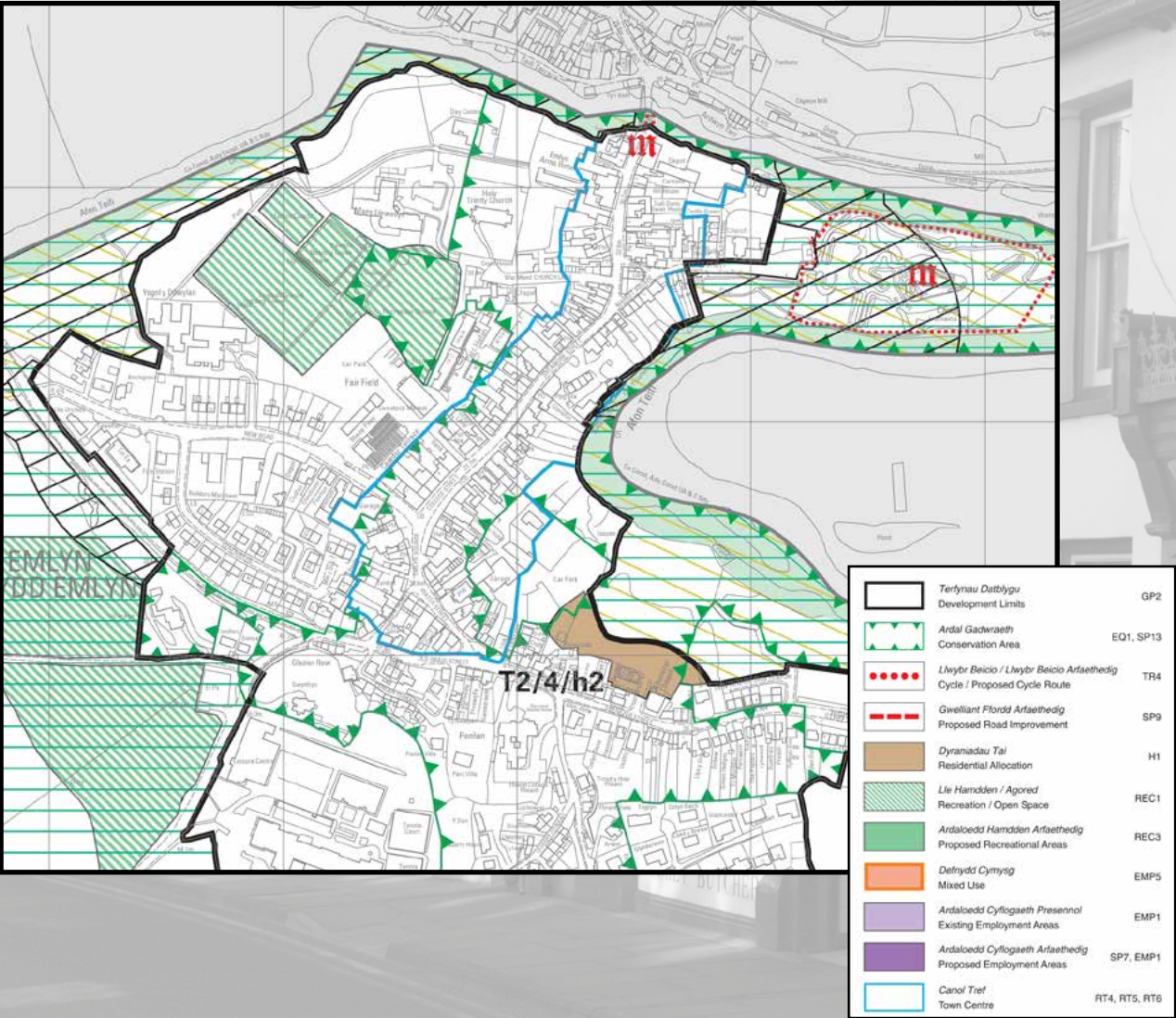


Newcastle Emlyn (Service Centre)

Background

Serving a wider area Newcastle Emlyn represents an important rural market town with an established town centre. In retail terms the settlement is served by a mix of comparison and convenience provision with the town centre predominantly independent and local retailers with some national representation.

Newcastle Emlyn (T2/4): Adopted LDP - Extract



The map displays the town of Llanidloes, Wales, with buildings color-coded by use class. A red dashed line delineates the town center. The legend indicates the following categories:

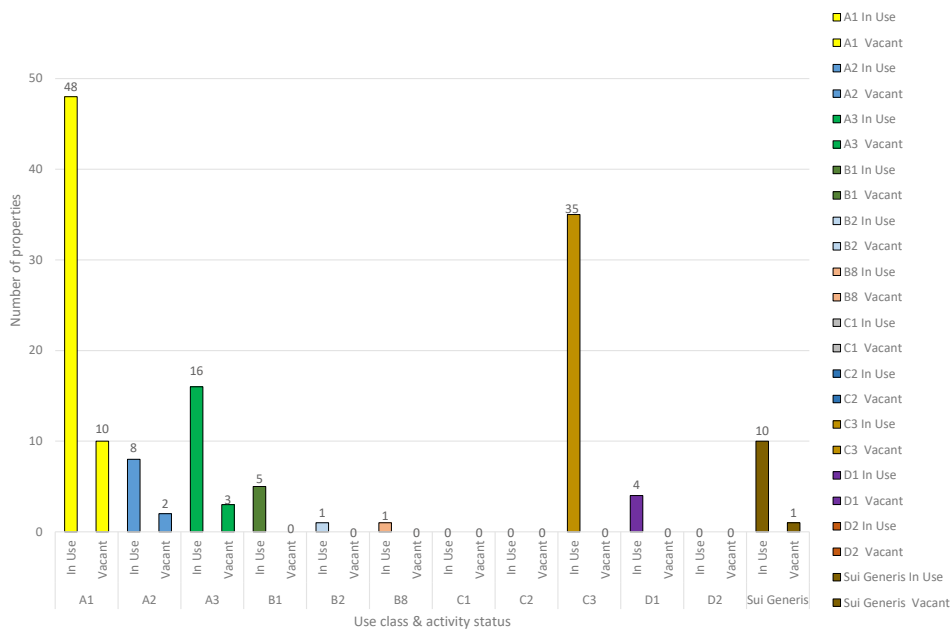
- Town Centre:** Indicated by a red dashed line.
- A1 Use Class:** Yellow.
- A2 Use Class:** Blue.
- A3 Use Class:** Green.
- Other Use Class:** Grey.
- Vacant:** Orange.

Key locations and features labeled on the map include:

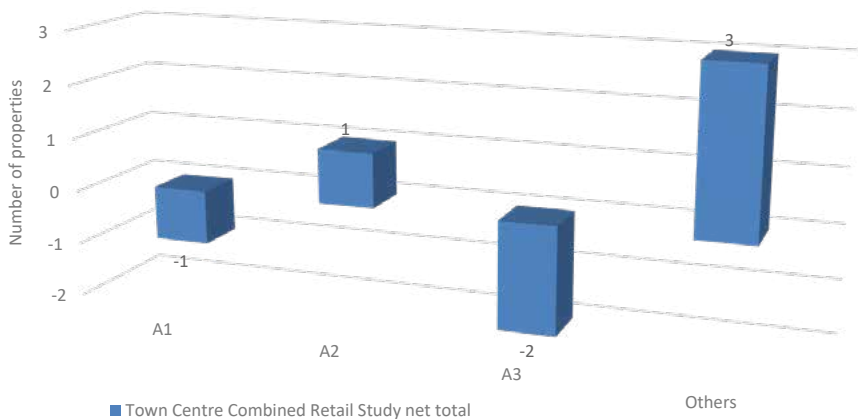
- Streets:** Church Lane, Market Street, Water Street, Old Graig Street, Penlan Terrace, Fernant Salvage, and others.
- Buildings:** Trinity Church, Emlyn Arms Hotel, Depot, Castle Green, Church, Car Park, Recreation Ground, Livestock Market, Garage, Ivy Bush (PH), Penlan, Fferntant, and others.
- Landmarks:** Maes Llewellyn, Pavilion, Bowling Green, Play Area, Path, School House, Chapel, and others.
- Water Features:** Alfon Telfi river.
- Roads:** A475.

Newcastle Emlyn (Service Centre)

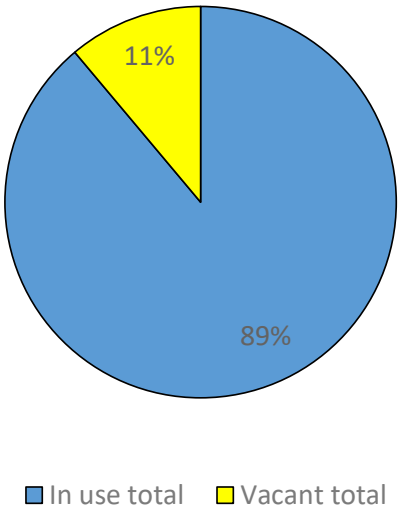
Newcastle Emlyn Retail Activity by Use Class (including Vacant Units)



Newcastle Emlyn net gain/loss of In Use between March 2023 and March 2024



Newcastle Emlyn Retail Vacancy Rates



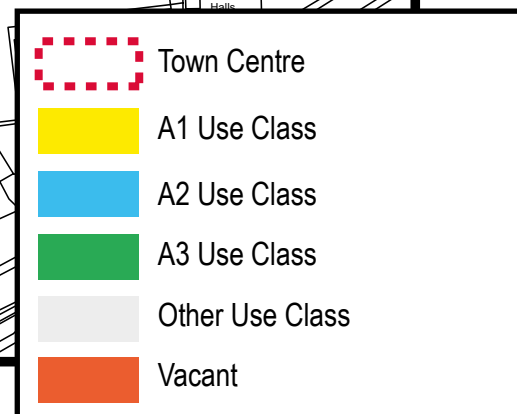
St. Clears (Service Centre)

Background

The retail offer within St. Clears is predominantly focused within the town centre boundary and broadly on meeting local provision. Incorporating a mix of convenience and comparison retailers there is limited national high street representation.

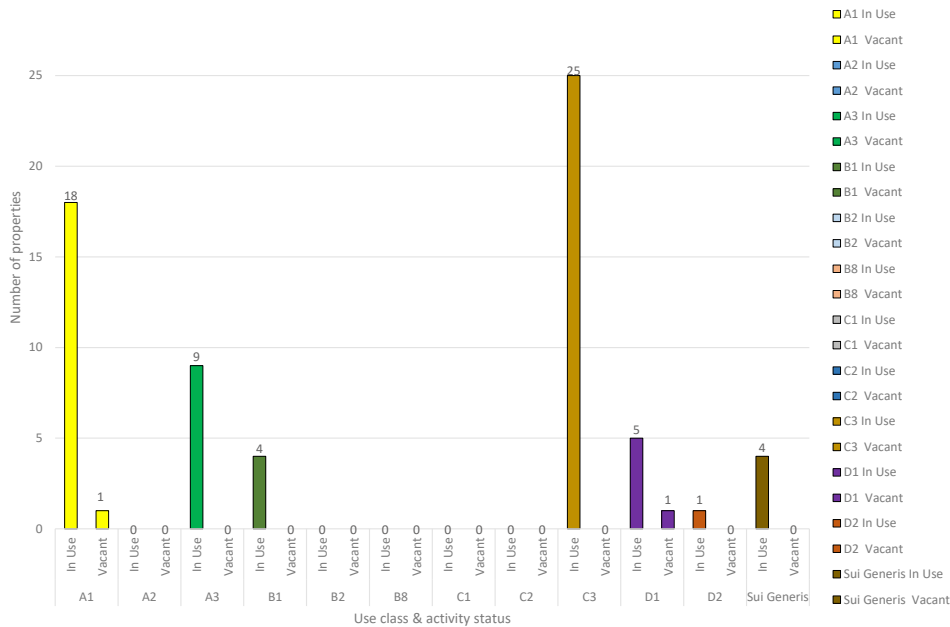
St. Clears (T2/5): Adopted LDP - Extract



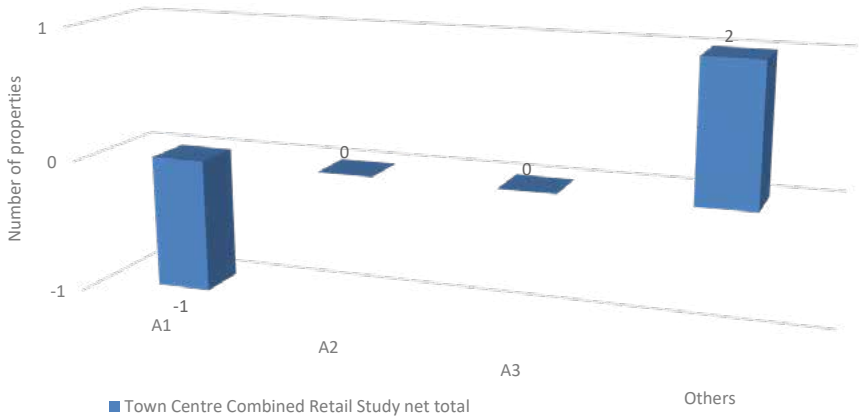
[illegible]

St. Clears (Service Centre)

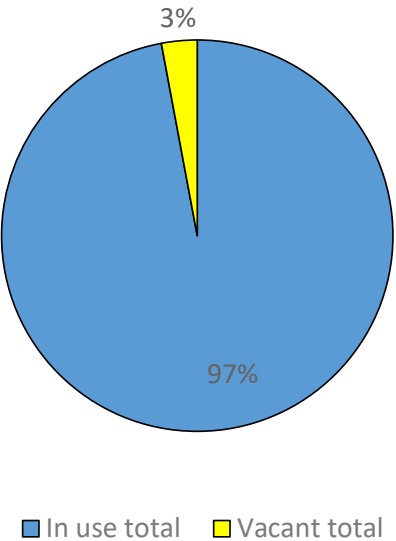
St. Clears Retail Activity by Use Class (including Vacant Units)



St. Clears net gain/loss of In Use between March 2023 and March 2024



St. Clears Retail Vacancy Rates

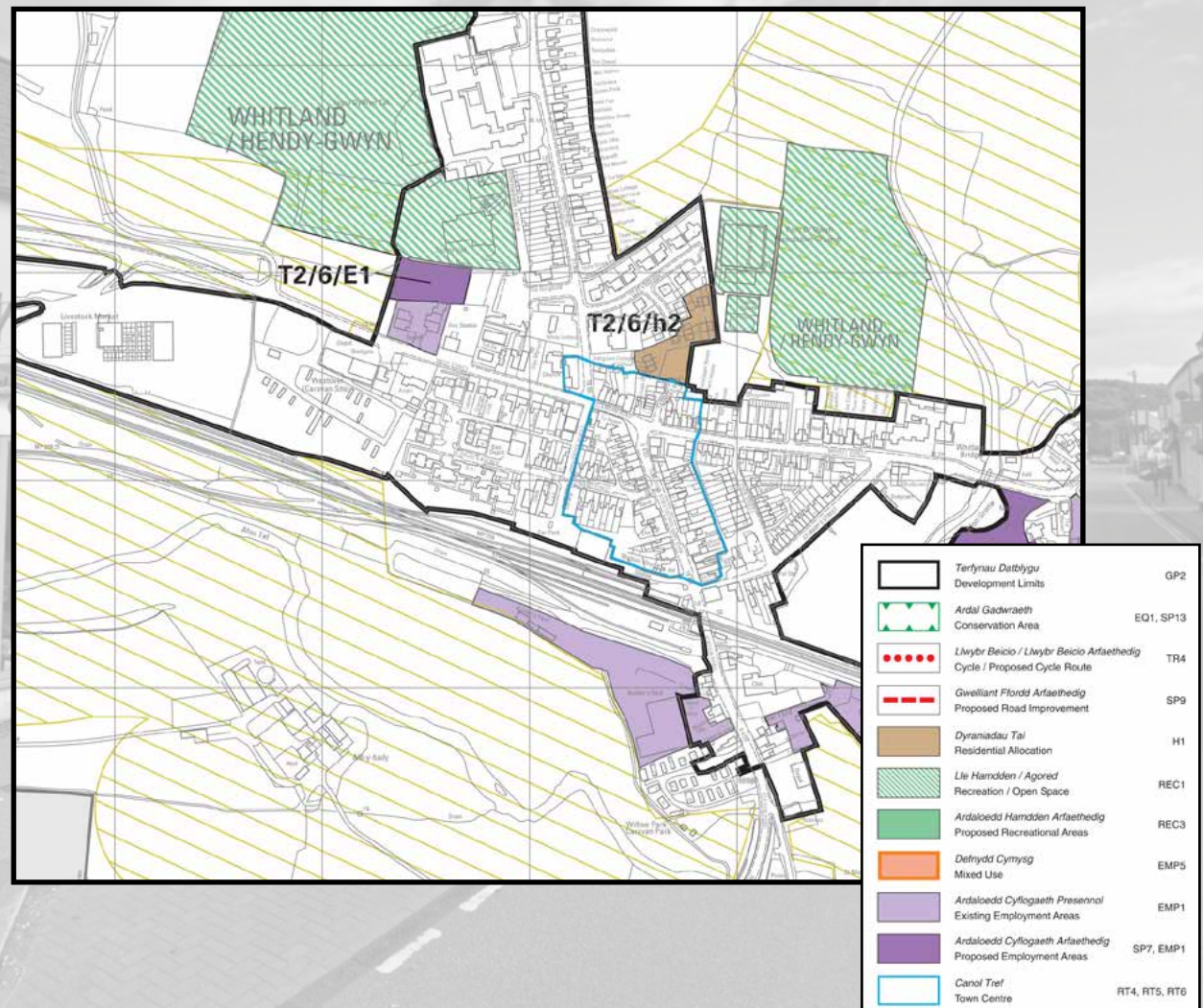


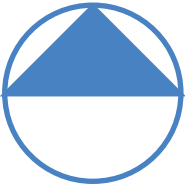
Whitland (Service Centre)

Background

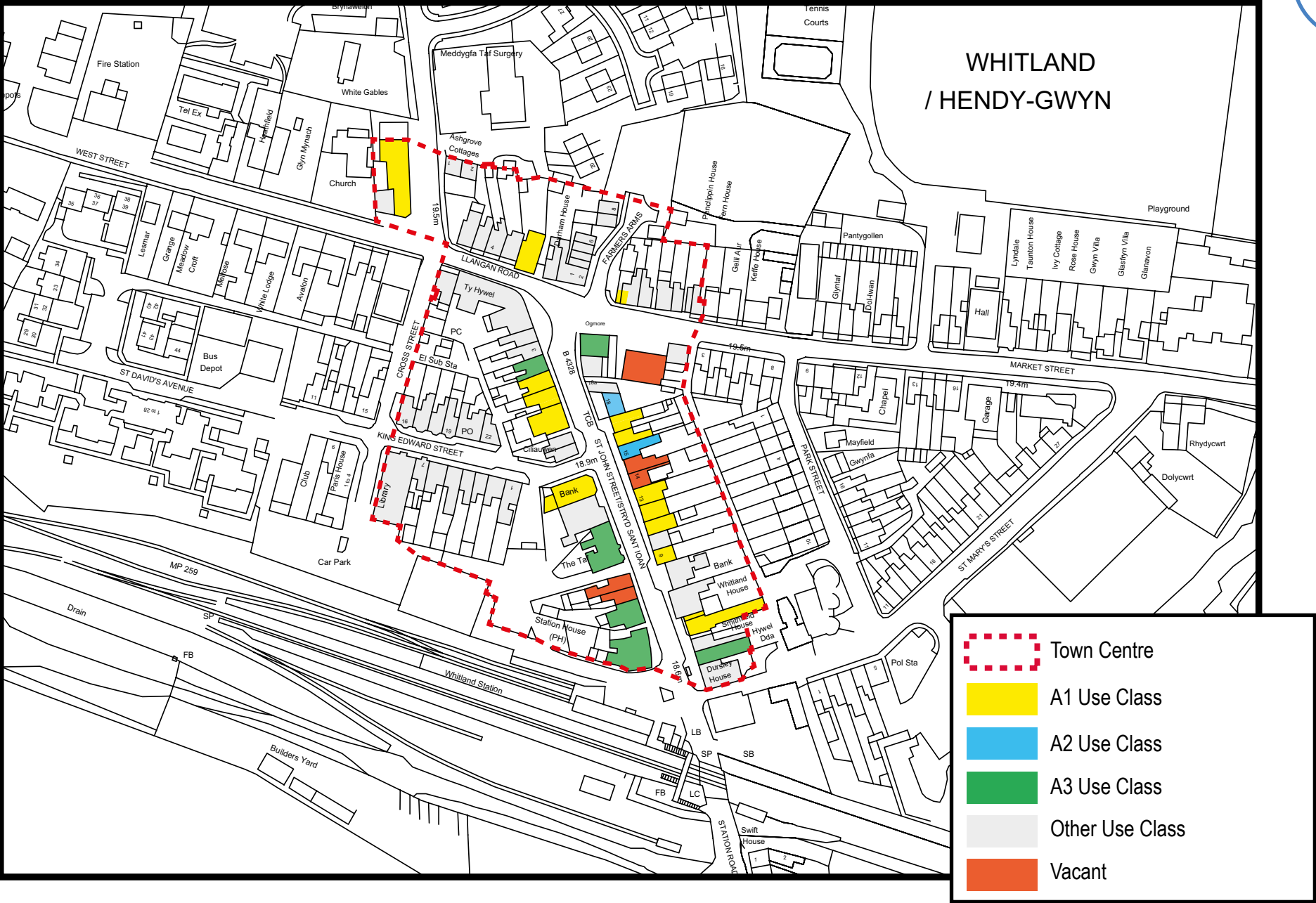
Focused predominately on St. John's Street, Whitland, as with other Service Centre settlements, provides an important retail offer serving the local and wider community. In retail terms the settlement is served by a mix of provision with the town centre predominantly consisting of independent and local retailers with national representation limited to convenience retailers.

Whitland (T2/6): Adopted LDP - Extract



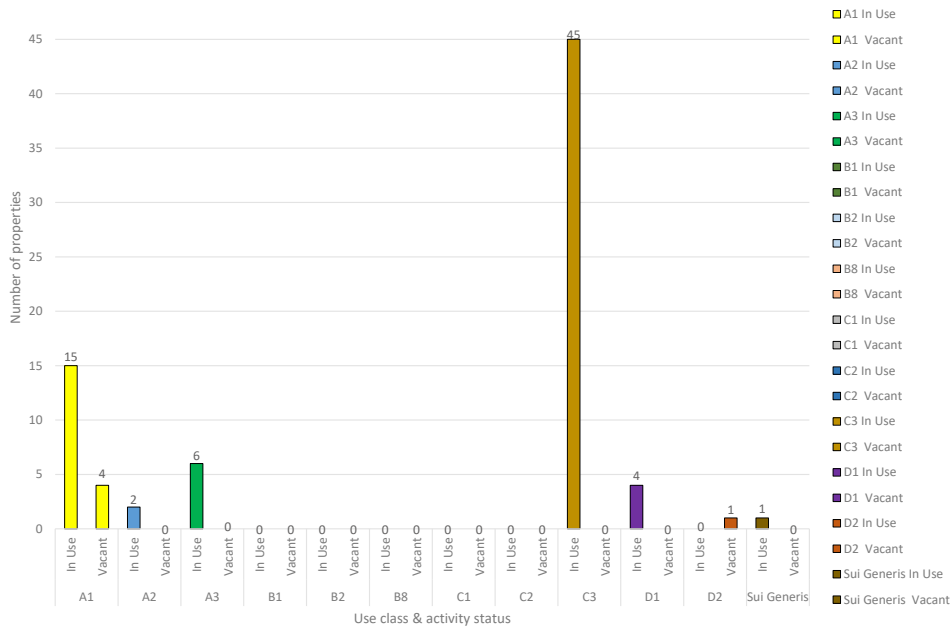


Whitland - Activity by Use Class (including Vacant Units)

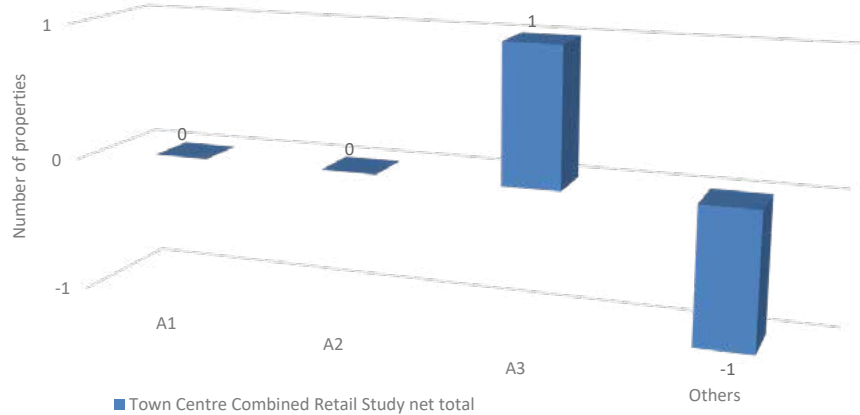


Whitland (Service Centre)

Whitland Retail Activity by Use Class (including Vacant Units)



Whitland net gain/loss of In Use between March 2023 and March 2024



Whitland Retail Vacancy Rates

