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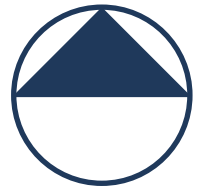
# Town Retail Audit 2023

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

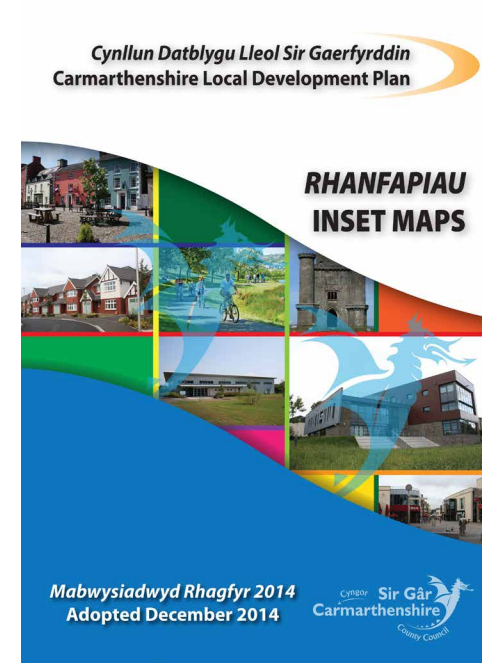
Principal Centres within the LDP's retail hierarchy represent the highest tier and reflects the significance of the respective town centre and the settlement's position within a designated Growth Area (Policy SP3) with the LDP. The following settlements are identified within the Retail Hierarchy (Policy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

- Carmarthen
- Llanelli
- Ammanford

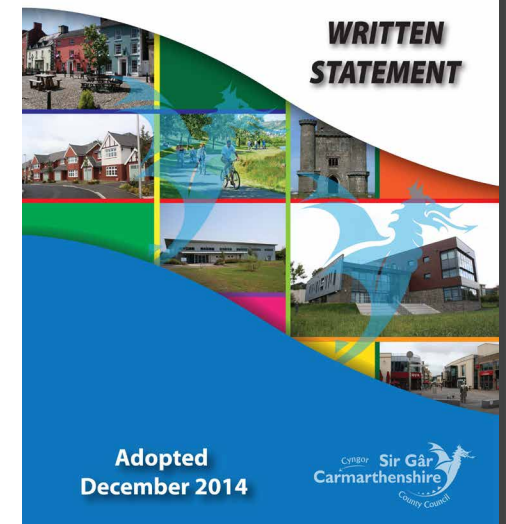
As with all Principal Centres the planning policy provisions include a Primary Retail Frontage (Policy RT2) which seeks to safeguard existing retail (A1) frontage.

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



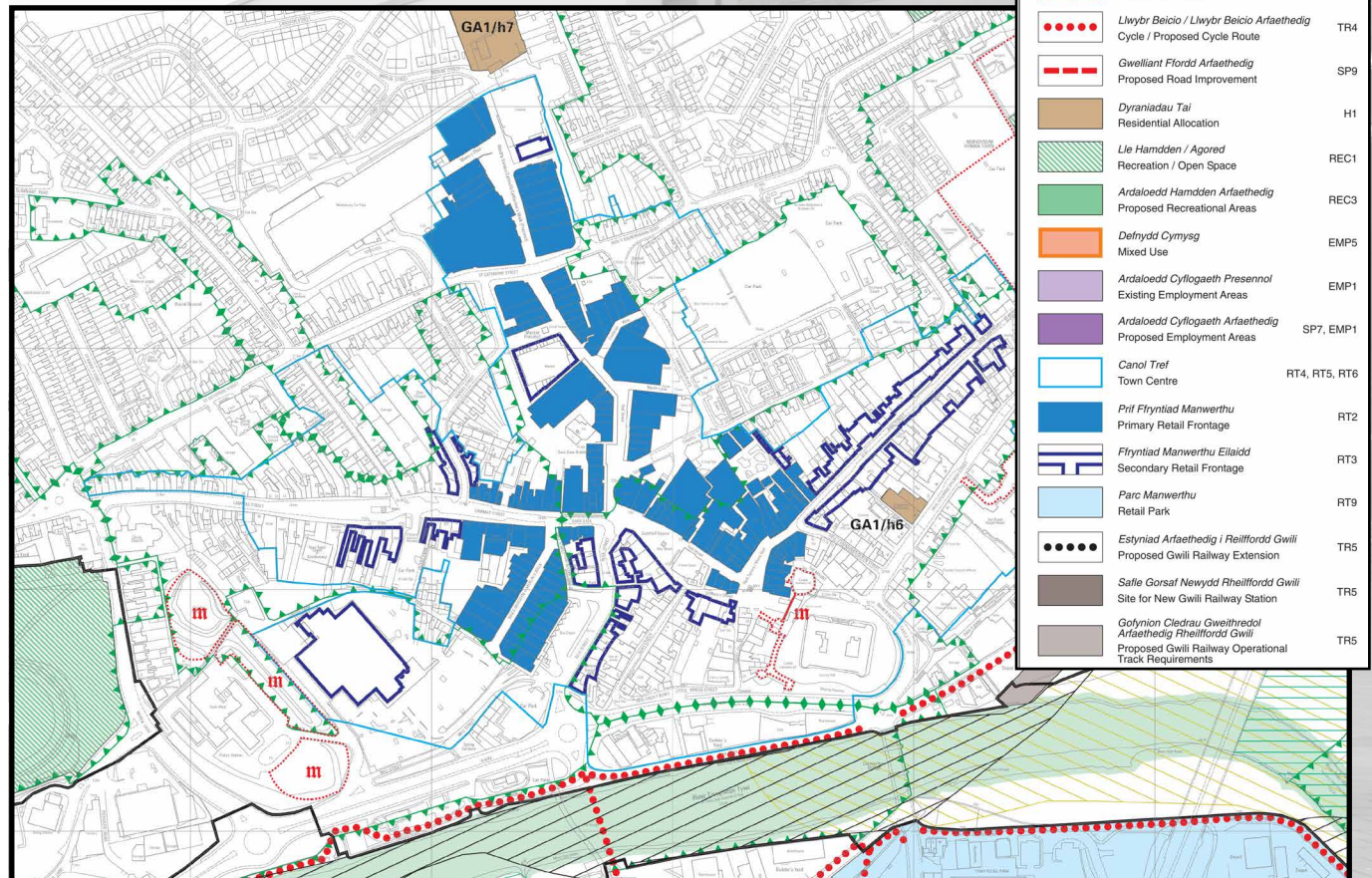


# Carmarthen

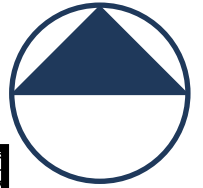
## Background

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.

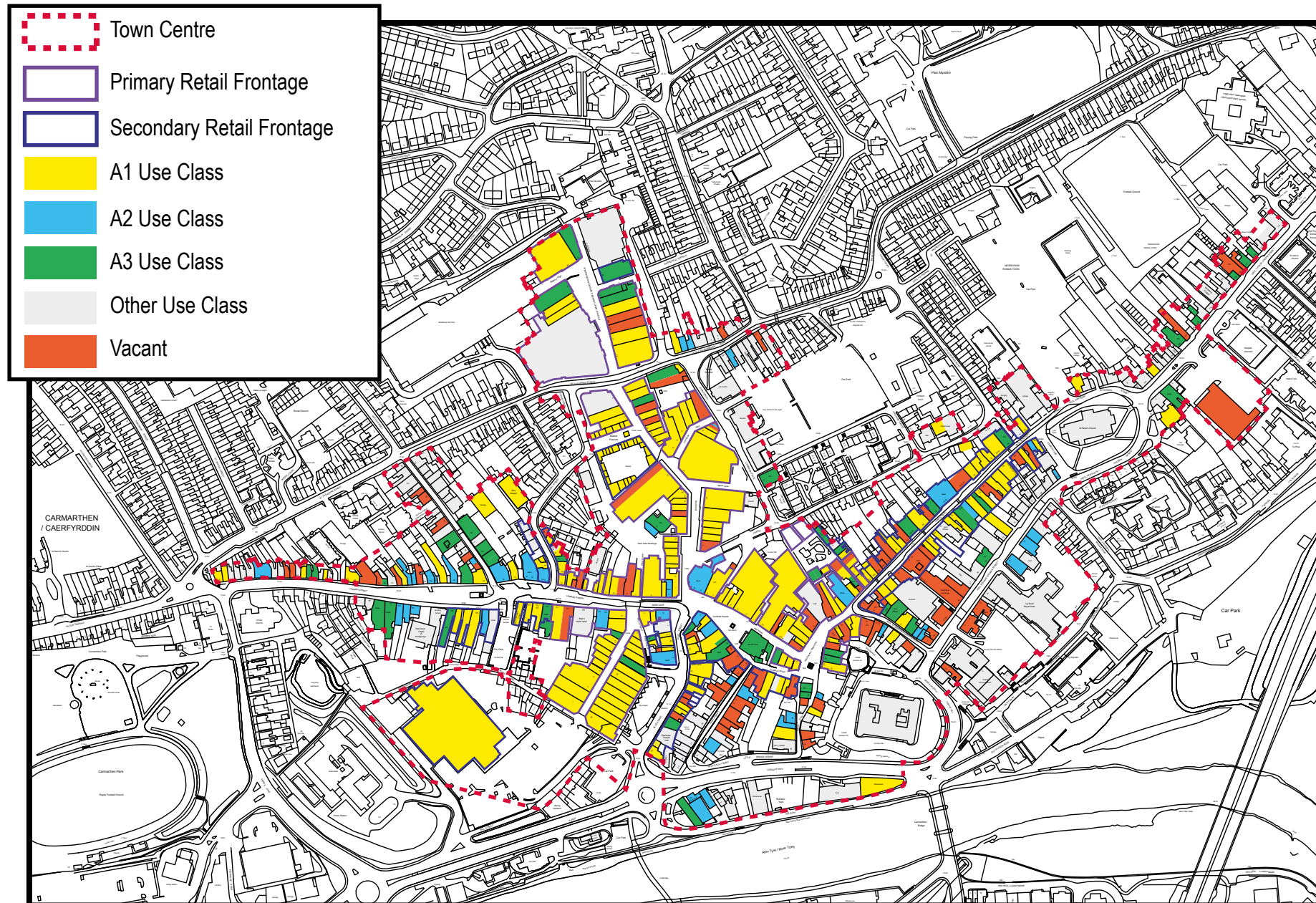
## Carmarthen Town Centre (GA1): Adopted LDP - Extract





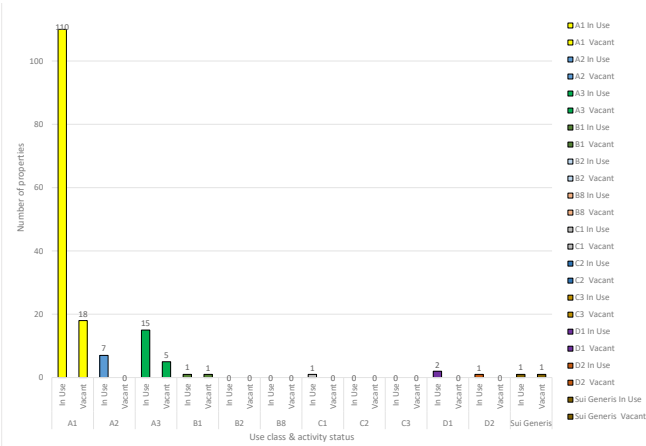


## Carmarthen - Activity by Use Class (including Vacant Units)

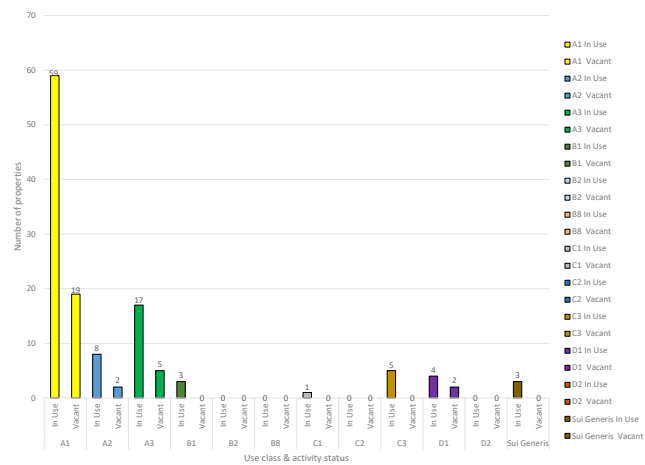


# Carmarthen - Activity by Use Class (including Vacant Units)

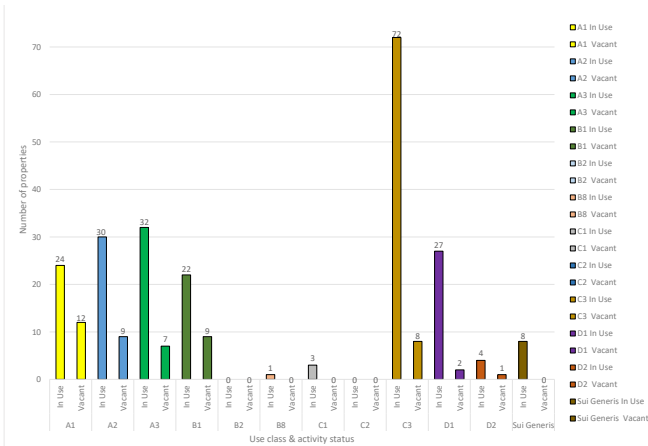
Carmarthen Primary Retail Frontage



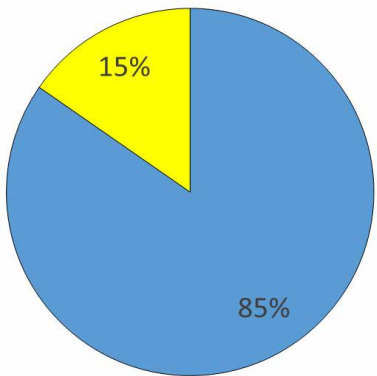
Carmarthen Secondary Retail Frontage



Carmarthen Town Centre  
(Excluding Primary & Secondary Retail Frontage)

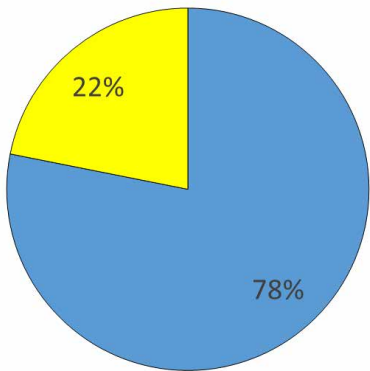


Carmarthen Primary Retail Frontage  
Vacancy Rates



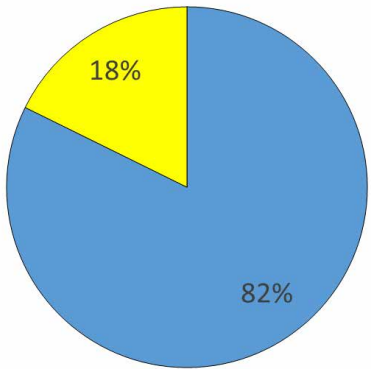
■ In use total ■ Vacant total

Carmarthen Secondary Retail Frontage  
Vacancy Rates



■ In use total ■ Vacant total

Carmarthen Town Centre  
(Excluding Primary & Secondary Retail Frontage)  
Vacancy Rates



■ In use total ■ Vacant total

## Carmarthen - Activity by Use Class (including Vacant Units)

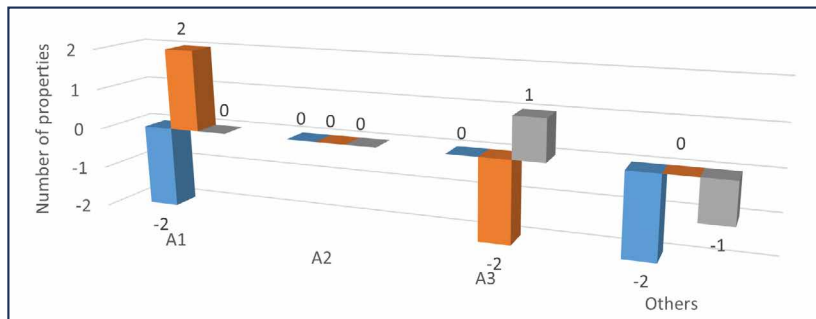
### Carmarthen In Use Retail Activity Comparison between September 2022 and March 2023

	Combined Sept 2022	Combined March 2023	Primary Sept 2022	Primary March 2023	Secondary Sept 2022	Secondary March 2023	Town Centre Retail Study (excluding primary and secondary) Sept 2022	Town Centre Retail Study (excluding primary and secondary) March 2023
A1	193	193	112	110	57	59	24	24
A2	45	45	7	7	8	8	30	30
A3	65	64	15	15	19	17	31	32
Others	162	159	8	6	16	16	138	137

### Carmarthen Retail Activity Comparison between September 2022 and March 2023

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

### Carmarthen net gain/loss of in Use Retail Space between September 2022 and March 2023





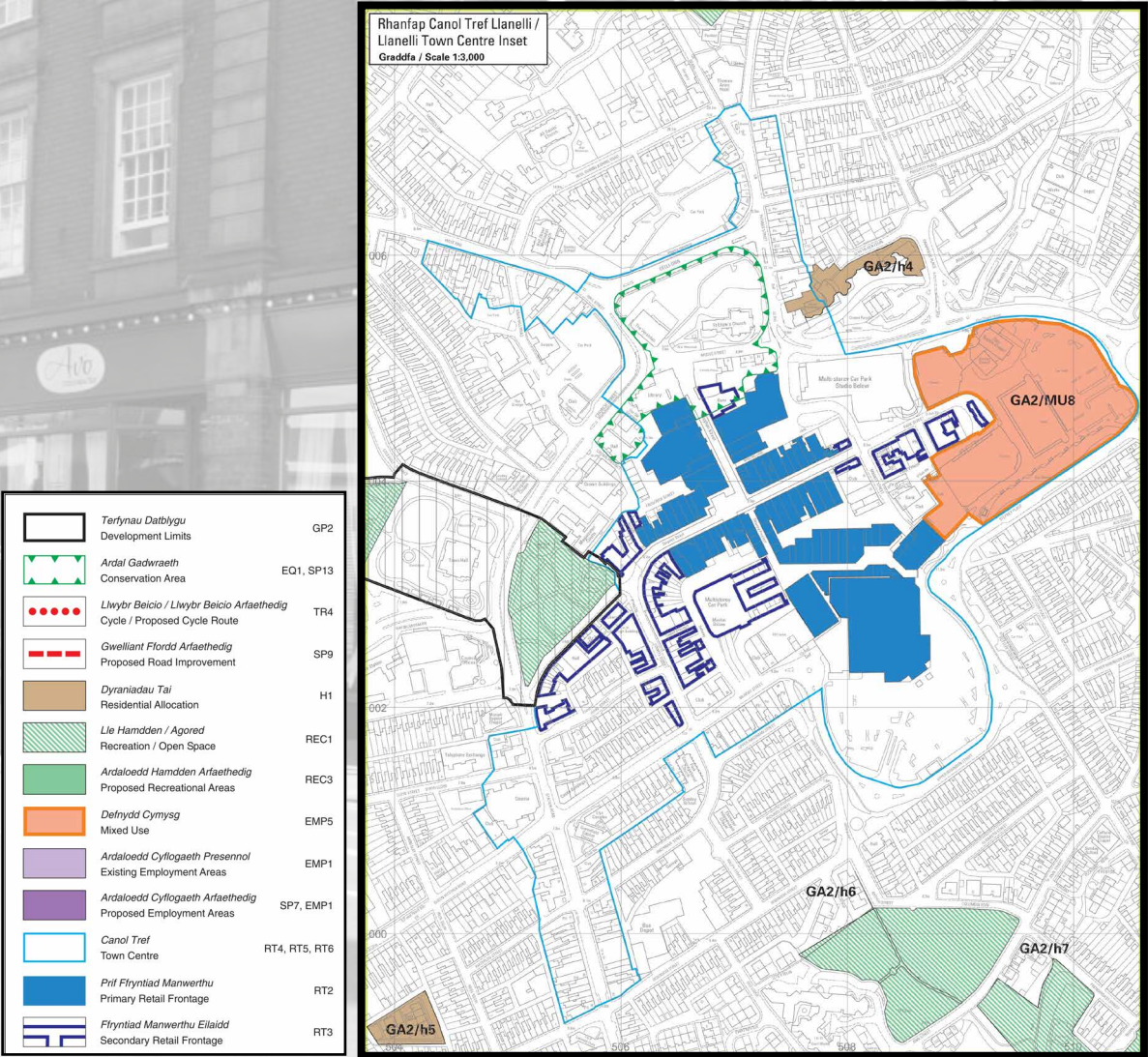
# Llanelli

## 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.



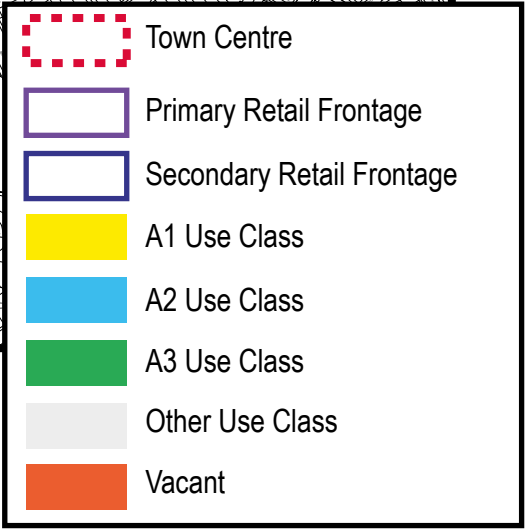
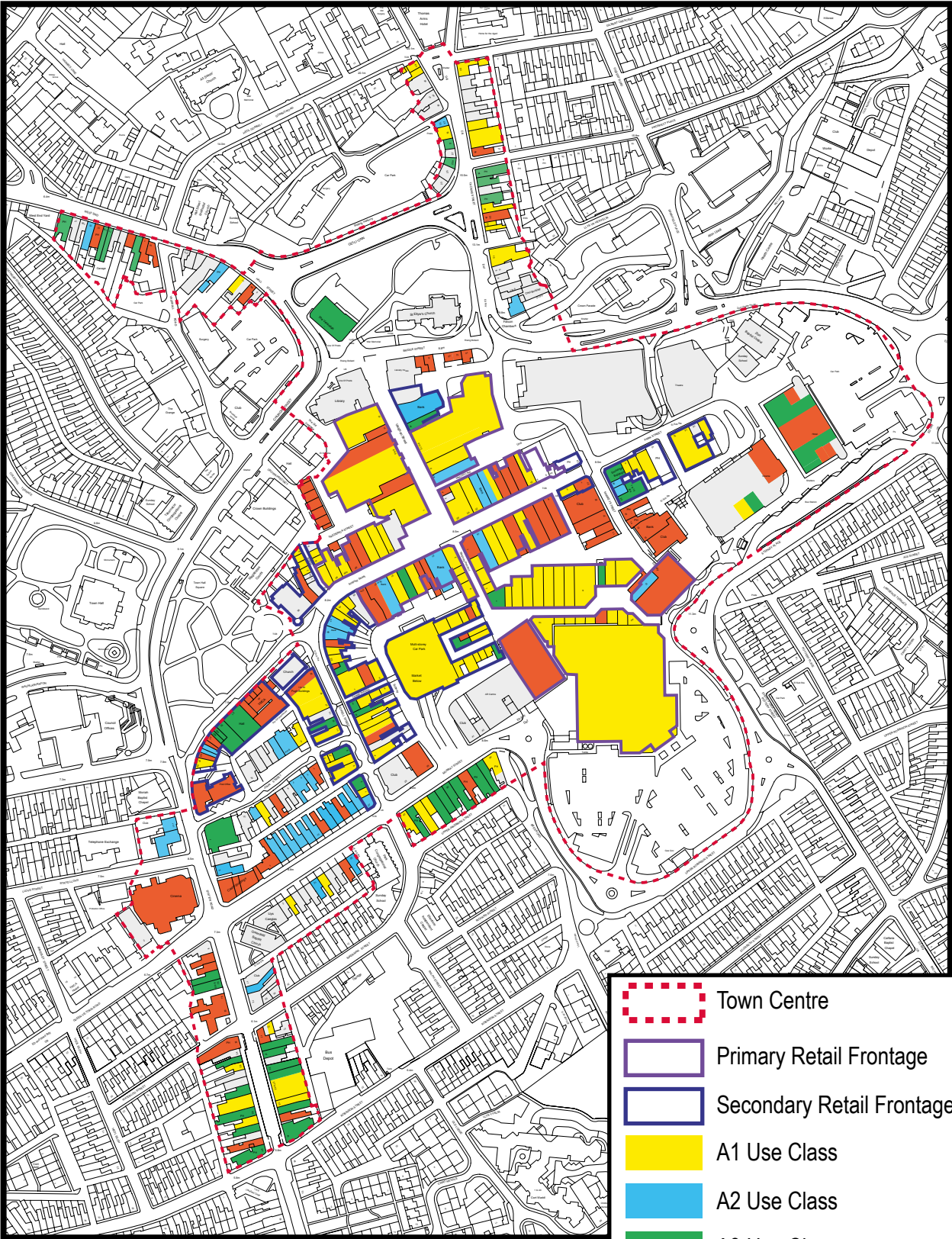
## Llanelli Town Centre (GA2): Adopted LDP - Extract





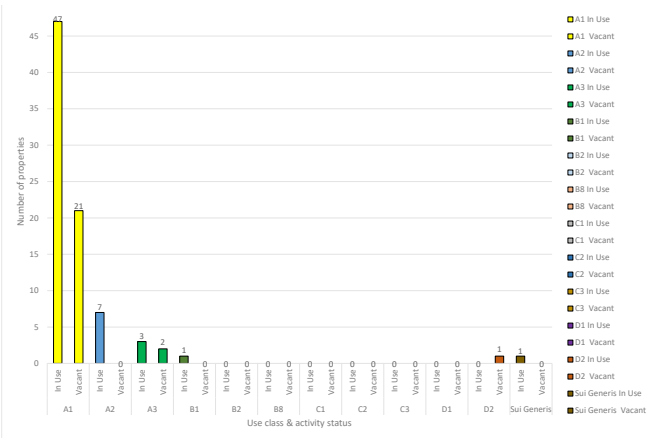


Llanelli - Activity by Use Class (including Vacant Units)

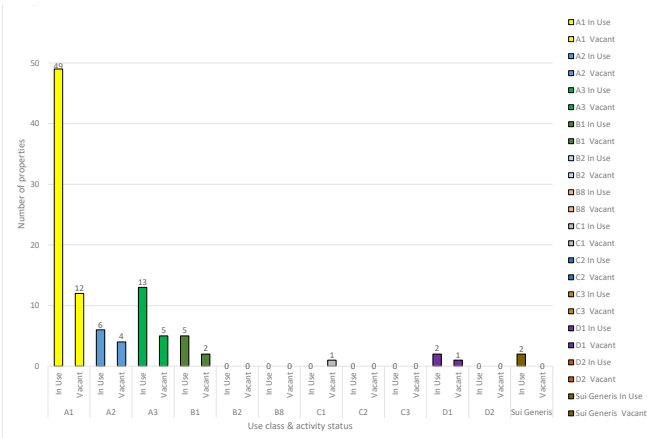


Llanelli - Activity by Use Class (including Vacant Units)

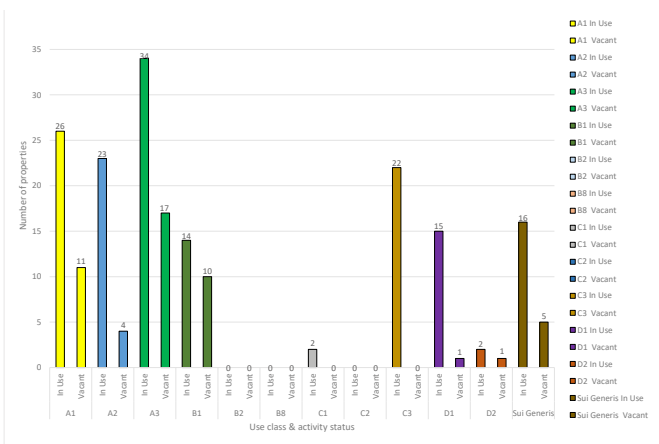
Llanelli Primary Retail Frontage



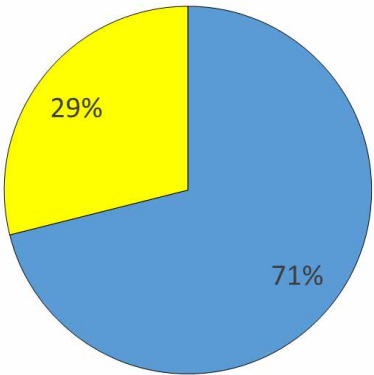
Llanelli Secondary Retail Frontage



Llanelli Town Centre  
(Excluding Primary & Secondary Retail Frontage)

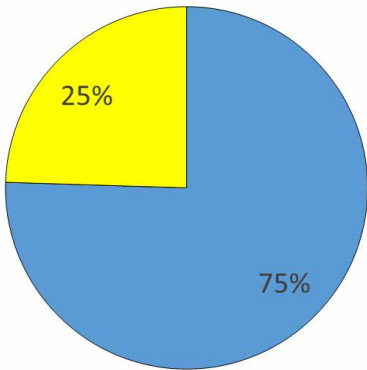


Llanelli Primary Retail Frontage  
Vacancy Rates



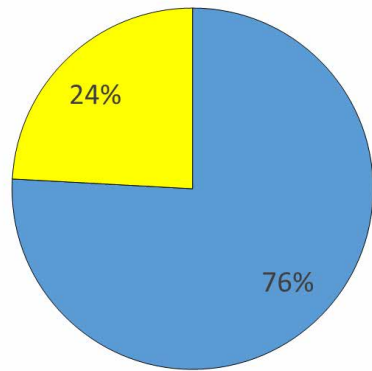
■ In use total ■ Vacant total

Llanelli Secondary Retail Frontage  
Vacancy Rates



■ In use total ■ Vacant total

Llanelli Town Centre  
(Excluding Primary & Secondary Retail Frontage)  
Vacancy Rates



■ In use total ■ Vacant total

Llanelli - Activity by Use Class (including Vacant Units)

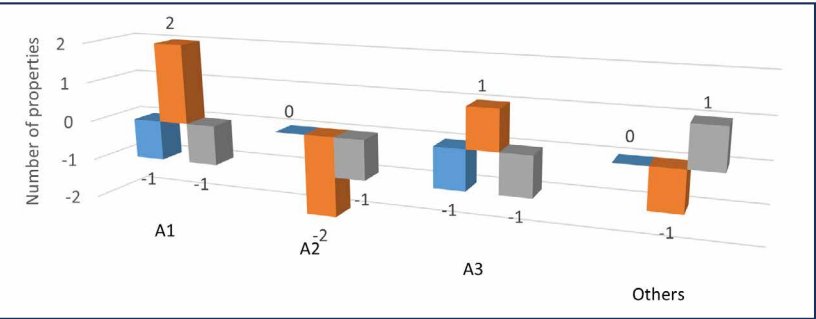
Llanelli In Use Retail Activity Comparision between September 2022 and March 2023

	Combined Sept 2022	Combined March 2023	Primary Sept 2022	Primary March 2023	Secondary Sept 2022	Secondary March 2023	Town Centre Retail Study (excluding primary and secondary) Sept 2022	Town Centre Retail Study (excluding primary and secondary) March 2023
A1	122	122	48	47	47	49	27	26
A2	39	36	7	7	8	6	24	23
A3	51	50	4	3	12	13	35	34
Others	82	82	2	2	10	9	70	71

Llanelli Retail Activity Comparision between September 2022 and March 2023

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

Llanelli net gain/loss of in Use Retail Space between September 2022 and March 2023





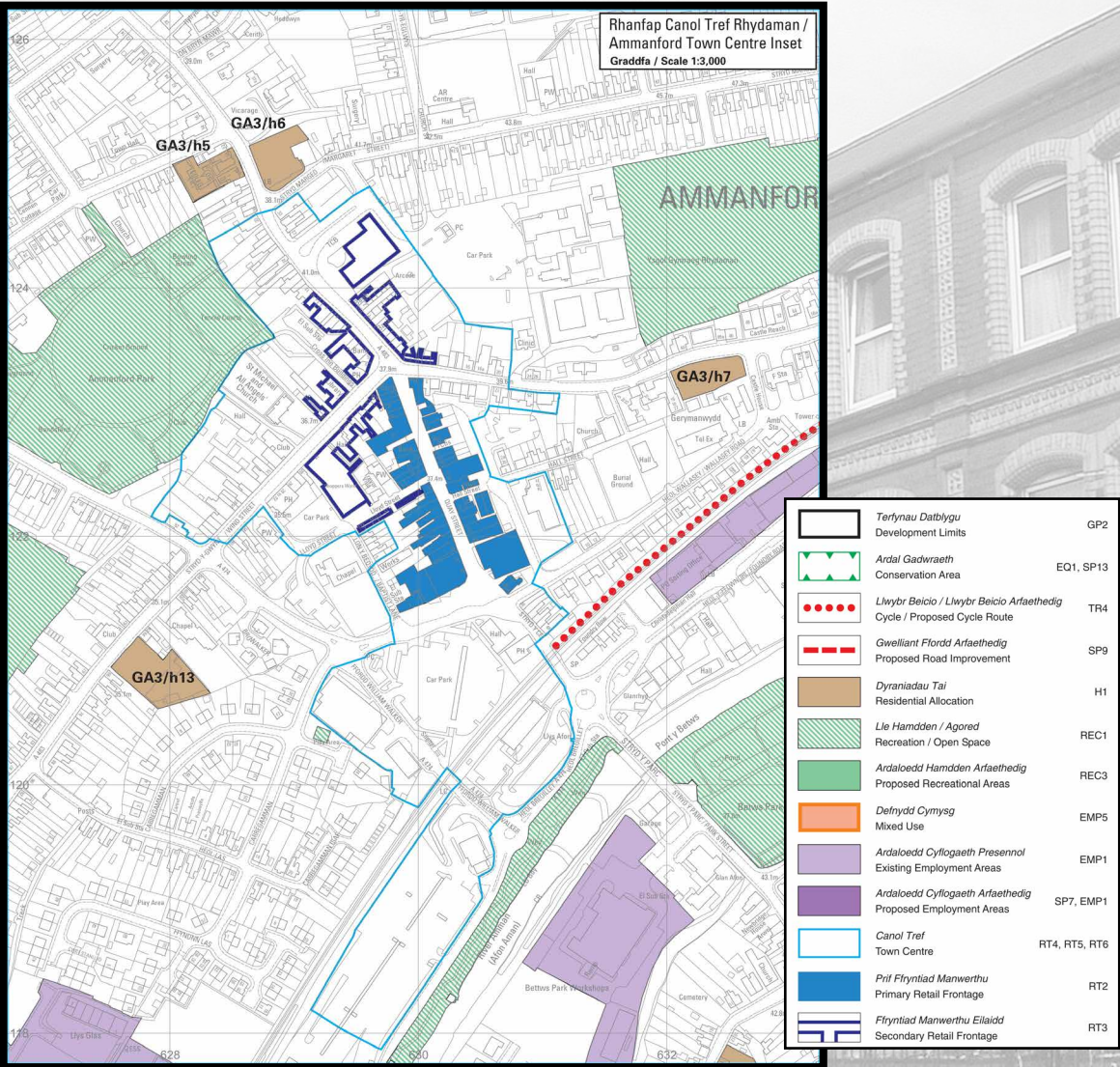
# Ammanford

## 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.



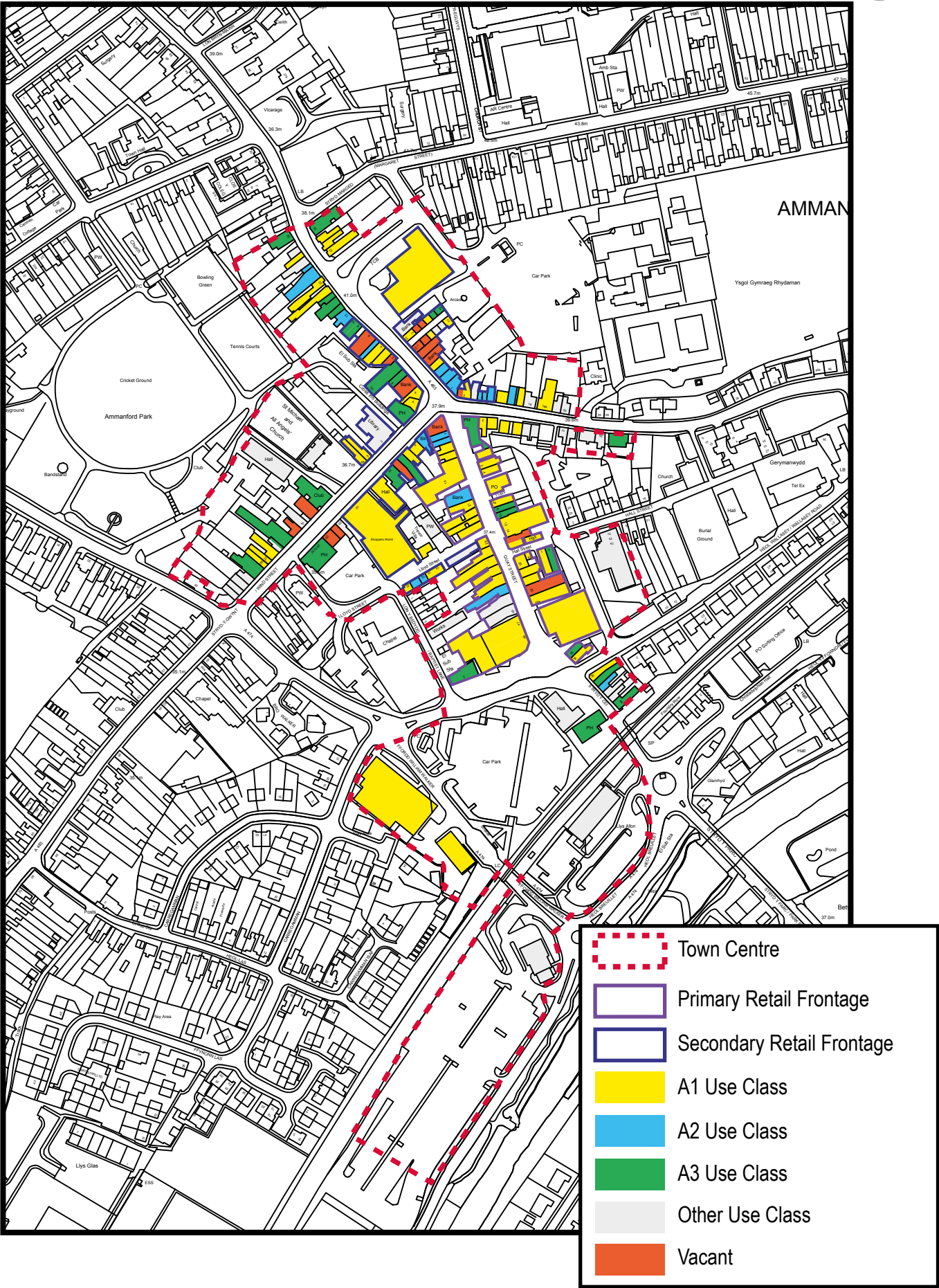
## Ammanford Town Centre (GA3): Adopted LDP - Extract





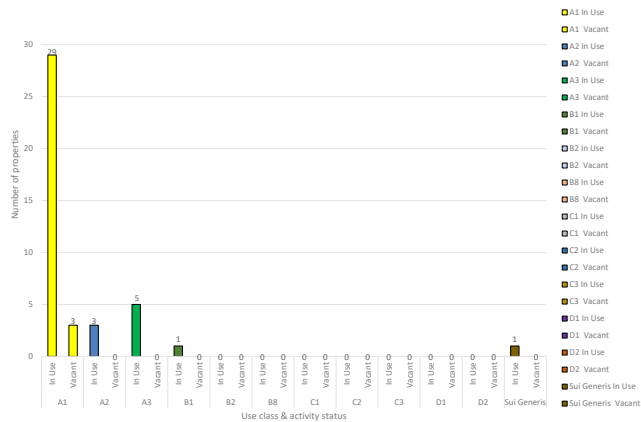


# Ammanford - Activity by Use Class (including Vacant Units)

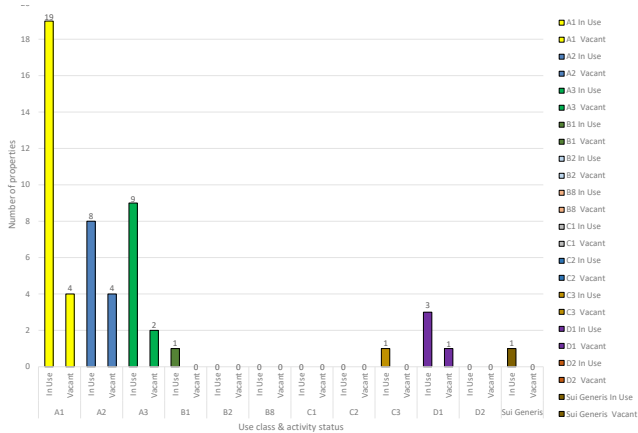


Ammanford - Activity by Use Class (including Vacant Units)

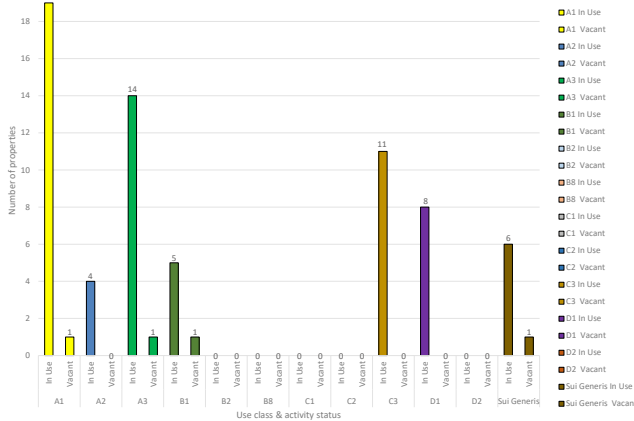
Ammanford Primary Retail Frontage



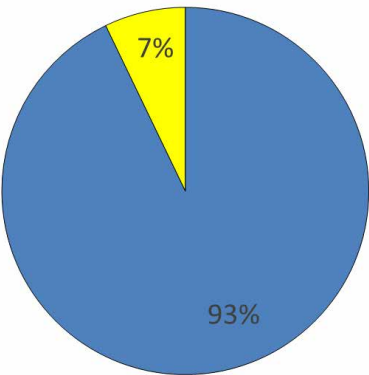
Ammanford Secondary Retail Frontage



Ammanford Town Centre  
(Excluding Primary & Secondary Retail Frontage)

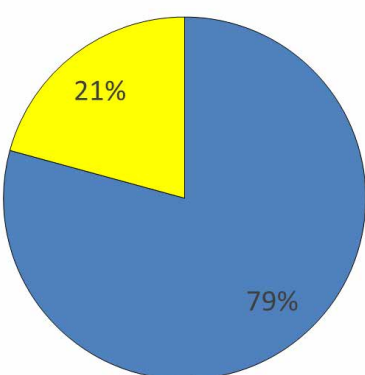


Ammanford Primary Retail Frontage  
Vacancy Rates



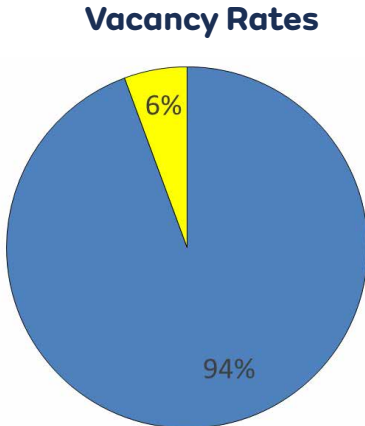
■ In use total ■ Vacant total

Ammanford Secondary Retail Frontage  
Vacancy Rates



■ In use total ■ Vacant total

Ammanford Town Centre  
(Excluding Primary & Secondary Retail Frontage)  
Vacancy Rates



■ In use total ■ Vacant total

## Ammanford - Activity by Use Class (including Vacant Units)

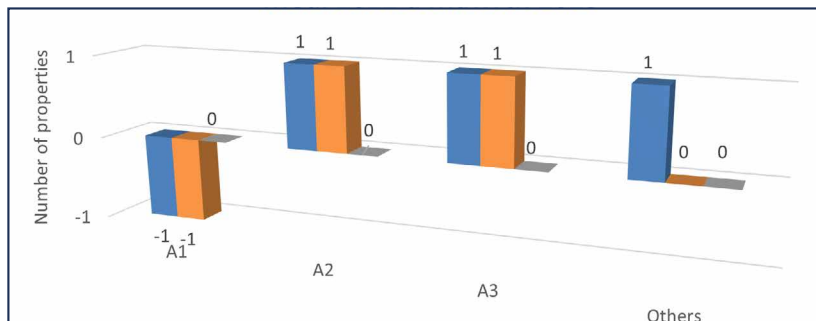
### Ammanford In Use Retail Activity Comparision between September 2022 and March 2023

	Combined Sept 2022	Combined March 2023	Primary Sept 2022	Primary March 2023	Secondary Sept 2022	Secondary March 2023	Town Centre Retail Study (excluding primary and secondary) Sept 2022	Town Centre Retail Study (excluding primary and secondary) March 2023
A1	68	67	27	29	20	19	19	19
A2	14	15	3	3	7	8	4	4
A3	27	28	5	5	8	9	14	14
Others	37	38	2	2	6	6	30	30

### Ammanford Retail Activity Comparision between September 2022 and March 2023

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

### Ammanford net gain/loss of in Use Retail Space between September 2022 and March 2023





## 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.



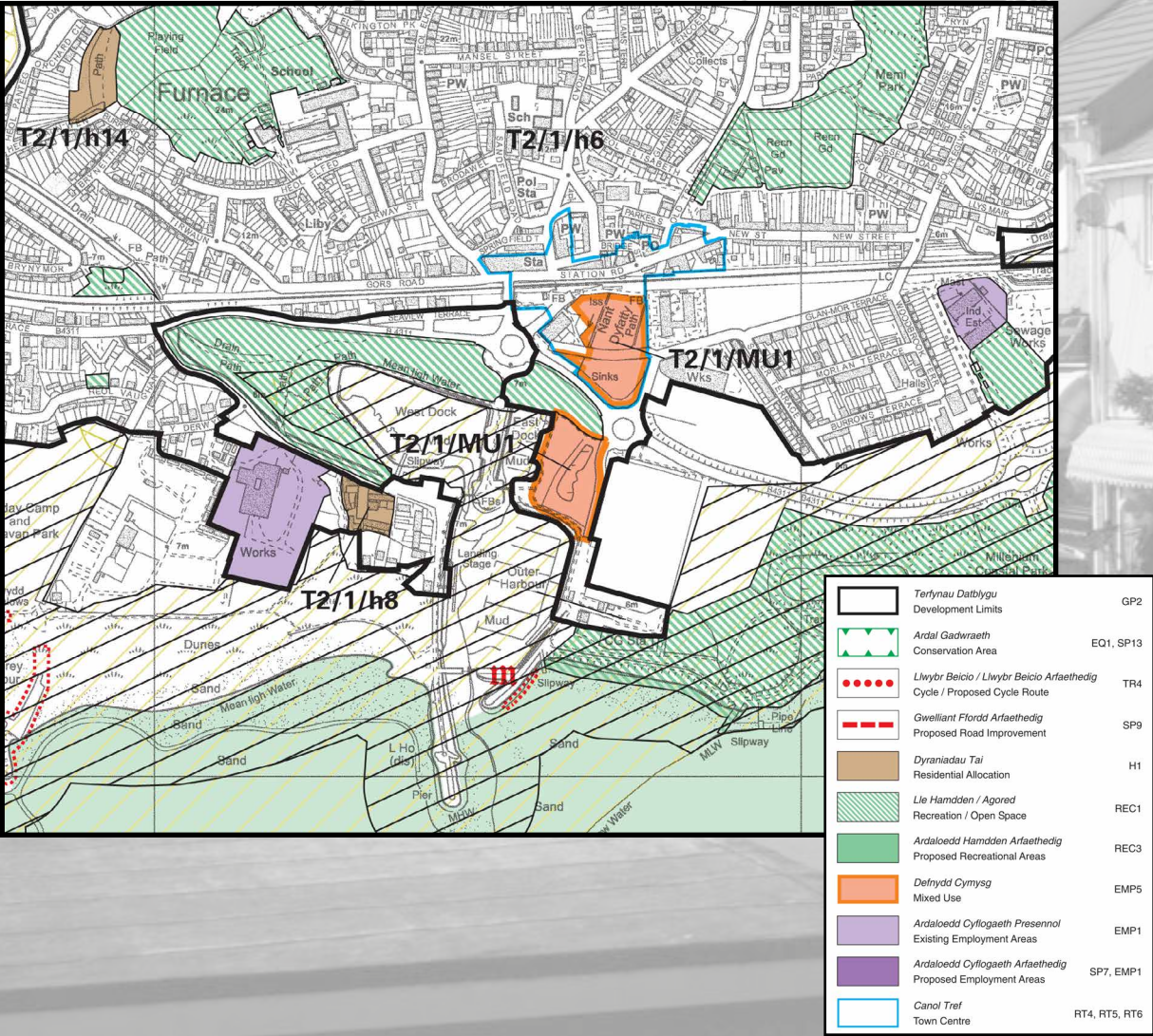
# Burry Port (Service Centre)

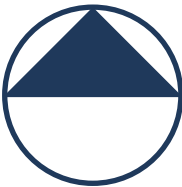
## Background

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.

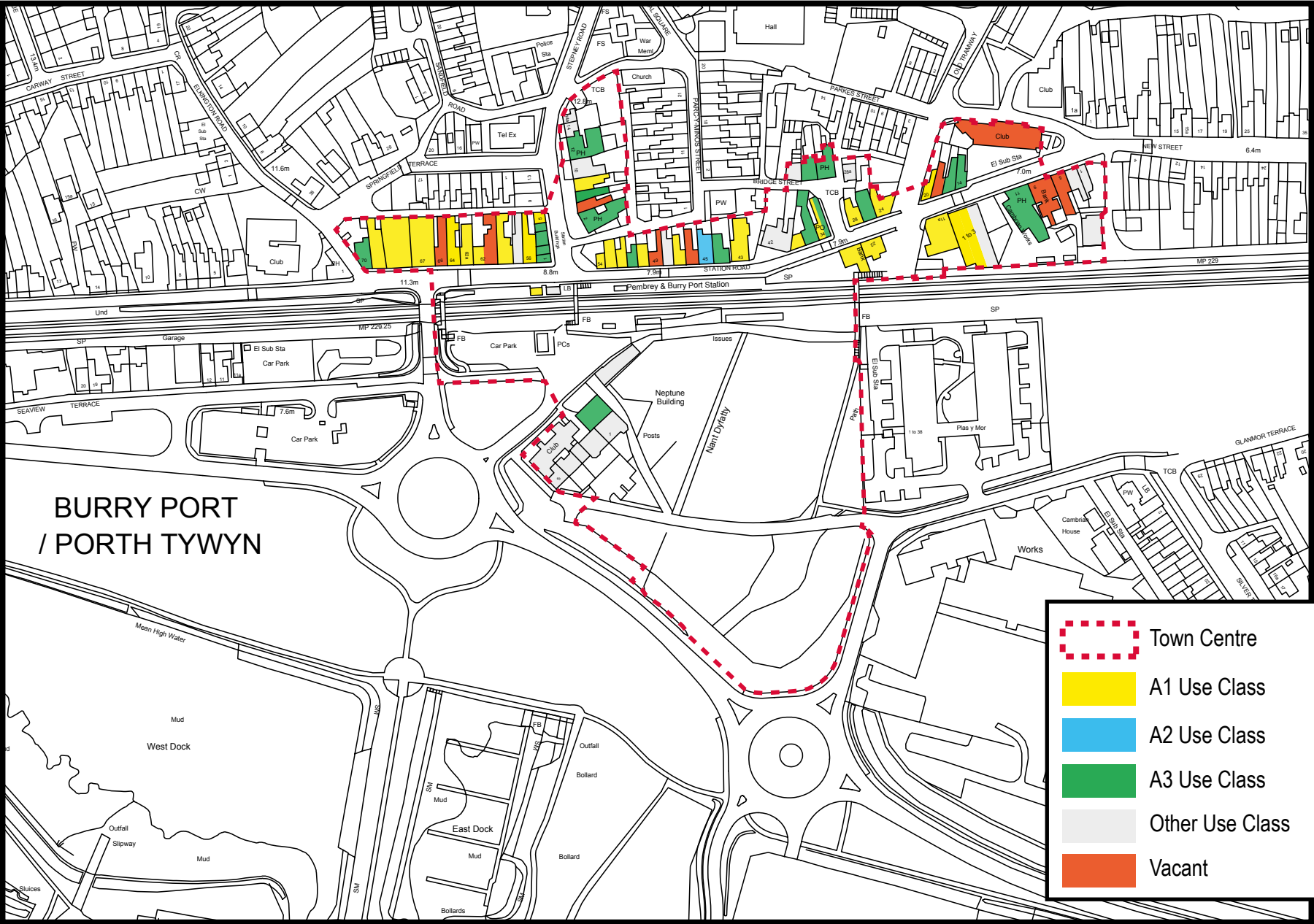


Burry Port (T2/1): Adopted LDP - Extract





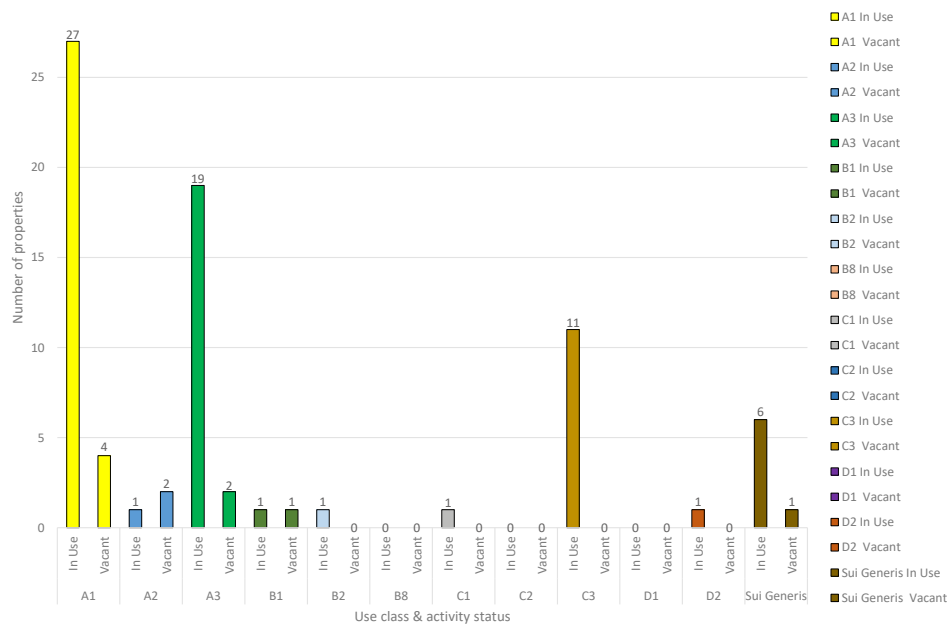
Burry Port - Activity by Use Class (including Vacant Units)





# Burry Port (Service Centre)

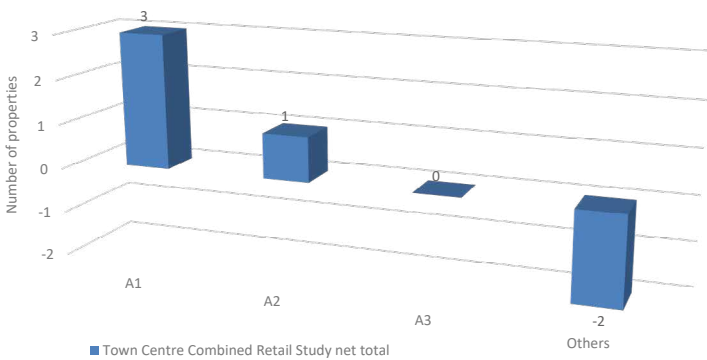
## Burry Port Retail Activity by Use Class (including Vacant Units)



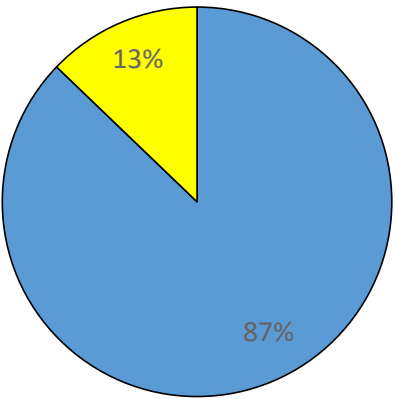
## Burry Port In Use Retail Activity Comparison between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	24	27
A2	0	1
A3	19	19
Others	23	21

## Burry Port net gain/loss of In Use between March 2022 and March 2023



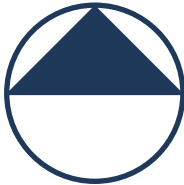
## Burry Port Retail Vacancy Rates



■ In use total ■ Vacant total





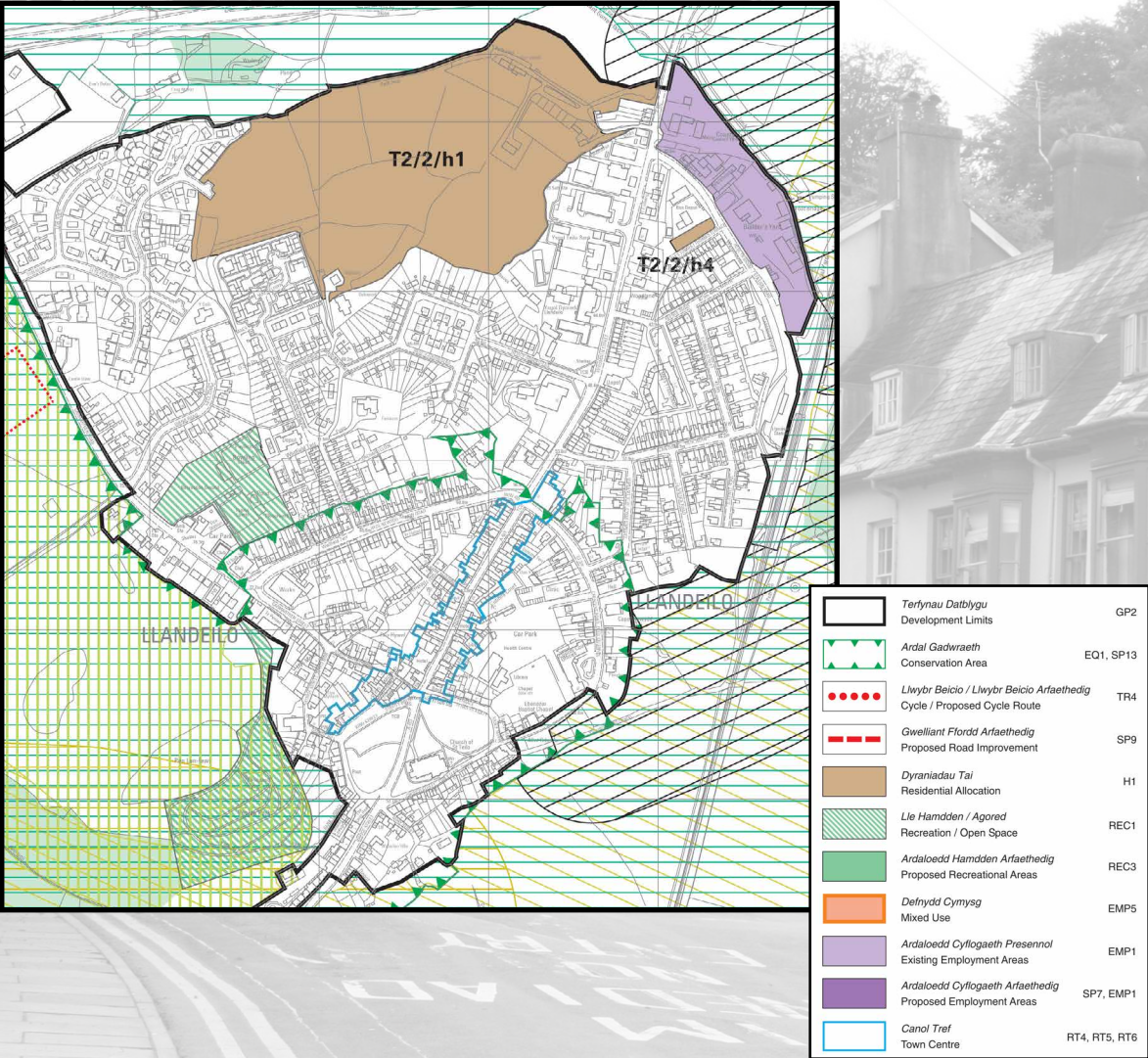


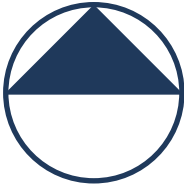
# Llandeilo (Service Centre)

## Background

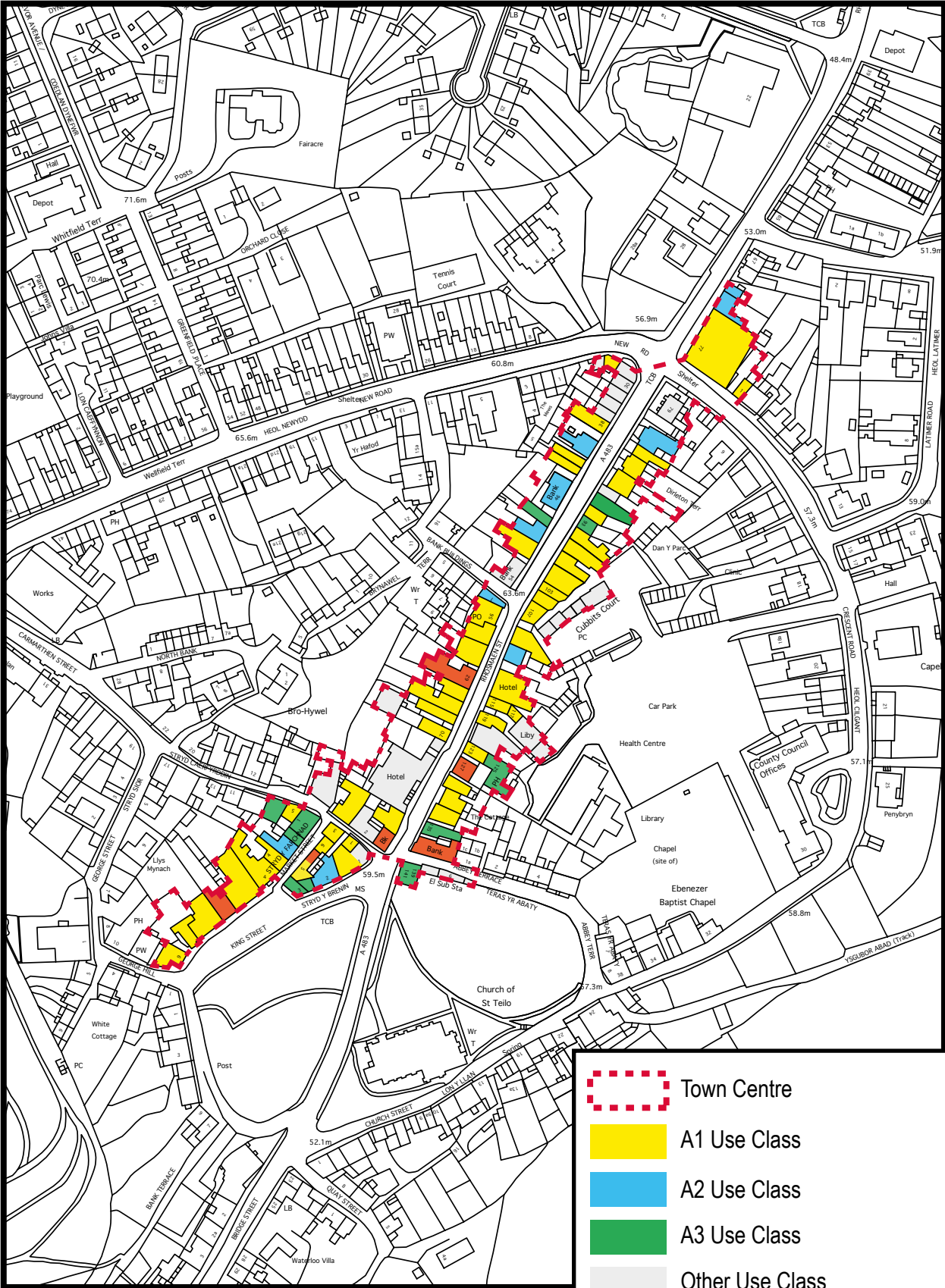
Llandeilo has an established retail centre reflective of its market town status and serves a broader hinterland. The retail offer makes provision for local requirements whilst also developing a reputation for quality provision serving niche retail markets. In this respect the settlement has been successful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

Llandeilo (T2/2): Adopted LDP - Extract





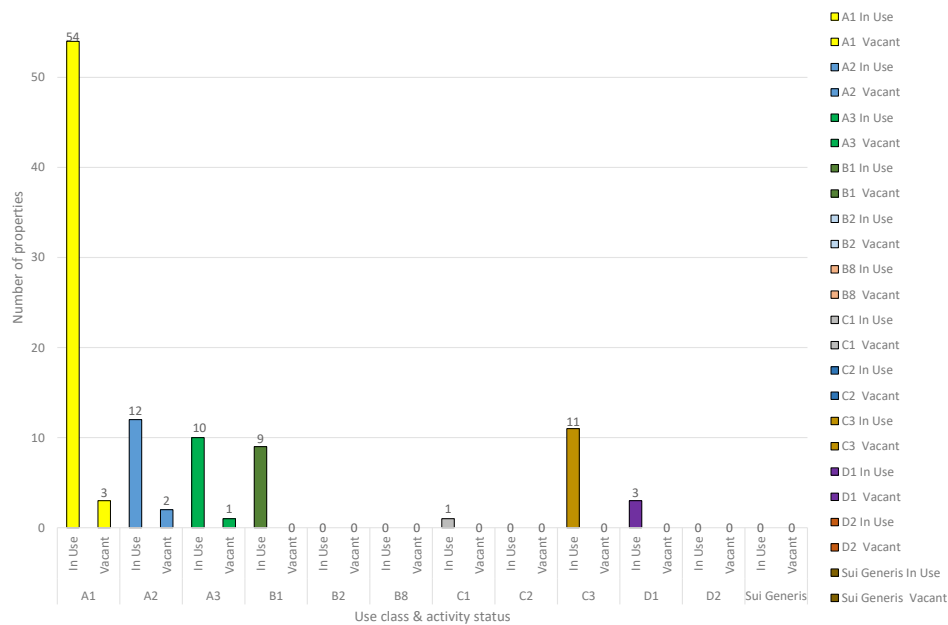
Llandeilo - Activity by Use Class (including Vacant Units)





# Llandeilo (Service Centre)

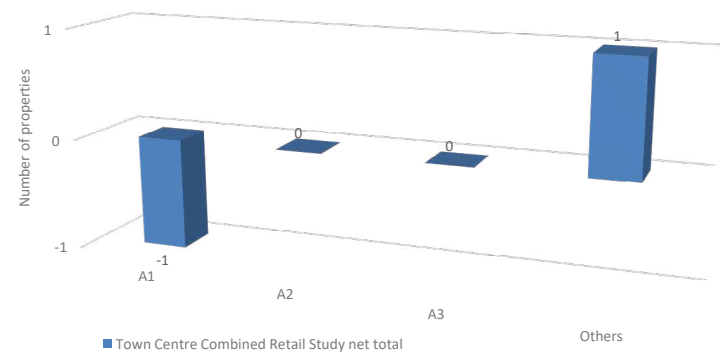
## Llandeilo Retail Activity by Use Class (including Vacant Units)



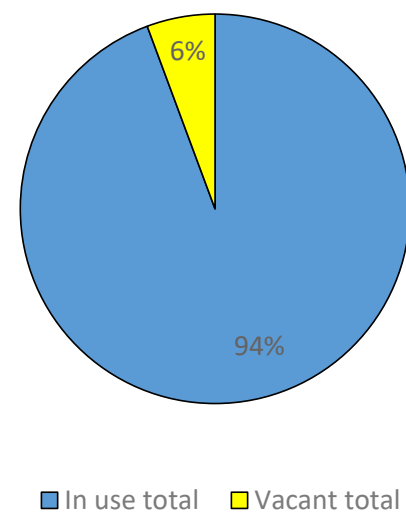
## Llandeilo In Use Retail Activity Comparision between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	55	54
A2	12	12
A3	10	10
Others	23	24

## Llandeilo net gain/loss of In Use between March 2022 and March 2023



## Llandeilo Retail Vacancy Rates





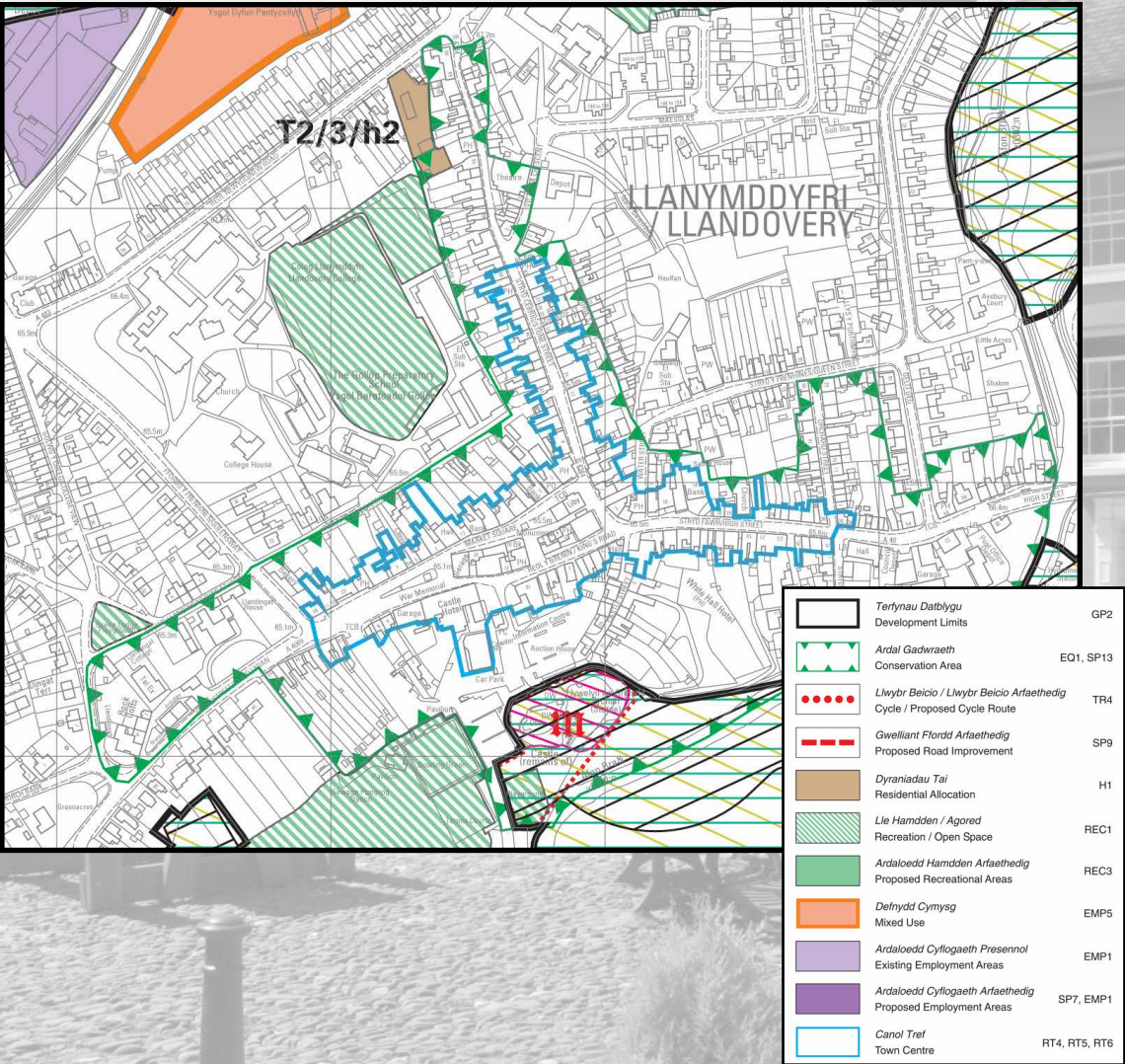
# Llandovery (Service Centre)

## 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



Town Centre

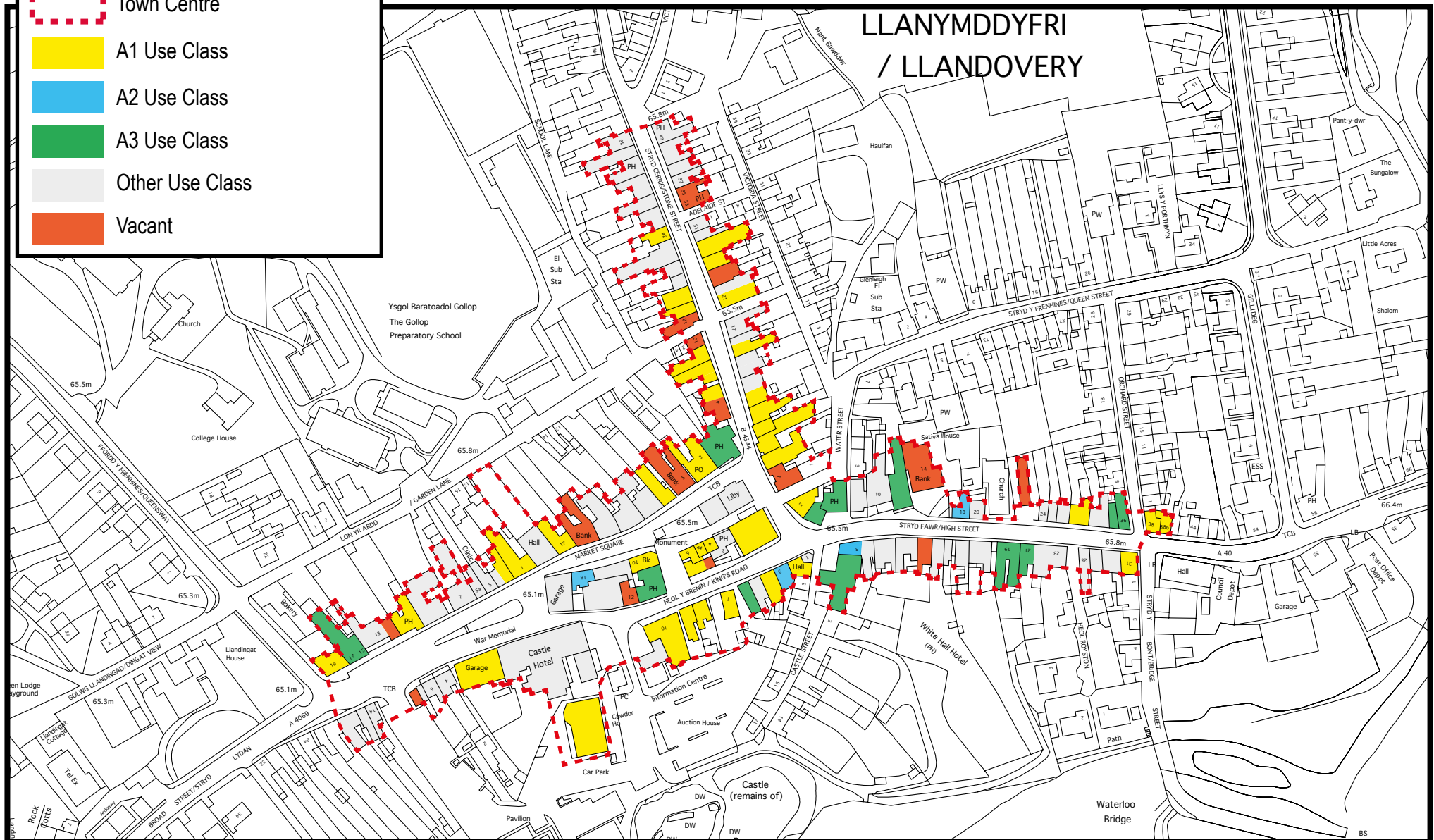
A1 Use Class

A2 Use Class

A3 Use Class

Other Use Class

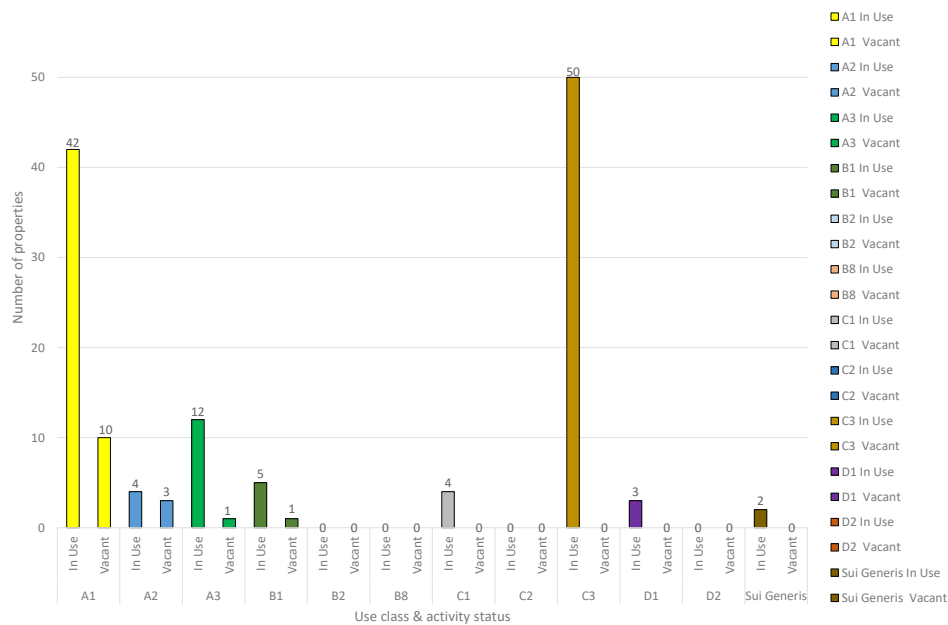
Vacant





# Llandovery (Service Centre)

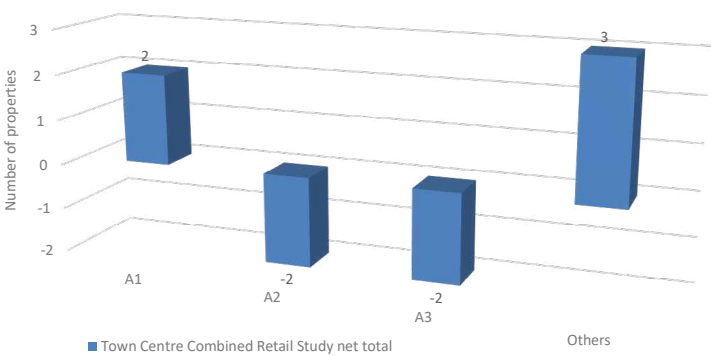
## Llandovery Retail Activity by Use Class (including Vacant Units)



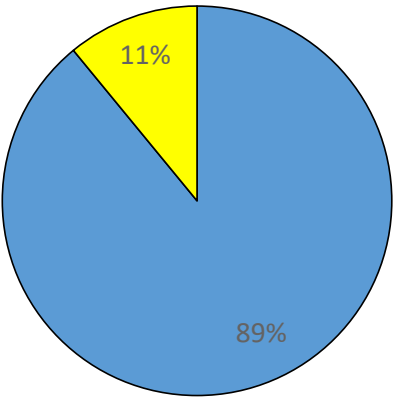
## Llandovery In Use Retail Activity Comparison between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	40	42
A2	6	4
A3	14	12
Others	61	64

## Llandovery net gain/loss of In Use between March 2022 and March 2023



## Llandovery Retail Vacancy Rates



■ In use total ■ Vacant total



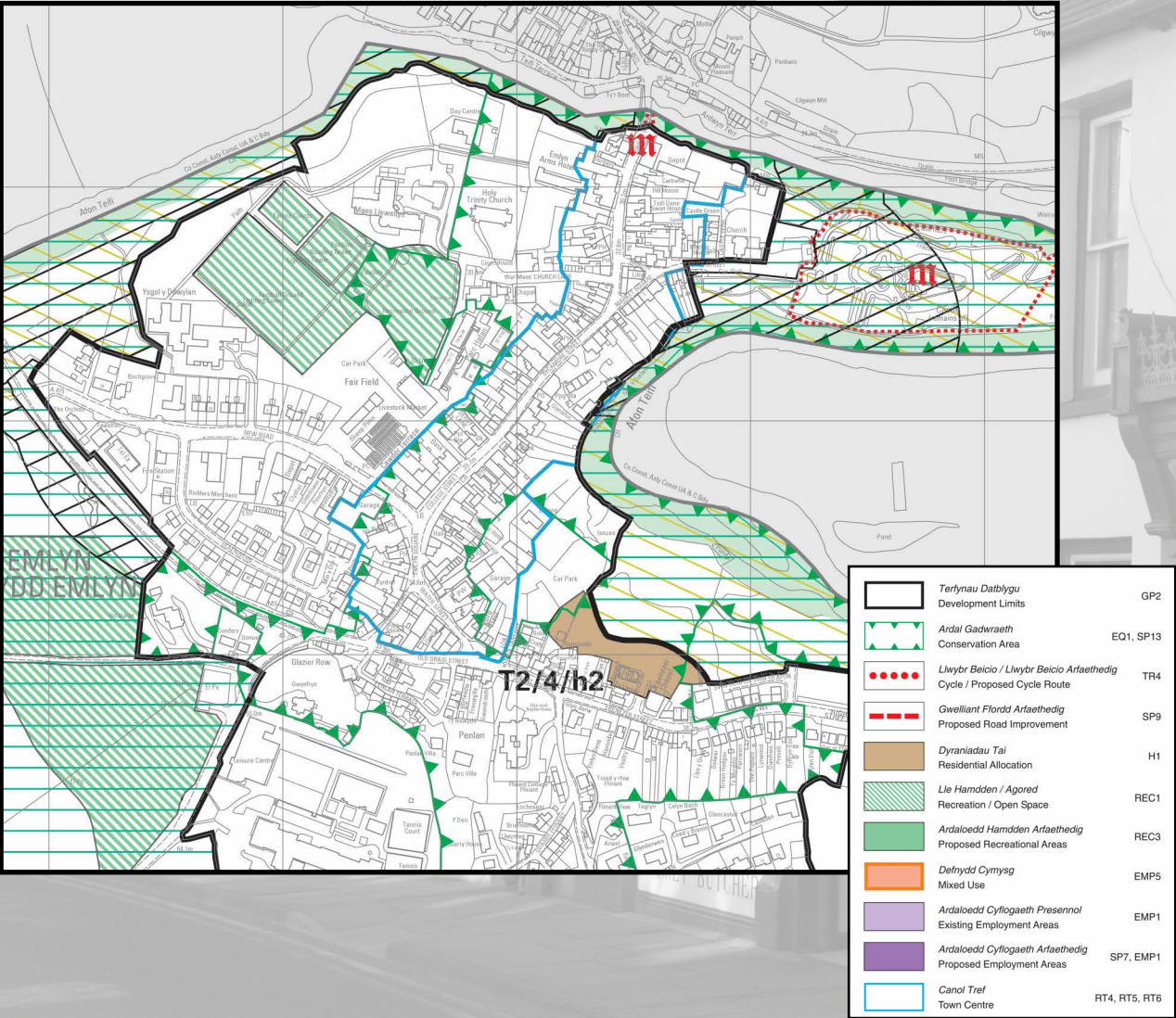


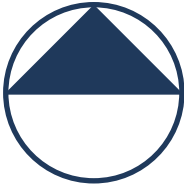
# Newcastle Emlyn (Service Centre)

## Background

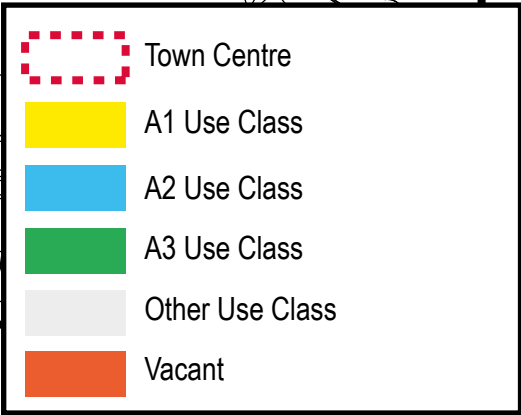
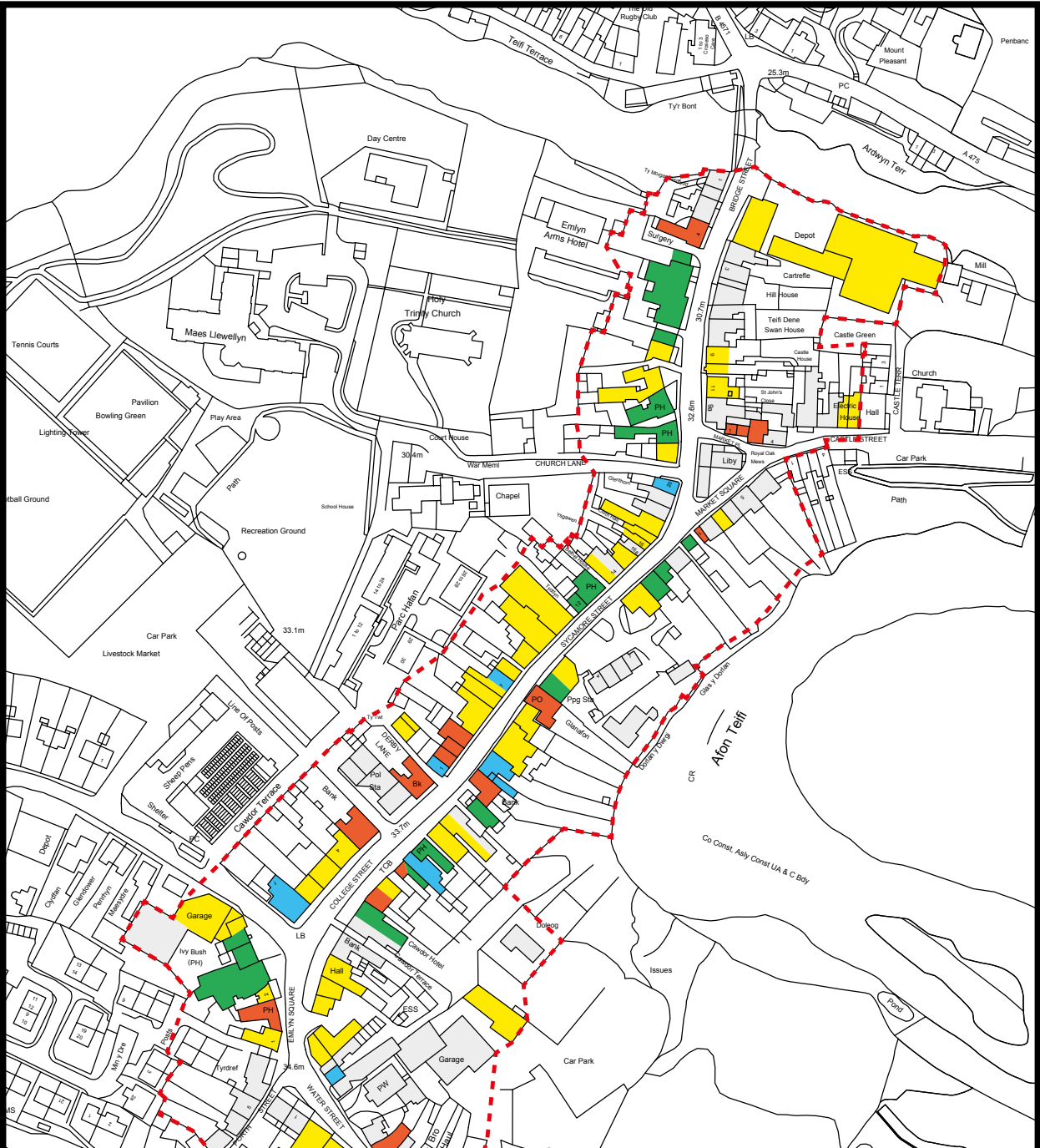
Serving a wider area Newcastle Emlyn represents an important rural market town with an established town centre. In retail terms the settlement is served by a mix of comparison and convenience provision with the town centre predominantly independent and local retailers with some national representation.

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



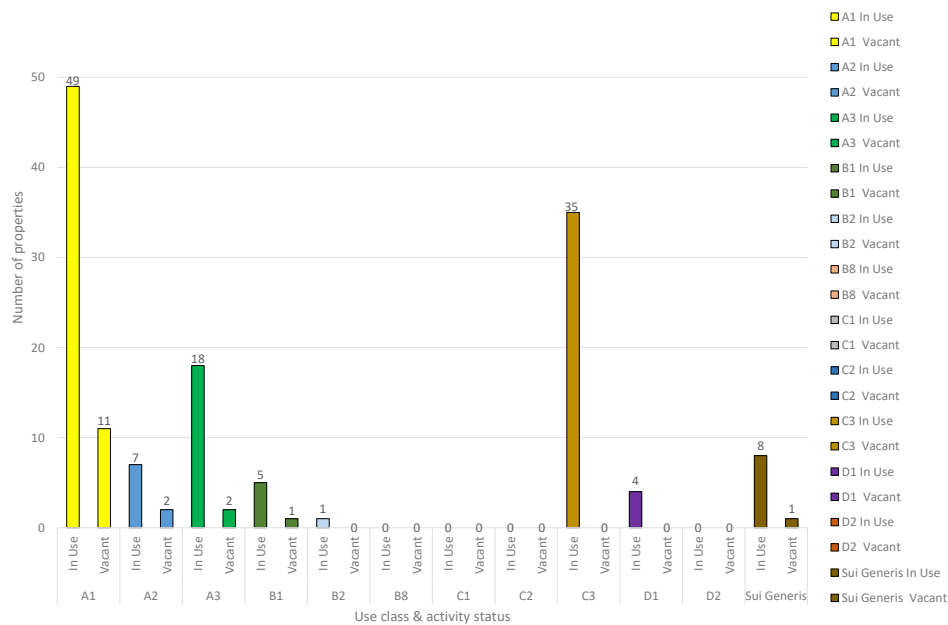


# Newcastle Emlyn - Activity by Use Class (including Vacant Units)



# Newcastle Emlyn (Service Centre)

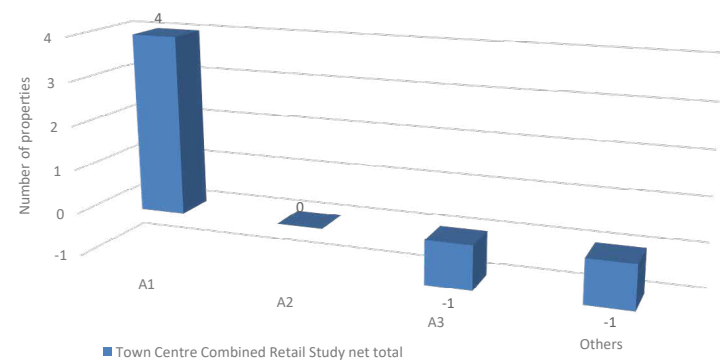
## Newcastle Emlyn Retail Activity by Use Class (including Vacant Units)



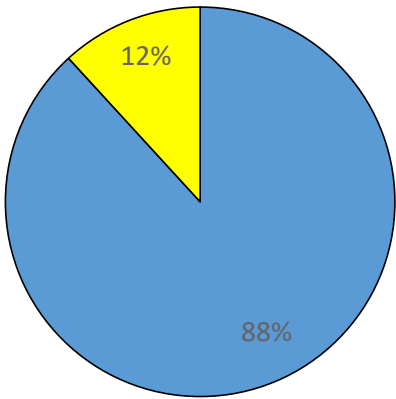
## Newcastle Emlyn In Use Retail Activity Comparision between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	45	49
A2	7	7
A3	19	18
Others	54	53

## Newcastle Emlyn net gain/loss of In Use between March 2022 and March 2023



## Newcastle Emlyn Retail Vacancy Rates



In use total Vacant total



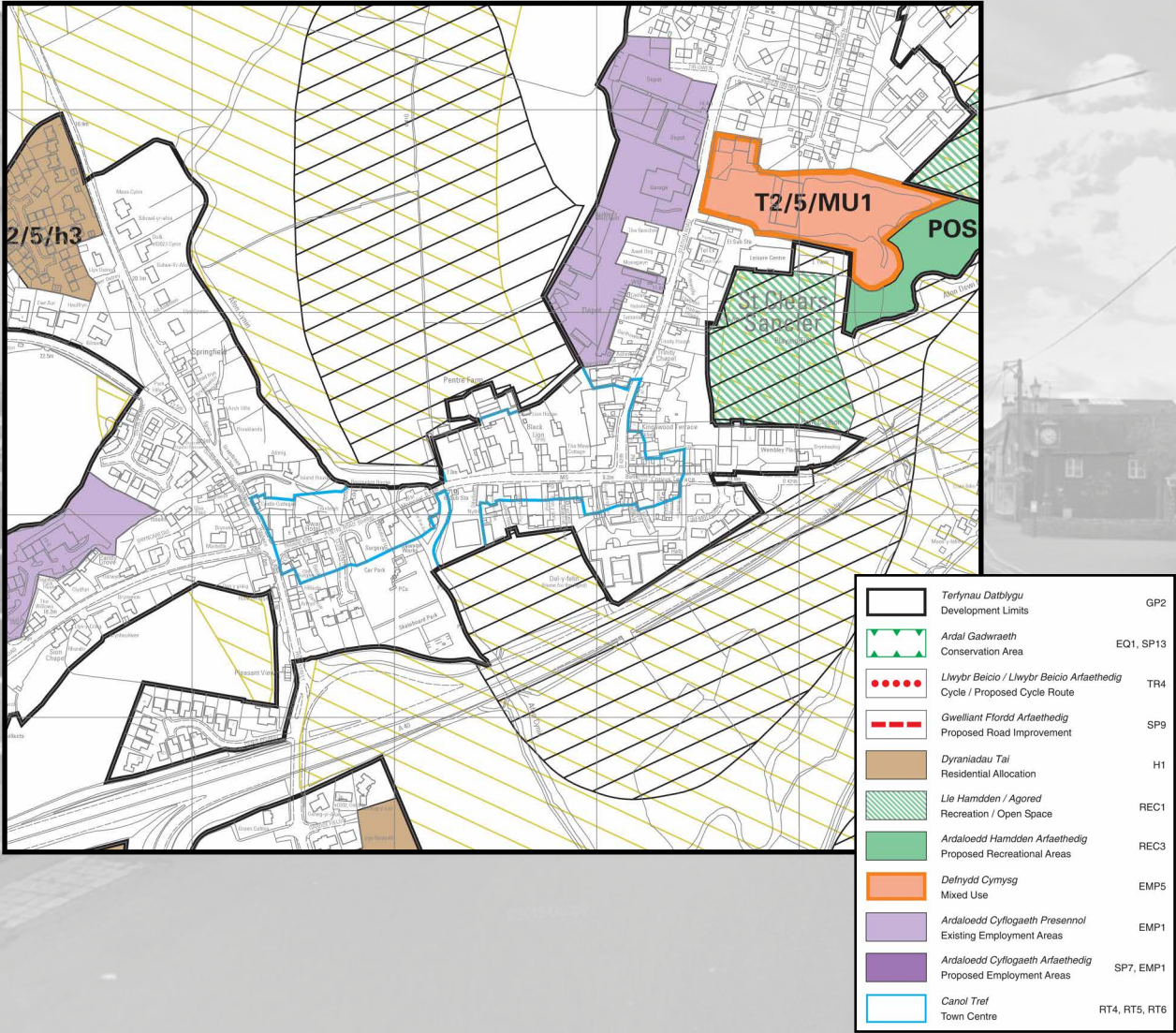


# St. Clears (Service Centre)

## Background

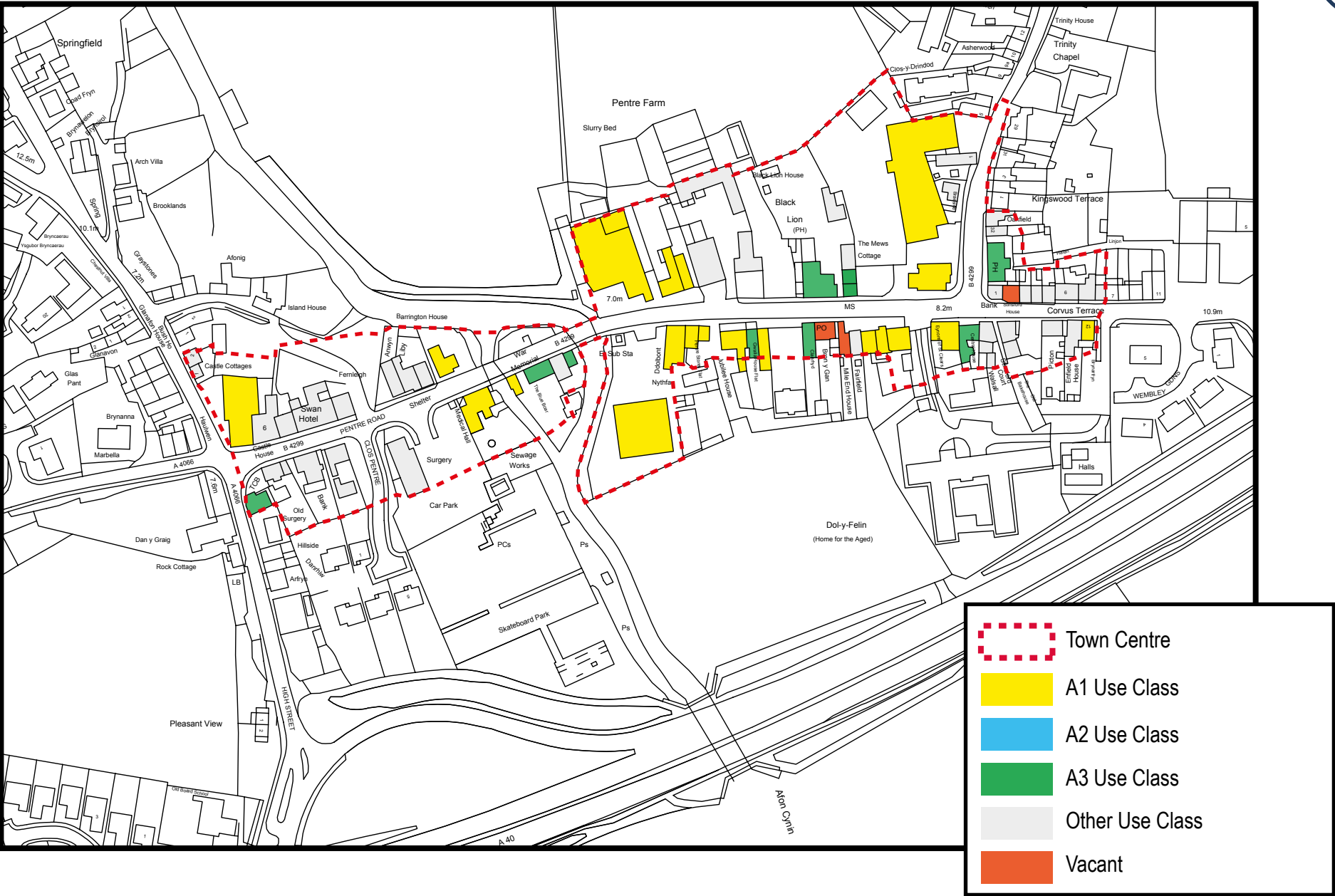
The retail offer within St. Clears is predominantly focused within the town centre boundary and broadly on meeting local provision. Incorporating a mix of convenience and comparison retailers there is limited national high street representation.

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



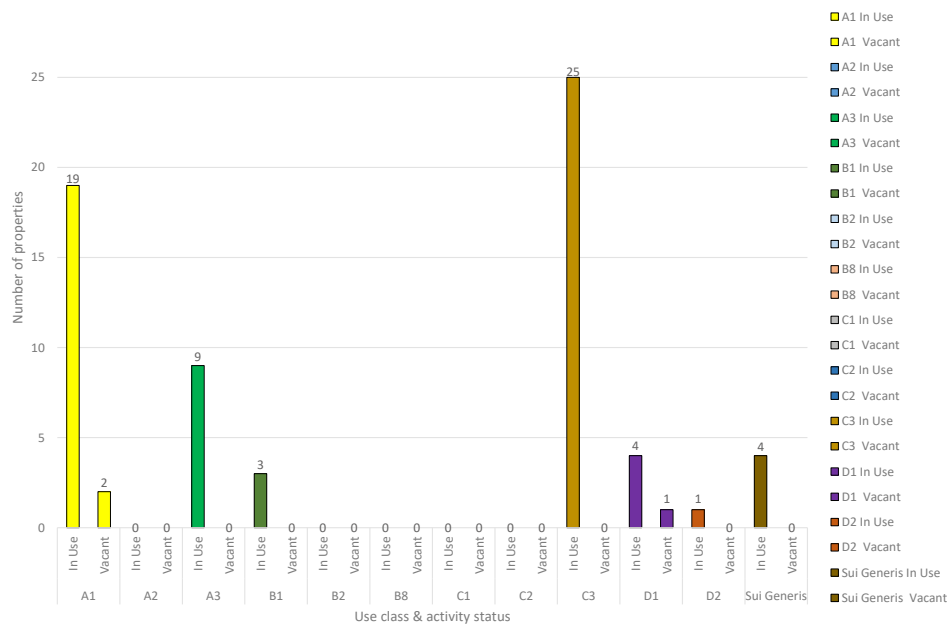


St. Clears - Activity by Use Class (including Vacant Units)

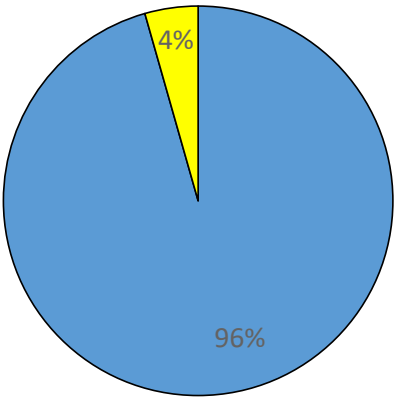


# St. Clears (Service Centre)

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



## St. Clears Retail Vacancy Rates

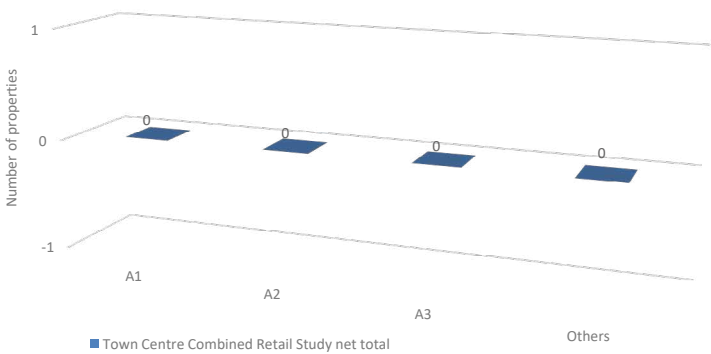


■ In use total ■ Vacant total

## St. Clears In Use Retail Activity Comparison between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	19	19
A2	0	0
A3	9	9
Others	37	37

## St. Clears net gain/loss of In Use between March 2022 and March 2023



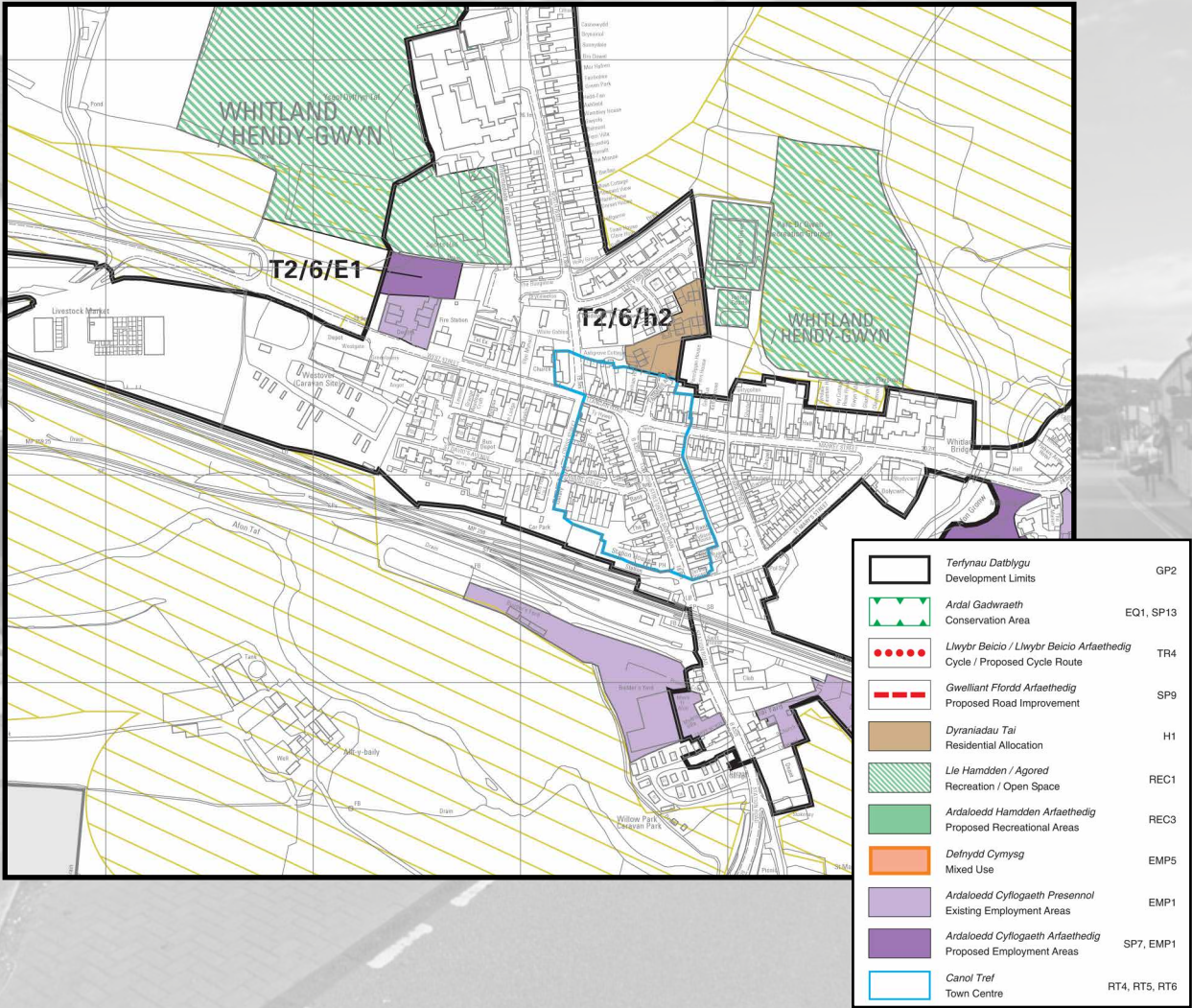


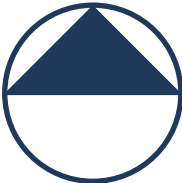
# Whitland (Service Centre)

## Background

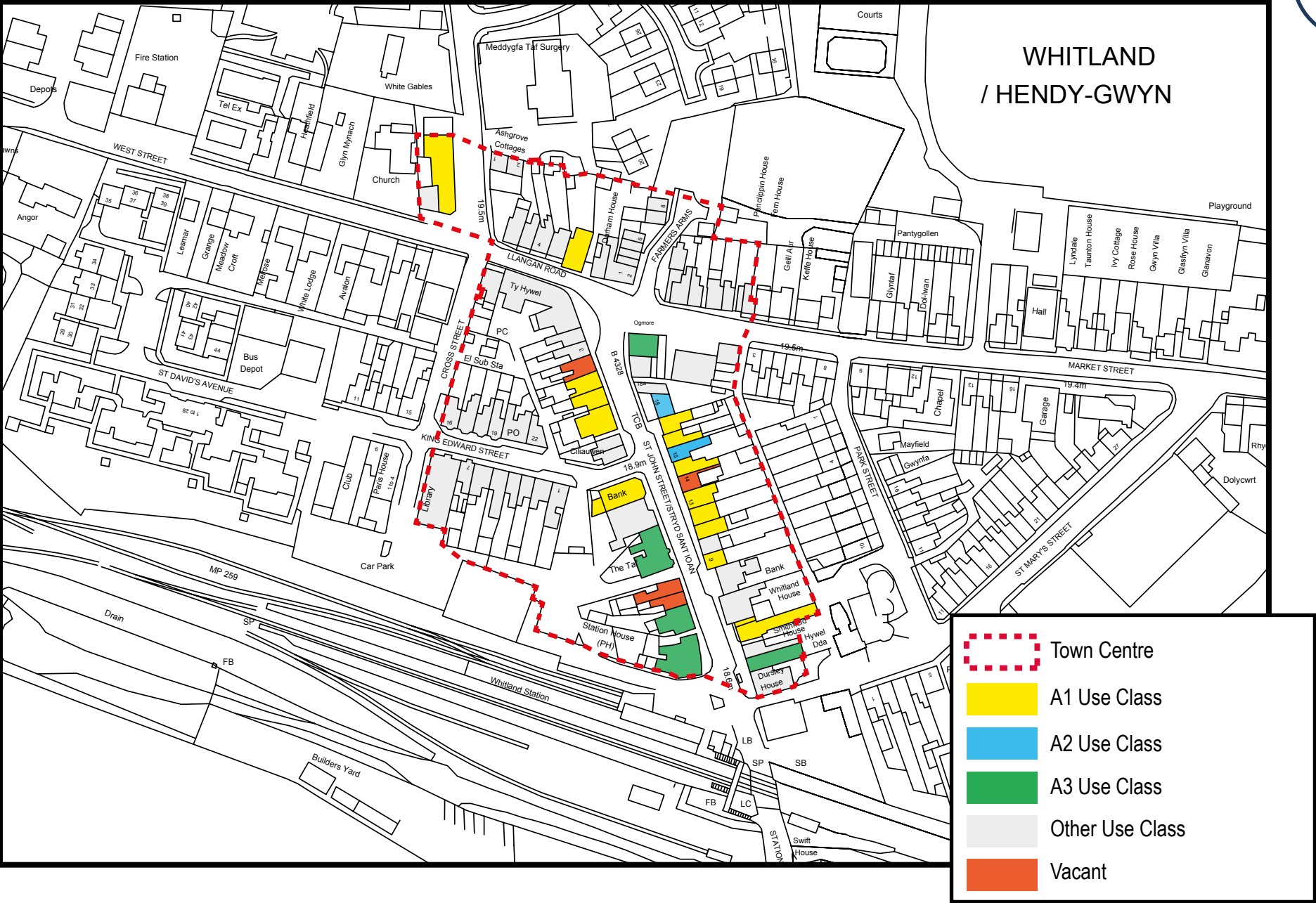
Focused predominately on St. John's Street, Whitland, as with other Service Centre settlements, provides an important retail offer serving the local and wider community. In retail terms the settlement is served by a mix of provision with the town centre predominantly consisting of independent and local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

Whitland (T2/6): Adopted LDP - Extract



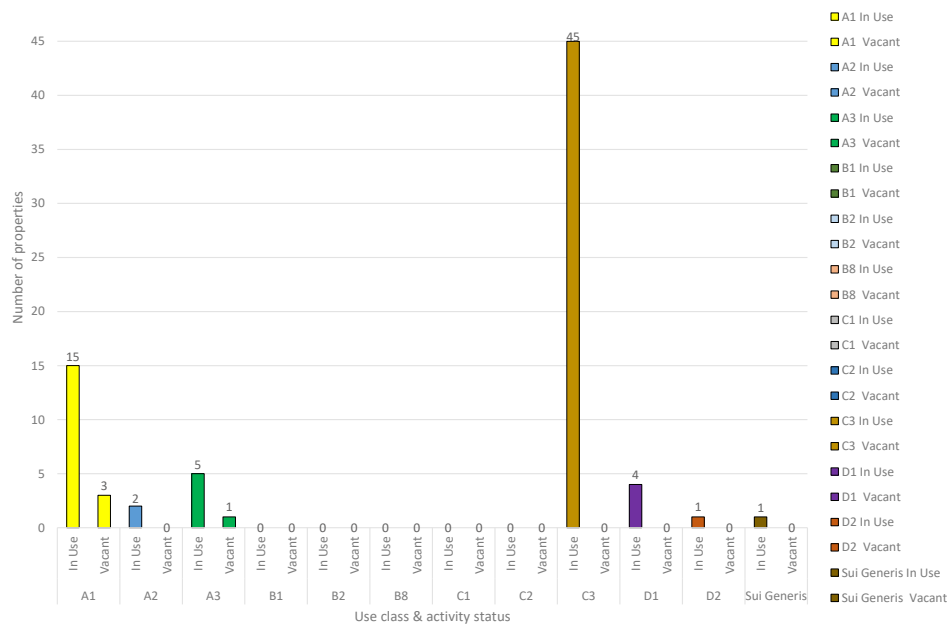


Whitland - Activity by Use Class (including Vacant Units)

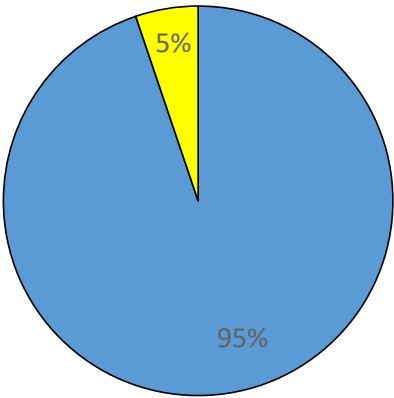


# Whitland (Service Centre)

## Whitland Retail Activity by Use Class (including Vacant Units)



## Whitland Retail Vacancy Rates



■ In use total ■ Vacant total

## Whitland In Use Retail Activity Comparison between March 2022 and March 2023

	Town Centre Combined Retail Study March 2022	Town Centre Combined Retail Study March 2023
A1	15	15
A2	2	2
A3	6	5
Others	51	51

## Whitland net gain/loss of In Use between March 2022 and March 2023

