

Economic Development Needs Study

Warrington Borough Council



Final Report

October 2016

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EXECUTIVE SUMMARY

Introduction

- i) This report provides an economic development (employment land) needs study for Warrington Borough. It has been carried out to provide a robust evidence base which will inform the emerging Local Plan. It will review the economic performance of the Borough and inform decisions on current and future land allocations. It has the aims to:
- *“Identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and*
 - *Provide an overview of the current profile of Warrington’s existing employment supply and an analysis of any gaps in the current land supply in terms of quality and location.”*
- ii) In addition to this study, a further piece of work has been undertaken by Mickledore and forms part of the Council’s evidence base, looking at alternative economic forecasts in more detail.

Methodology

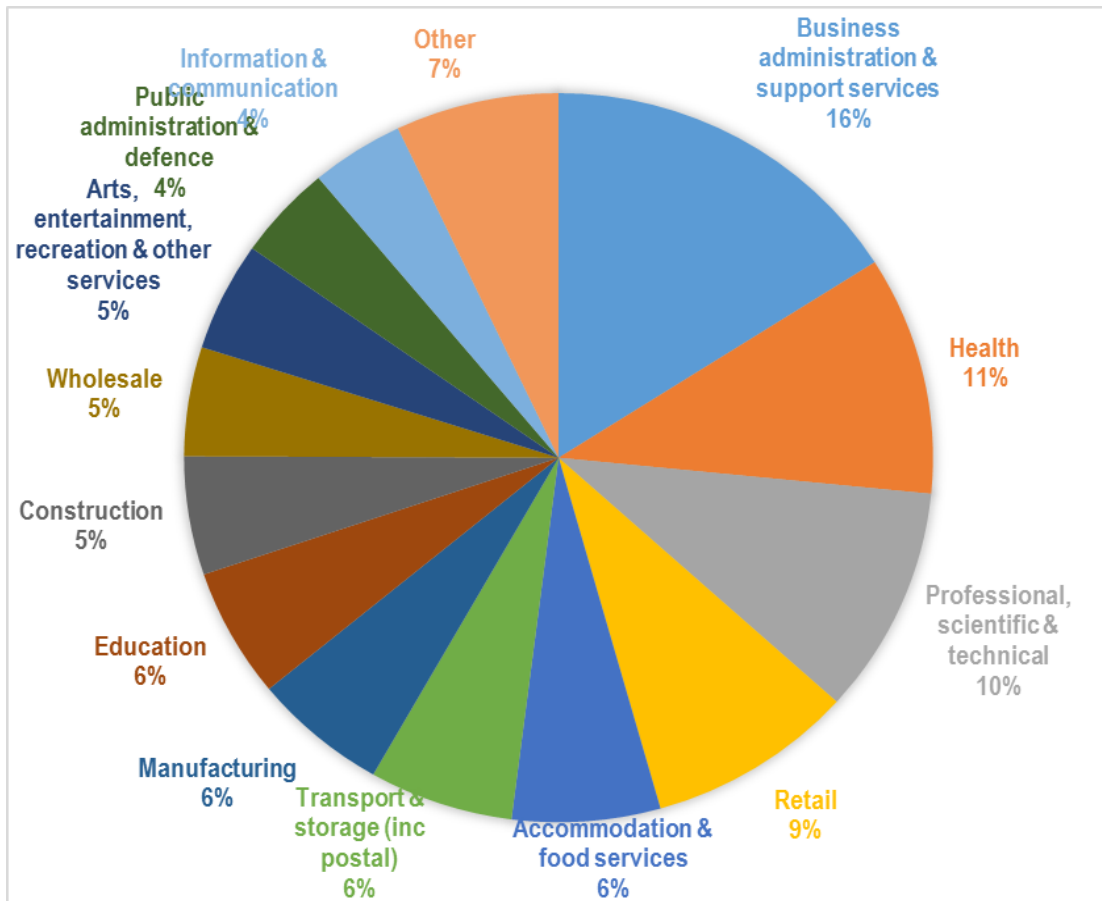
- iii) Several research methods have been used, including site visits and interviews with property market stakeholders such as developers, investors and their agents. Major developers and landowners have been individually consulted, as have the key public sector agencies. Sources of ongoing business engagement, overseen by Mickledore, have been utilised. The Functional Economic Market Area (FEMA) of Warrington has been identified and the property market in the local authority areas within that FEMA has been reviewed through desktop analysis of employment and planning strategies, and consultations with officers from those local authorities. Finally, the land supply has been assessed against forecast data to understand future land need. The methodology follows Planning Practice Guidance on employment land reviews.

Findings

- iv) Warrington has a skilled, growing and economically active population, with a low unemployment rate. In 2014, BRES data indicated that there were some 122,100 in employment in Warrington. As figure ES1 shows, unlike many other local authorities in England, the largest employment sector is not health, education or retail but

business administration with 16 percent of the total. This sector gained some 6,000 jobs locally over 2009-2014. Professional, scientific and technical is another strong sector and combined with information and communication these office-based sectors account for 30 percent of employment.

Figure ES1 – BRES Employment Breakdown, Percent



Source: BRES, 2014

- v) Public sector employment – health, education, administration and defence – accounts for 21 percent of local employment, with health employment dominating. Manufacturing accounts for 6 percent of employment and it is important to note that equal employment value comes from transport and storage uses, with another 5 percent of employment in related wholesale activities, In GVA terms Warrington generates the largest proportion of its economy from distribution, transport, accommodation and food (20 percent).
- vi) In Section 3.0 of the Main Report Location Quotients (LQs) are used to consider how sectoral employment in Warrington differs from the English average. A LQ of one indicates that the proportion of employment is the same as the English average and

a LQ of two shows a proportion double the national average.

- vii) Table ES1 shows the LQs of the major employment sectors along with the percentage growth of those sectors since 2009-2014. Again, business administration and support services emerges as a clear strength with an LQ of 1.8 and 45 percent recent growth. Utilities has also seen extensive recent growth to a position well above national average, albeit at a much smaller overall scale of employment.

Table ES1 – Major Sectors Location Quotients and growth 2009-2014

	LQ	Growth, percent	Employment
Mining, quarrying and utilities	1.8	106.0	2,400
Manufacturing	0.7	-7.9	7,100
Construction	1.2	-19.9	6,400
Motor trades	1.3	33.4	2,900
Wholesale	1.2	1.0	6,000
Retail	0.9	-3.1	11,000
Transport and storage	1.4	13.0	7,600
Accommodation and food services	0.9	14.1	7,800
Information and communication	0.9	-14.5	4,900
Financial and insurance	0.4	-13.2	2,000
Property	0.6	-57.4	1,300
Professional, scientific and technical	1.2	19.0	12,300
Business administration and support services	1.8	44.9	19,600
Public administration and defence	1.0	-13.1	5,100
Education	0.6	-6.3	7,000
Health	0.8	12.8	13,000
Arts, entertainment, recreation and other services	1.1	24.2	6,000
Total			122,400

Source: BRES, 2014

- viii) By comparison, local employment in financial and insurance, and to a lesser degree property, is well below average. Employment in property services has also declined significantly since 2009. Finally, it is worth noting that Warrington does not have a strong dependence on the public sector. The LQs of health, education, administration and defence are at or below 1.0. Local employment in health and education has also declined since 2009.

- ix) The success of Omega over the last three years has been a key feature of the local economy. With a realistic supply of 69.68 ha now remaining at Omega, stakeholders are now considering further strategic scale sites in the Borough, particularly in South Warrington with access to the M56.
- x) Local industrial need is for industrial units starting at 100 sqm and extending up to 1,000 sqm. Larger businesses are looking for industrial and warehouse units of 2,000-5,000 sqm. Demand, relative to supply, is felt to be particularly strong at Woolston Grange, and around Birchwood, although most of the main Employment Areas are performing well. There is also a lack of freehold options locally.
- xi) Local office demand is primarily for suites of 0-500 sqm, in Birchwood and Warrington Town Centre. Larger requirements can extend to 2,000 sqm and tend to be focused at Birchwood only. There is limited Town Centre stock, relative to demand, while Birchwood lacks 1,000-2,000 sqm properties, particularly freehold options.
- xii) The defined FEMA for Warrington includes its immediate neighbours of Wigan, Trafford and Salford in Greater Manchester; Cheshire West and Chester, Cheshire East and particularly Halton and St Helens in the Liverpool City Region. Warrington also has good links with the nearby urban centres of Manchester and Liverpool. The main implications in the FEMA for Warrington are:
- A growing number of strategic sites which may compete with Omega although the immediate impact is expected to be limited, while competition will be offset by growth in demand driven by the expanding Port of Liverpool
 - The Manchester Ship Canal is a key asset in the FEMA and expansion at Port Warrington would help the Borough secure a share of its growth
 - Warrington is losing professional and scientific labour to Sci-Tech Daresbury, although the strong overlaps between Halton and Warrington in this area mean that Warrington Borough is still deriving economic benefit from this flow
 - Between Sci-Tech and The Heath Runcorn and the Cheshire Science Corridor Enterprise Zone Sites, the FEMA appears well catered for with science themed facilities
 - The strongest competition is from Manchester and this is inhibiting demand for larger office premises at present. For this reason, stakeholders argue that the Borough could not support a second large office focused employment area, alongside Birchwood.

- xiii) Sites in other local authority areas of the FEMA, even when of a strategic scale, will ultimately meet the OAN of those authorities rather than Warrington. The only exception would be, if realised, an expansion of Omega west into St Helens. Such a site would support both Warrington and St Helens and the two authorities would need to agree how the land supply resulting was divided between them.

Employment Land Supply and Need

- xiv) At 31st March 2016, there was a headline supply of 231.87 ha of available employment land, made up of 30 sites. This comprises a local supply of 82.24 ha in 23 sites (35.5 percent of the floorspace total), a strategic supply of 149.63 ha in seven sites at Omega (64.5 percent).
- xv) Of this supply, 127.34 ha comprises land now developed, held to meet the needs of individual companies only and land proposed for non B-Class uses. Excluding these gives a realistic land supply of 104.53 ha in 14 sites. Of this, 34.85 ha in 11 sites is the local supply.
- xvi) To assess need two recognised methods of forecasting have been used creating four distinct models of OAN. The outputs from these models are outlined in Table ES1. All OAN forecasts relate to the local authority area of Warrington Borough only.

Historic Land Take Up

- xvii) The first method is a forward projection of historic land take up trends to produce strategic/local and local only projections. Based on this projection, Warrington needs 380.90 ha of land on a strategic/local take up model, 238.16 ha on the local only model, inclusive of a five-year buffer each (see Table ES1). Against the realistic land supply of Warrington, there are shortfalls of 203.31-276.37 ha.

Labour Demand

- xviii) The second method looks at jobs growth, as identified in Oxford Economics and Cambridge Econometrics (2016) forecast modelling. As can be seen in Table ES1, regardless of whether the Oxford or Cambridge Forecasts are preferred, the resulting jobs based forecast model suggest the Borough has much smaller land shortfalls and even a modest oversupply in one case. This latter forecast incorporates large projected losses in manufacturing employment, projected to 2037 by both Oxford and Cambridge.

Table ES1 – Warrington Borough Land Forecast Models – Summary

Model	Land Stock 2016, ha – Strategic and/or Local Supply*	Land Need 2016-2037, ha	Buffer (five years further need) ha	Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for Devolution Bid**	Assumptions
Strategic/ Local Take Up	104.53 Strategic/ local supply	307.65	73.25	(276.37)	-	Based on historic (20 years) take-up of 14.65 ha/pa. Inclusive of take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture Devolution Bid figure not applicable to take-up scenarios Of the shortfall in this scenario: <ul style="list-style-type: none"> • 117.14 ha is primarily strategic (B8 uses) • 159.23 ha is primarily local in nature.
Local Take Up	34.85 Local supply	192.36	45.80	(203.31)	-	Based on historic (20 years) take-up of 9.16 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture Devolution Bid figure not applicable to take-up scenarios
Employment based on adjusted stock – Oxford Economics Model	34.85 Local supply	+64.78 Growth +41.47 Change	+15.42 +9.87	1) (45.35) 2) (16.49)	1) (102.03) 2) (73.17)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario
Employment based on adjusted stock – Cambridge Econometrics Model	34.85 Local supply	+58.79 Growth +23.83 Change	+14.00 +5.67	1) (37.94) 2) 5.35	1) (94.62) 2) (51.33)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore 2016

*Realistic land supply at 31st March 2016

**Further 56.68 ha of land need.

- xix) The Labour Demand models shown in Table ES1 are ‘policy-off’ forecasts that do not account for any public-sector plans or strategies for growth above the baseline. In terms of ‘policy-on’ modelling, sensitivity testing has been undertaken to understand the forecast growth, above the baseline, outlined in the 2014 SEP and the LEP’s projections which form part of the devolution deal currently under negotiation.
- xx) The 2014 SEP target ultimately proved no more ambitious than the baseline forecast position predicted by Oxford Economics and much less ambitious than the gain of forecast by Cambridge Econometrics. Thus, applying a ‘policy on’ scenario incorporating the SEP target would not deliver a jobs to land target significantly different from those set out above. If Warrington Borough ultimately secures 26.6 percent of the employment growth predicted in the Devolution Bid, equal to its current share of the sub-regional economy, the increase in employment in Warrington will be 29,728 over the study period 2016-2037. Measured against Cambridge Econometrics, the deal is forecast to provide a further 11,428 jobs to 2037. This can be translated to an additional land requirement of 56.68 ha. Added to the baseline Labour Demand models, the resulting land shortfall increases to a maximum of 102.03 ha.
- xxi) However, the market assessment and a review of the historic trends in employment change and land take up (see Section 8.0) suggest that these forecasts underestimate land needs significantly. **The preferred forecasting method is therefore a projection forward of past take-up rates that considers both strategic and local needs.**

Recommendations

- xxii) This report has had full regard to the requirements of the NPPF and the PPGs to encourage and deliver growth through the planning system. The key recommendations are:
- That the Council should adopt the strategic/local land take-up scenario. This suggests that the Borough has a further land need, additional to the current realistic supply, of 276.37 ha, to 2037
 - Within the baseline employment land supply, the following sites do not appear to be viable and deliverable for B1/B2/B8 uses. They should not be considered part of Warrington’s realistic land supply, although in most cases they remain within the Borough’s Employment Areas (as identified in the Core

Strategy Proposals Map under Policy PV1) and could not be developed for non B-Class uses without appropriate justification:

- Omega Phase 3 Remainder
- Site 216: Stanford House (Land at), Garratt Field, Birchwood
- Site 324: Land at Cameron Court/Colville Court/Chetham Court, Winwick Quay
- Site 353: 24 Kingsland Grange, Woolston
- Site 355: Perstorp UK Ltd, Baronet Road, Latchford
- Site 365: Calver Park, Calver Park Road
- Site 368: Plot 4 - Barleycastle Trading Estate, Lyncastle Road, Appleton Thorn
- Site 369: Tanyard Farm Estate, Rushgreen Road, Lymm
- Site 380: Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington
- Site 15 A(g): Phase 2 - Lingley Mere.
- Elsewhere, Warrington Borough Council generally needs to protect its employment sites from non-employment uses, such as housing or retail.
- The Council should designate nine key employment sites and areas to be safeguarded for B Class Uses and other employment uses which achieve economic enhancement. These are:
 - Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn
 - Birchwood (incorporating Birchwood Park)
 - Birchwood Boulevard
 - Centre Park
 - Gemini, Westbrook
 - Lingley Mere
 - Olympic Park, Birchwood
 - Winwick Quay
 - Woolston Grange.
- The Council should work with neighbouring authorities on issues in which interests will overlap
- Review and monitor the employment land and premises position and undertake the study again in about five years.

xxiii) The locational needs of the different B-Class uses are summarised in Table ES2.

Table ES2 — Locational Land Needs

Need by Use Class, ha	Locational Needs/Areas of Search
B1(a): 73.14	<p>Warrington Town Centre and Periphery</p> <ul style="list-style-type: none"> Focus for meeting local needs for sub-500sqm premises, including serviced accommodation Will build on the established regeneration schemes here – Stadium Quarter, Warrington Waterfront, Southern Gateway <p>East Warrington – North or South of Birchwood</p> <ul style="list-style-type: none"> Birchwood identified as the Borough’s main location for large floorplate and inward investment requirements of up to 2000 sqm Stakeholders supported further growth here and wished to discourage provision of a major new office centre elsewhere in the Borough that would compete with and dilute Birchwood’s offer The scale of need would support additional employment land in this area, either north of Junction 11, M62 or south of Birchwood.
B1(c)/B2: 14.73	<p>East Warrington – Locations in and around Birchwood and Woolston Grange</p> <ul style="list-style-type: none"> Strong stakeholder support for greater provision in East Warrington Woolston Grange is a key industrial centre for the Borough with ongoing demand for land and accommodation that is not being met. Birchwood also remains a strong focus for B1(c)/B2 demand with recent successful development of speculative premises in Birchwood Park There remains some scope for industrial refurbishment/redevelopment at Birchwood, with Trident Business Park identified as a key location Additional land in the Birchwood area could also provide growth opportunities for Woolston Grange. <p>M56 Corridor Focused at Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn</p> <ul style="list-style-type: none"> Stakeholder support for further local industrial opportunities in South Warrington, alongside the strategic provision discussed below The main brownfield growth opportunities are likely to be found in the development of the open storage yards in the south of the area, along Lyncastle Road.
B8 Strategic Demand: 117.14	<ul style="list-style-type: none"> Most logistics in Warrington is 100 percent road related and immediate motorway access is essential for any site looking to replicate the success of Omega and compete with other emerging motorway linked schemes elsewhere in the North West. <p>M62 Corridor</p> <ul style="list-style-type: none"> Locations on the M62, which link to the existing critical mass of Omega would be desirable for new strategic sites. <p>M56 Corridor</p> <ul style="list-style-type: none"> Stakeholders showed strong support for the provision of a new strategic site(s) along the M56 Corridor. Although this would likely require some Green Belt release the advantages include a greater body of potentially available land; links to the crucial Manchester-North Wales Corridor; the ability to build on the existing logistics base of Barleycastle Trading Estate/Stretton Green Distribution Park and the ability to provide greater employment opportunities in the south of the Borough <p>Port Warrington and Surroundings</p> <ul style="list-style-type: none"> A sub-set of the general need, focused on the Manchester Ship Canal and Port Warrington. The Liverpool LEP expect traffic along the Ship Canal to reach 30,000 containers a day, while growth pressures are already in evidence at Port Runcorn, which is now at capacity, and Port Salford which is seeing further development of food logistics.
B8 Local Demand: 47.49	<ul style="list-style-type: none"> Local warehousing demand is for properties of up to 5000 sqm, on sites of 1.3 ha or over. At the larger end, the locational needs of local B8 space will generally overlap with strategic, discussed above <p>East Warrington – Locations in and around Birchwood and Woolston Grange/ M56 Corridor Focused at Barleycastle Trading Estate/Stretton Green Distribution Park</p> <ul style="list-style-type: none"> Smaller scale need will overlap with B1(c)/B2 requirements as many larger manufacturing operations now incorporate elements of B8 storage Woolston Grange has been a historic centre for small-mid-sized logistics operations. South Warrington, Barleycastle Trading Estate/Stretton Green Distribution Park support strong cluster of logistics operations. Future B8 land allocations should look to build on these established locations
Mixed: 23.87	<ul style="list-style-type: none"> Most take up will be for B1(c), B2 or smaller B8 space. This will be subject to the same locational requirements as the other local industrial-warehouse uses described above.

1.0 INTRODUCTION

1.1 This report provides an economic development (employment land) needs study for Warrington Borough. It has been carried out on behalf of Warrington Borough Council (the Council).

1.2 As stated in the Study Brief, key aims of the Economic Development Needs Study are to:

- *“Identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and*
- *Provide an overview of the current profile of Warrington’s existing employment supply and an analysis of any gaps in the current land supply in terms of quality and location.”*

1.3 Reflecting the Study Brief and Planning Practice Guidance (PPG), the study objectives are to:

- *“Provide a clear assessment [of Objectively Assessed Needs] OAN for employment land and floorspace for B1(a) offices, B1 (b), B1 (c), B2 industrial, B8 warehousing and distribution, and employment related Sui Generis uses in Warrington up to 2037 (to align with the Mid Mersey SHMA), taking account of economic forecasts, past take-up and existing and likely future market conditions. Forecasts should be broken down into 5-year time periods if possible*
- *Provide an overview of the quality of existing employment land and premises in Warrington*
- *Provide a review and analysis of the Warrington commercial property market including recent national and regional trends in demand for, and the supply of, industrial, distribution and office premises and the factors affecting these*
- *Provide an assessment and recommendation of what is Warrington’s Functional Economic Market Area (FEMA) in the context of Warrington’s current Local Enterprise Partnership (LEP) geography*
- *Update the economic factors driving the demand for employment land in the Borough including analysis of the 2011 Census data, ONS 2012-based Sub National Population Projections and DCLG 2012-based Household*

Projections

- *Advise which sectors of employment are likely to grow or contract over the Plan period and how this translates into job numbers and additional employment floorspace requirements*
- *Analyse market signals including trends in commercial rents, yields and land values*
- *Provide a profile of what activities and business types seek industrial space in the Borough, why they want to be there and what their alternative choices of location may be*
- *Undertake appropriate stakeholder consultation with organisations with an interest in the supply of employment land including employers, business groups, property agents, developers and neighbouring local authorities*
- *Provide recommendations for planning policy development based on the findings of the Study.”*

1.4 BE Group, Warrington-based economic development and property consultants, compiled this report during April-August 2016. BE Group was supported by economic development consultancy Mickledore. The study updates and supersedes Warrington’s previous employment land evidence base documents, specifically the 2012 Warrington Employment Land Review.

1.5 In addition to this study, a further piece of work has been undertaken by Mickledore and forms part of the Council’s evidence base, looking at alternative economic forecasts in more detail.

Background

1.6 Warrington’s Local Plan Core Strategy was adopted in July 2014. Following its adoption, a successful High Court legal challenge was made with respect to the Core Strategy’s housing policies (Warrington Borough Council v Satnam Millennium Ltd, 2015), in particular the housing target. The parts of the Core Strategy which have been overturned are:

- The housing target of 10,500 new homes (equating to 500 per year) between 2006 and 2027
- References to 1,100 new homes at the Omega Strategic Site.

1.7 Employment and economic development policies remain unchanged.

- 1.8 Since the decision, the Council has updated its Strategic Housing Land Availability Assessment (SHLAA) to identify the land available for housing over the next 15 years. The Council has also undertaken a Strategic Housing Market Assessment (SHMA) to establish the OAN for housing in Warrington.
- 1.9 These studies identified that the OAN for housing outstrips planned housing land supply, with further allocations likely required. However, it is not possible to look at housing supply and demand in isolation as housing provision impacts, and is impacted upon, by the broader economic market. To reflect this the Council intends to undertake a more fundamental review of the Plan than currently envisaged in the 2015 Local Development Strategy.
- 1.10 The Local Plan's evidence base as a whole is now being reviewed and this Economic Development Needs Assessment will form an important part of this review.

Methodology

- 1.11 Research methods used include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with a number of the Borough's major developers/landowners and key public sector agencies and sources of ongoing business engagement utilised. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken.
- 1.12 The Functional Economic Market Area (FEMA) of Warrington is identified using methods identified in Planning Practice Guidance (PPG) and the property market in the local authority areas within the FEMA has been reviewed. This has been undertaken through consultations with officers from the relevant Councils, combined with desktop analysis of the Employment Land Studies and Local Plans of those local authorities.
- 1.13 Finally, the land supply has been assessed against forecast and population/housing data to understand the future need for any additional employment land. This is then developed into a series of economic development recommendations that cover not just land, but also premises.
- 1.14 Attached at Appendix 1 is a list of all consultees.

Employment Land Review Guidance

1.15 The Employment Land Needs Study will need to take account of recently published PPGs, which provides guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes have been produced – *Housing and Economic Land Availability Assessment* which provides a methodology of reviewing suitable land, and *Housing and Economic Development Needs Assessments*, which provides guidance on how future needs can be determined. The assessment process takes the form of a five-stage methodology under the following headings:

- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This will be a desk top review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
- **Stage 2: Site/broad location assessment** to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability' in order to confirm which of them are unsuitable for/unlikely to continue in B1/B2/B8 employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise will help to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:
 - *"The recent pattern of employment land supply and loss to other uses (based on extant planning permissions and planning applications). This can be generated through a simple assessment of employment land by sub-areas and market segment, where there are distinct property market areas within authorities.*
 - *Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums).*
 - *Market signals, such as levels and changes in rental values, and differentials between land values in different uses.*

- *Public information on employment land and premises required.*
- *Information held by other public sector bodies and utilities in relation to infrastructure constraints.*
- *The existing stock of employment land. This will indicate the demand for and supply of employment land and determine the likely business needs and future market requirements (though it is important to recognise that existing stock may not reflect the future needs of business). Recent statistics on take-up of sites should be consulted at this stage, along with other primary and secondary data sources to gain an understanding of the spatial implications of ‘revealed demand’ for employment land.*
- *The locational and premises requirements of particular types of business.*
- *Identification of oversupply and evidence of market failure (e.g. physical or ownership constraints that prevent the employment site being used effectively, which could be evidenced by unfulfilled requirements from business, yet developers are not prepared to build premises at the prevailing market rents).”*
- **Stage 3: Windfall assessment** Not applicable as relates to housing only.
- **Stage 4: Assessment review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of ‘gaps’ in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
 - Sectoral and employment forecasts and projections (labour demand)
 - Demographically derived assessments of future employment needs (labour supply techniques)
 - Analysis based on the past take-up of employment land and property and/or future property market requirements.

The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering Warrington’s Local Plan period and an analysis of the likely ‘gaps’ in supply that need to be filled

- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in the Local Plan. The

Review is prepared in line with this advice.

- 1.16 Table 1 shows how the Employment Land Assessment aligns with this Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Location Identification	
Step 1 – Determine assessment area and site size	Undertaken by Warrington Borough Council
Step 2 – Desktop review of existing information	Covered in Sections 2, 3, 4, 5, 6
Step 3 – Call for sites / broad locations	To be completed within the ongoing Local Plan update process
Step 4 – Site / broad location survey	Covered in Sections 6, 10, 11
Stage 2 – Site / Broad Location Assessment	
Step 5 – Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Section 6 and Appendices
Step 6 – Overcoming constraints	Covered in Section 6 and Appendices
Stage 3 – Windfall Assessment	
Step 10 – Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Step 11 – Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 8
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	EDNS produced by BE Group/Mickledore and monitoring undertaken by Warrington Borough Council

Source: BE Group 2016

2.0 STRATEGIC CONTEXT

Introduction

- 2.1 This section focuses on national, regional and local reports and strategies that have a relevance to the allocation of employment land and premises. It updates the policy position from the 2012 Employment Land Review.
- 2.2 It should be noted that the Warrington Borough Council Local Economic Assessment 'The Story of Place' (2011) is not reviewed here. Rather this Study undertakes an updated assessment of local economic conditions in Section 3.0.

National Policy

National Planning Policy Framework (2012)

- 2.3 The NPPF sets out the Government's economic, environmental and social planning policies for England, articulating the Government's vision of sustainable development. It provides a framework for the production of local and neighbourhood plans.
- 2.4 The NPPF requires local authorities to set a clear economic vision and strategy based on an understanding of the existing business needs, likely changes in the market and any barriers to investment. This understanding should be achieved through working with the local business community, neighbouring local authorities and the Local Enterprise Partnership (LEP).
- 2.5 Paragraphs 18 to 22 of the NPPF establish that the Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth, and that significant weight should be placed on the need to support economic growth through the planning system. It sets out a requirement for local planning authorities to plan proactively to meet the development needs of businesses and support an economy fit for the 21st Century.
- 2.6 In drawing up local plans, the NPPF requires local authorities to:
- Set out a clear economic vision and strategy
 - Set criteria or identify strategic sites for local and inward investment
 - Support existing business sectors and where possible identify and plan for new

- or emerging sectors likely to locate in the area
 - Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries
 - Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement
 - Facilitate flexible working practices.
- 2.7 Paragraph 22 states that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.
- 2.8 Paragraphs 160 and 161 set out that local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To do this they should work with Local Enterprise Partnerships, the business community, county and neighbouring authorities to understand business needs, likely changes in the market and barriers to investment. They should use their evidence base to assess the land and floorspace for economic development, including the quantitative and qualitative needs for all foreseeable types of economic activity and the existing and future supply of land.

Northern Powerhouse

- 2.9 The Cheshire and Warrington economy sits within an area which is being termed 'The Northern Powerhouse' by Government. This is an initiative to try and boost investment in the North of England and rebalance the economy. The Powerhouse does not have absolute boundaries but it is primarily focused on the regions of the North West, North East and Yorkshire and Humberside.
- 2.10 The Northern Powerhouse concept puts greater emphasis on attracting investment into the area which is also a target for increased transport spending. Transport for the North has been formed to examine the opportunities.
- 2.11 The Northern Powerhouse does not yet have a formal set of objectives or a strategy, but in summer 2016 a Northern Powerhouse Independent Economic Review was published by Transport for the North. This defines outcomes for the Northern

Powerhouse, including:

- The generation of 850,000 new jobs by 2050 over the baseline position of 710,000 jobs which will be created in any event.
- That productivity will increase by 4 percent more than the baseline forecast
- That GVA will be 15 percent higher.

2.12 The areas of growth that will help drive this change in performance are identified as advanced manufacturing, health innovation, digital and energy

2.13 Warrington is within the Northern Powerhouse area and is in a position to benefit from wider investment. The tangible project currently being considered, which would have a direct impact on Warrington, is HS3. This new fast rail line would join Liverpool to Leeds and beyond. The issue will be whether Warrington has a station which can take advantage of this new line.

LEP Area Policy

“Cheshire and Warrington Matters”: Cheshire & Warrington LEP – Strategic Economic Plan (SEP) (2014)

2.14 Cheshire and Warrington Matters (the SEP) establishes the Cheshire and Warrington LEP’s investment proposals for the Local Growth Fund and how they will *“deploy this fund to deliver 3,125 additional homes, and 12,473 new jobs over the next three years.”*

2.15 The vision of the SEP is that by 2021 Cheshire and Warrington will be:
“An economy of £26.6bn with GVA per head 110% of the UK average”

2.16 By 2030 Cheshire and Warrington will be:
“An economy of £35bn with GVA per head 115% of the UK average. Home to an additional 100,000 residents, 75,000 new jobs and 70,000 new homes.”

2.17 To achieve this vision, the SEP sets out six ‘*Strategic Imperatives*’:

- *“SI1: Specialised and differentiated sectorally, and delivering a manufacturing renaissance*
- *SI2: Attracting and retaining talent*
- *SI3: Equipped for market and technology change*

- *SI4: Maximising our growth assets – property and place*
- *SI5: Restoring our worker productivity premium*
- *SI6: Internationally connected and engaged.”*

2.18 To help achieve the vision/Strategic Imperatives, three Intervention Priorities are set out (see Table 2).

Table 2 – Intervention Priorities Summary

Priority	Costs	Outputs	Geographic Projects Relevant to Warrington
<p>Atlantic Gateway A trade, logistics, business and innovation corridor stretching from Deeside and Merseyside through the northern part of Cheshire and Warrington to Manchester.</p>	<p>Local Growth Fund: £45.87 million Total Investment: £76.28 million</p>	<p>45,955 jobs 1,300 homes £1,912 million private sector investment 732,450 sqm floorspace £593.1 million additional GVA</p>	<p>Warrington Waters: a programme of projects which together will expand Warrington’s Town Centre and create a new major mixed use development area set alongside the Manchester Ship Canal and River Mersey – including expanding Port Warrington and enhancing bridge crossings. This includes the Warrington Engineering UTC and Incubator (The Base). Warrington West: A programme of projects which together enable business locations of international importance and scale to be developed at Omega and Lingely Mere. Warrington East: Enhancement of established business locations including Warrington’s Nuclear Cluster, focusing on Birchwood Park</p>
<p>Science Corridor A string of interconnected centres of excellence located in Cheshire which are or have the potential of contributing significantly to national innovation in science.</p>	<p>Local Growth Fund: £36.40 million Total Investment: £98.08 million</p>	<p>4,690 jobs 500 homes 82,968 sqm floorspace £78 million private sector investment £214 million additional GVA</p>	<p>This includes the science and nuclear cluster of Birchwood Park. The wider Science Corridor achieved Enterprise Zone Status in late 2015 (see below).</p>
<p>Crewe High Growth City (Phase 1) Placing Crewe at the heart of HS2 as a superhub</p>	<p>Local Growth Fund: £52.6 million Total Investment: £108.98</p>	<p>7,850 jobs 3,970 homes 143,000 sqm floorspace £33.78 million private sector</p>	<p>-</p>

Priority	Costs	Outputs	Geographic Projects Relevant to Warrington
central to the countries' major infrastructure network.	million	investment £8 million additional GVA	

Source: Cheshire and Warrington LEP, 2014

2.19 Funding for these Priorities will be supported by a Local Growth Fund (LGF) deal. In return for a LGF settlement of £124.8 million, the following outputs will be delivered (Table 3).

Table 3 – Summary Outputs

Total Outputs	2015/16 – 2017/18	2018/19 plus
Jobs	12,473	60,070
Homes	3,125	7,170
Floorspace (sqm)	230,294	972,923
Private Sector Leverage (£, million)	£172.31	Over £2,000
Public Sector Leverage (£, million)	£80.16	Over £70

Source: Cheshire and Warrington LEP, 2014

European Strategic Investment Funds (ESIF)

2.20 At the same time as the formulation of the SEP, the LEP set out its operational programme for European funding. This considered how the local allocation to Cheshire and Warrington of £123.7 million pounds is managed and spent to deliver growth and jobs in the LEP area.

2.21 The ESIF programme will focus on:

- Strengthening Research, Technological Development and Innovation
- Helping Businesses to Benefit from ICT and High Speed Broadband
- Enhancing the Competitiveness of Small and Medium Enterprises
- Supporting the Shift towards a Low Carbon Economy in All Sectors
- Promoting Employment and Supporting labour Mobility
- Promoting Social Inclusion and Combating Poverty
- Investing in Education, Skills and Lifelong Learning
- Investing in the Rural Economy.

Energy

- 2.22 As a result of the SEP and the ESIF Strategy being completed, and the identification of a number of key energy related issues and opportunities, the LEP has now examined the possibility of the inclusion of the energy sector as a fourth priority.
- 2.23 In the research report “*The economic potential of low carbon and environmental goods and services (LCEGS) sector in Cheshire and Warrington*” (2013), there was recognition of the strengths of the nuclear industry across Cheshire and Warrington and particularly Warrington. Also the need for investment in skills to maintain this strength. There was also recognition of the opportunities offered by shale gas for the area and the benefits that some locally generated energy could have on the high energy users of the LEP area.
- 2.24 An issue for Warrington will be whether shale licenses will be sought in the Borough and the planning implications of any operator wishing to investigate the shale gas opportunities.

Cheshire Science Corridor Enterprise Zone Prospectus (2016)

- 2.25 In November 2015, the Science Corridor, including the Birchwood Nuclear Cluster (Birchwood Park, along with areas of Kelvin Close and Daten Park totalling 20 ha), achieved Enterprise Zone status. The benefits to companies within a zone can include:
- Five-year Business Rate Relief for occupiers of up to £55,000/year or first year Enhanced Capital Allowances dependent upon the site
 - A streamlined planning process with dedicated pre-application advice
 - Access to business support
 - A commitment to enhance broad band infrastructure
 - Closer working with UKTI to attract more foreign investment.
- 2.26 It is estimated that the Enterprise Zone has the potential to create 20,000 jobs and attract 500 businesses to the area.

Local Policy

Warrington’s Local Plan Core Strategy (Originally Adopted 2014)

- 2.27 Warrington’s Local Plan Core Strategy is the strategic policy document which sits at the heart of the Local Planning Framework. The Core Strategy provides “*a planning*

framework for guiding the location and level of development in the borough up to 2027.”

- 2.28 As noted in Section 1.0, the Core Strategy housing targets set out in Policy CS2 (Quantity and Distribution of Development) have been overturned in a High Court Decision. Policy CS2 also requires that 277 ha of land for business, general industrial and storage/distribution be made available, to 2027, *“to support growth of the local and sub-regional economy.”* This policy target is not affected by the High Court ruling.
- 2.29 Two strategic development locations of note are detailed in Policy CS7 (The Town Centre) and Policy CS8 (Omega and Lingley Mere). Policy CS7, seeks to support development in the Town Centre and improve its viability and vitality. *“At Lingley Mere the ongoing development of the site for primarily B1(a) and B2 uses in accordance with existing consents will continue to be supported. At Omega, Phases 1 and 2 benefit from existing consents for B1, B2, B8 development.”* The whole of the 267 ha site is identified as a strategic location for economic growth. Phases being developed and those which currently remain undeveloped will contribute to the Borough’s future employment land supply. *“As at 1st April 2012, 71 ha of the land at Omega was required for employment uses within the plan period. The site could accommodate between 12,000 and 20,000 jobs when fully built out.”*
- 2.30 Proposals for office development at Omega will require sequential testing and market appraisal. Ancillary uses (retail, leisure, hotel and conference facilities) of an appropriate scale and nature to provide a business services hub to serve the development as a whole, will be supported. *“The Council will not support proposals to develop the strategic location which seek to develop the remaining extensive and open areas of each site in a piecemeal or disjointed manner.”*
- 2.31 Policy CS9 highlights that Inner Warrington *“will continue to be the focus of development and physical change in the Borough.”* Strategic locations relating to this include the Waterfront and Arpley Meadows (Policy CS10) which offers the prospect of employment options within a housing-led, mixed use scheme. Indicative master planning, in 2008, proposed up to 2,700 new homes and 390,000 sqm of commercial space (including office and employment floorspace, a local centre and hotel), on 70 ha of land.

- 2.32 Also Port Warrington, on the Manchester Ship Canal (Policy CS11) which comprises *“an existing warehouse complex and the adjoining site to the east which together have the capability to become a multi modal port facility utilising the ship canal with an opportunity for rail freight.”* Port Warrington is in the Green Belt and so careful consideration of the environmental, social and transport related impacts of any scheme will be required.
- 2.33 It is noted in Policy PV1 (Development in Existing Employment Areas) that *“the Council will support development, redevelopment and changes of use proposals within existing employment areas...”* provided that the proposed use falls within the B Use Classes or related Sui Generis classifications. B1(a) office development proposals *“will need to be justified by reference to sequential testing and market appraisal to determine that the development could not be appropriately located on a more accessible central within or close to the Town Centre in accordance with the Overall Spatial Strategy.”* Subject to the assessment of local transport impacts, major warehousing and distribution developments will be primarily directed towards:
- Appleton and Stretton Trading Estates
 - Omega
 - Woolston Grange.
- 2.34 Where major warehousing and distribution developments are proposed outside of these areas, proposals should seek to locate development:
- *“Away from areas sensitive to heavy vehicle movement*
 - *With direct access to the Primary Road Network*
 - *With access to rail or the Ship Canal where possible.”*
- 2.35 At Fiddlers Ferry Power Station (Policy PV2) the Council will support development which *“enhances the existing employment opportunities at the facility and which continues investment in power generation and provides opportunities for the establishment of related development.”*
- 2.36 Policy PV 4 defines the importance of the Town Centre and Primary Shopping Area. Relevant development outside of the Primary Shopping Area and defined development areas, discussed below, will be subject to sequential and impact testing. Key development sites in the Town Centre are defined in Policy TC1 as:

- *“The Bridge Street and Time Square area for mixed use development including leisure, retail, cinema and office uses*
- *The Stadium/Winwick Street area for mixed use development complementary to the Bridge Street and Time Square area*
- *Bank Park area for mixed use small scale residential and office development*
- *Palmyra Area and Wilson Patten Street for mixed use development including residential, offices and leisure.”*

2.37 Longer term development opportunities may also be considered at:

- Bank Quay and Wilderspool Causeway
- Town Hill and Cockhedge.

2.38 In Policy SN6 (Sustaining the Local Economy and Services) *“the Council will seek to assist the continued viability and growth of the local economy and support the sustainability of local communities by ensuring development proposals; do not lead to the loss of viable, accessible sites and buildings used for industrial/commercial purposes or other employment generating uses in local communities.”* Farm diversification and the sustainable growth of existing businesses will also be supported.

2.39 Finally, Policy IW1 notes that the Council will support and promote redevelopment and regeneration opportunities along the A49 corridor, for B-Class employment uses, transport benefits and infrastructure and environmental benefits.

Employment Land Review (2012)

2.40 The Warrington Employment Land Review (the ELR) did not identify a land need for the Borough but rather looked at the trajectory of land supply along with local economic conditions. It highlighted that against a then Unitary Development Plan (UDP) target of 310 ha of employment land to 2016, Warrington Borough had a total committed and identified supply of 233.23 ha, for the period 2003-2011. The ELR also looked at employment levels in the Borough. However, the data used is now seven years old and is not repeated here.

2.41 In considering Warrington’s employment land supply, the ELR summarised the earlier Cheshire and Warrington Sub Regional Employment Land and Site Study (2009). Reviewing regional and sub-regional sites in Cheshire and Warrington, that study identified Omega and Central Warrington (Waterfront area) as locations of

regional significance and Birchwood Park Parcel 7 as a sub-regional site. Woolston Grange was also identified as an important area. Again references to those sites are now seven years old and not repeated here, rather a fully updated review of Warrington’s employment land supply and Employment Areas is provided in Section 6.0.

Warrington Means Business and Strategic Update on Projects (2013)

2.42 Warrington Means Business is the Council’s (Warrington & Co’s) programme of development to aid in the economic growth in the Borough. The document also refreshes and updates the Warrington Regeneration Framework (2009).

2.43 Warrington Means Business establishes a number of strategic outcomes based upon the planned developments that:

- *“Deliver £250 million of priority growth enabling infrastructure*
- *Enable 60,000 new jobs and retains existing jobs*
- *Create 12,000 plus new aspirational and affordable homes*
- *Enable a £1.9 billion plus, GVA pa increase*
- *Enable £2.1 billion plus, private sector investment*
- *Create new sustainable communities*
- *Reinforce the vitality and viability of Warrington Town Centre*
- *Re-invigorate Warrington’s enterprise culture*
- *Enable a skilled workforce tailored to Warrington’s current and future business needs.”*

2.44 Core components of the strategy, relevant to this study, are summarised in Table 4.

Table 4 – The Warrington Means Business Programme – Relevant Components

Category	Component	Comments
Reinforcing the heart of the Town	Delivering Warrington Waters	The revitalisation of the core of the Town, including: <ul style="list-style-type: none"> • The Town Centre – its development and evolution. The main development sites are: <ul style="list-style-type: none"> ○ Stadium Quarter – A mixed-use living and working community linking the stadium the Town Centre ○ School Brow / Church Street – Eastern gateway into the Town Centre ○ Bank Park – Its improvement as the principle Town Centre park ○ Palmyra Cultural Quarter and the Cabinet Works – Reinforcing Warrington’s cultural

Category	Component	Comments
		<p>scene and the redevelopment of the Cabinet Works area for homes and businesses</p> <ul style="list-style-type: none"> ○ Town Hill and Cockhedge – A new link into the Town Centre retail streets, reconstructing Scotland Road and the redevelopment of Cockhedge as a mixed use area ○ Bridge Street Quarter – A new leisure, retailing and civic quarter ○ Bank Quay Gateway – The creating of a mixed use area centred on a redeveloped main-line rail station ○ Wilson Patten Place – A new Town Centre business district ○ Southern Gateway - Howley Quay/Riverside – Waterfront housing ○ Southern Gateway - Wilderspool Gateway– A major mixed use development marea at Wilderspool and creation of a new landmark Southern gateway into the Town Centre. <ul style="list-style-type: none"> ● 'Its All Going on in Warrington' – Cultural events ● Warrington Waterfront ● Port Warrington ● Warrington Waters – open space and parks.
Places for Business growth	Delivering Warrington North	<p>The reinforcement of existing business locations, the rejuvenation of others and new major employment orientated areas:</p> <ul style="list-style-type: none"> ● Omega ● Lingley Mere ● Gemini ● Birchwood Park ● Woolston Grange ● Winwick Road Corridor.
	Hinterland Employment Areas	<p>Warrington has some large and critical employment sites within its economic gravity and on its boundaries:</p> <ul style="list-style-type: none"> ● Daresbury Science Park and Enterprise Zone (Sci-Tech) ● Preston Brook.

Source: Warrington Borough Council/Warrington & Co, 2013

Warrington Town Centre South Strategic Masterplan Framework (2008)

2.45 The Waterfront Strategic Masterplan Framework is a high-level strategic masterplan to secure the revitalisation of this Warrington Town Centre (South). It will seek to steer development over the 22 years to 2030. Its key outputs are:

- 2,000 new homes (40 percent affordable)
- Up to 139,000 sqm of commercial space
- 70.1 ha of land brought back into use.

- 2.46 This strategy is currently being revised, with the amended version not expected to be published in the lifetime of this study. Thus this, now dated, version of the Waterfront Strategic Masterplan Framework is not reviewed further.

Neighbourhood Policy

Appleton Parish Thorn Ward Neighbourhood Development Plan to 2027 (Submission Version, May 2016)

- 2.47 Appleton Parish Council successfully applied to Warrington Borough Council in 2015 for designation as a neighbourhood area. A Neighbourhood Plan has since been produced to submission stage. The designated area covers 601 ha, 46.4 percent of the Appleton Parish.
- 2.48 Policy AT-E1 (New Local Employment Opportunities) indicates that new development should:
- *“Give priority to the re-use of a brownfield site, or the conversion of an existing building,*
 - *... not have a detrimental impact on surrounding residential character and amenity,*
 - *... not lead to the loss of open space or green infrastructure,*
 - *[Be] located close to existing highways and do not have an unacceptable impact on traffic.”*
- 2.49 The preferred locations for employment development are Appleton and Stretton Trading Estates.

Summary

- 2.50 It is a responsibility of local government to support and encourage economic growth. This includes the provision, initially through planning policy, of sufficient employment land and premises. This must be of the right scale, type, location, be readily available for development and be well related to the strategic or local highway network according to the nature of the site and the function of the settlement. One of the most important issues to consider is that the land must be allocated in sustainable locations and be readily capable of development. The employment land portfolio needs to be balanced and to adequately cater to all sectors of the economy, i.e. small and large businesses, offices and industrial, high and low quality

operations.

- 2.51 LEP area targets, to 2030, are for “*an economy of £35bn with GVA per head 115% of the UK average....an additional 100,000 residents, 75,000 new jobs and 70,000 new homes.*” Intervention Priorities in the SEP are focused around the Atlantic Gateway, Science Corridor and Crewe High Growth City (Phase 1). The Science Corridor, including the Birchwood Nuclear Cluster (Birchwood Park), achieved Enterprise Zone status in November 2015.
- 2.52 The Core Strategy requires that to the 277 ha of land for business, general industrial and storage/distribution be made available, to 2027. This includes the strategic site at Omega and Lingley Mere, which extends to some 267 ha overall. The site could accommodate between 12,000 and 20,000 jobs when fully built out. Other strategic locations in the Borough, with potential for B-Class development, include the Waterfront and Arpley Meadows as well as multi-modal facilities (existing and proposed) at Port Warrington, on the Manchester Ship Canal.
- 2.53 Regeneration is focused on the Warrington Town Centre and Warrington Waters, with ten development sites identified. Also in the north of the Warrington urban area, where the strategic employment areas and employment sites are found, namely – Omega, Lingley Mere, Gemini, Birchwood Park, Woolston Grange, Winwick Road Corridor. Finally, consideration needs to be given to key locations to the west, along the M56, which fall within the economic influence of Warrington but outside of the Borough’s administrative boundary – namely Daresbury Science Park and Enterprise Zone (Sci-Tech) and Preston Brook in Halton.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

- 3.1 This section provides a summary profile of the prevailing social and economic conditions in Warrington. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth. It also provides an important context for understanding economic demand/need, having regard to the wider regional and national economies.
- 3.2 This section therefore considers the size of the economy, where businesses are located and in which sectors these businesses operate. By appreciating these aspects, it is easier to facilitate economic development by allocating land and premises of the most appropriate type and in the correct locations. The profile is a result of secondary research, drawing together a number of existing data sources. It also uses demographic data to build the picture and show the forecasts for the future produced by the Office of National Statistics (ONS).
- 3.3 Local planning authorities should have a clear understanding of needs and a knowledge of performance against neighbouring areas, as well as sub-regional and national averages. At the sub-regional level, to some extent planning and economic development is now influenced by the Cheshire and Warrington LEP. Within this section therefore, Warrington is compared to the LEP area, the region and national averages to give a more informed picture of the position of the economy.
- 3.4 Finally, it should be noted that commuting patterns are discussed separately in Section 7.0 where they help to define the FEMA.

Economic Assessment – Population and Labour Market

Population

- 3.5 The estimated population of Warrington in 2014 was 206,400. Over the last 20 years, the Borough has experienced population growth of 10 percent which equates to an increase of 19,154 residents (see Table 5). This growth has outpaced that of the wider LEP area and is significantly ahead of the population growth experienced by the Region as a whole. Warrington did however lag slightly behind the growth experienced nationally.

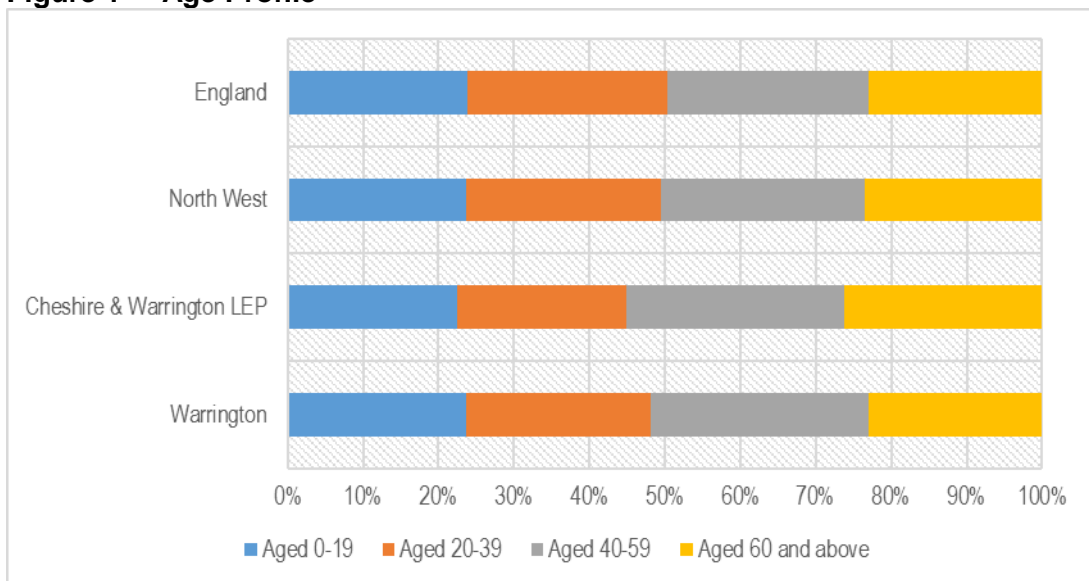
Table 5 – Population 1995-2014

	1995	2014	Change 1995-2014	
			No.	Percent
Warrington	187,274	206,428	19,154	10.2
LEP	853,412	912,817	59,405	7.0
North West	6,827,940	7,132,991	305,051	4.5
England	48,383,461	54,316,618	5,933,157	12.3

Source: ONS Population Estimates, 2014

- 3.6 The age profile of Warrington residents is shown in Figure 1. The Borough's profile broadly reflects wider trends, but is also consistent with Warrington town gaining new town status in the late 1960s. The greatest proportion of the local population is now aged 40-59, reflecting population influx into the New Town in the 1970s and 1980s of young families. The proportion of the population in this category in Warrington is slightly higher than the regional or national average.

Figure 1 – Age Profile



Source: ONS Population Estimates, 2014

- 3.7 It was estimated in 2013 that 6 percent of the Borough's population was born outside the UK which equated to 12,000 residents. In the North West 8 percent and across England 14 percent of the population as a whole was estimated to have been born outside the UK in that year. In recent years Warrington has also been the net recipient of internal UK migration, as shown in Table 6.

Table 6 – Internal UK Migration, to/from Warrington

	Inflow	Outflow	Net
2012	6,935	6,800	+135
2013	6,962	6,301	+661
2014	7,195	6,699	+496

Source: ONS migration statistics, 2014

Economic Activity

- 3.8 Warrington has a strong labour market with 105,000 economically active residents. This represents 81.5 percent of the workforce and as such economic activity rates in Warrington are higher than LEP area, regional or national averages (see Table 7).
- 3.9 The unemployment rate for Warrington exceeds that of the LEP area although is lower than the regional or national average. At December 2015 there were 4500 people registered as unemployed and this represented 4.3 percent of the economically active labour force.

Table 7 – Economic Activity 2015

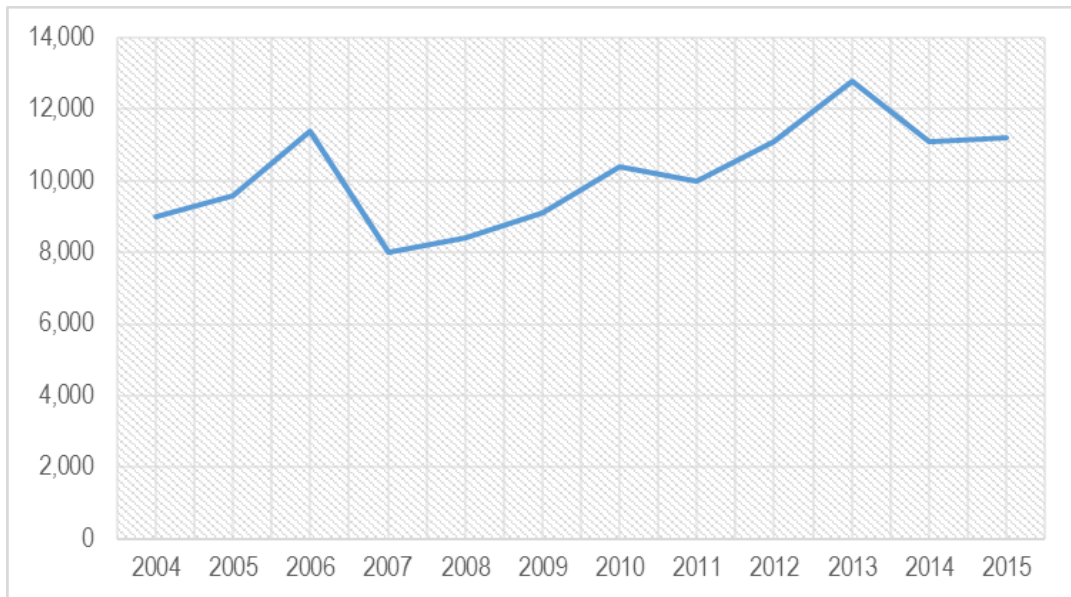
	Warrington		LEP	NW	England
	No.	Percent	Percent	Percent	Percent
Economically Active	105,000	81.5	78.2	75.3	78.0
Employment	100,400	78.0	75.2	71.2	73.9
Self-employment	11,200	8.7	9.5	8.8	10.4
Unemployment	4500	4.3	3.9	5.4	5.3
Inactive	23,800	18.5	21.8	24.7	22.0

Source: Annual Population Survey, 2015

Self-Employment and Homeworking

- 3.10 Warrington has a lower proportion of self-employment than the LEP area, the North West Region or national averages. Locally, however, self-employment does appear to be on an upward trend and grew rapidly between 2011-2013 before reducing slightly (see Figure 2). The number of people working for themselves in Warrington was 11,200 in 2015 and this represented 8.7 percent of the working age population.
- 3.11 9.3 percent of Warrington residents work from home which is less than for the LEP as a whole (11.4 percent) or compared to the national average (10.4 percent). The figure is likely to under-represent the full scale of homeworking as further people will work from home some days in a week.

Figure 2 – Self Employment in Warrington, 2004-2015



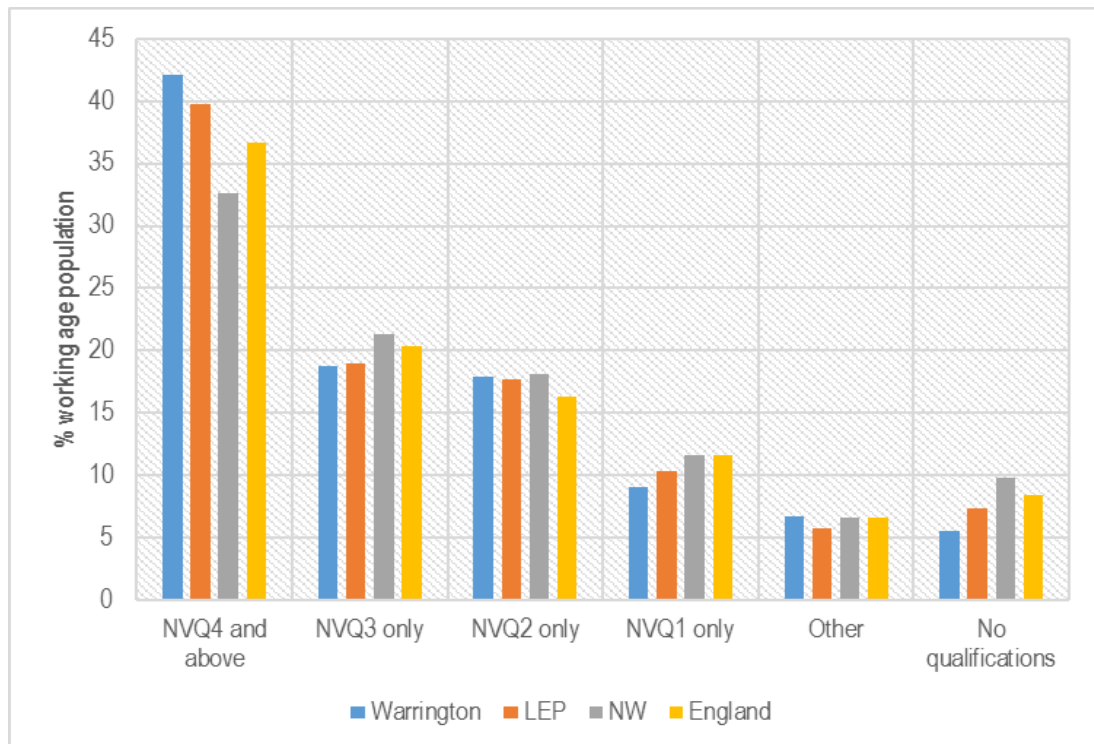
Source: ONS Annual Population Survey, 2015

- 3.12 Warrington appears to be unusual insofar as homeworking dropped considerably between the 2001 census, when home working was recorded as 7,541, and the 2011 census when the figure had dropped to 4,648 – a decrease of 38 percent.

Skills and Qualifications

- 3.13 The residents of Warrington are highly qualified in comparison to that of the wider LEP area, the North West and England as a whole (see Figure 3). In Warrington 42 percent of residents are qualified to NVQ level 4 or above (equivalent to degree level) and the equivalent figure is 40 percent for the LEP and 37 percent for England as a whole. Warrington also has a lower proportion of the working age population with no qualifications than the comparator areas. Just 6 percent of the working age population have no qualifications in the Borough, whereas 8 percent have no qualifications across England.

Figure 3 – Level of Qualifications of Residents, 2015



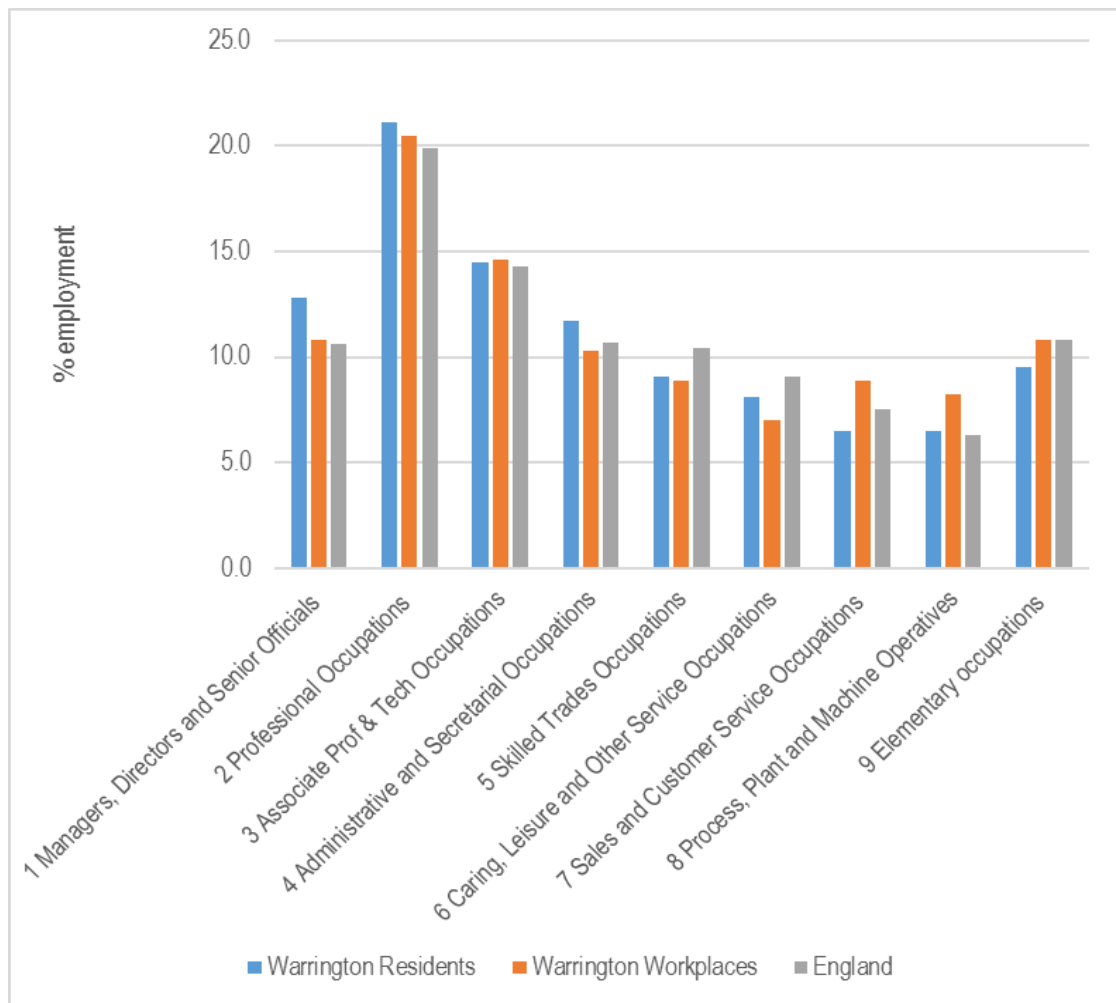
Source: ONS Annual Population Survey, 2015

Occupations

3.14 The occupational profiles of the Warrington employment base (based on those who work in the area) and resident base (based on those who live in the area) have some significant differences (see Figure 4):

- There is a higher proportion of managers, directors and senior officials in Warrington residents than in Warrington workplaces and this is also (marginally) the case for professional occupations
- There is a higher proportion of Warrington residents involved in administrative activities than in Warrington workplaces and this is also the case for caring professions
- Conversely the Warrington workforce contains a higher proportion of sales / customer service occupations; machine operatives; and those involved in elementary occupations than is the case amongst Warrington residents.

Figure 4 – Occupations for Warrington Employees / Residents 2015



Source: ONS Annual Population Survey, 2015

Annual Pay

3.15 Resident based earnings are significantly higher than workplace earnings in Warrington, with an average resident wage which is £2,300 above the average workplace wage (see Table 8). While wages for Warrington residents and workers are below the average for the LEP, Warrington residents do earn more than the average for England.

Table 8 – Annual Pay (£)

	Resident	Workers
Warrington	28,241	25,911
LEP	28,281	26,355
North West	25,721	25,681
England	27,869	27,872

Source: Annual Survey of Hours and Earnings, 2015

Economic Assessment

3.16 This section measures sectoral employment using Business Register and Employment (BRES) data for the period 2008 to present and Annual Business Enquiry (ABI) data for more historic trends. Both datasets are based on sample surveys of employment in UK companies. In the case of BRES a survey of 80,000 businesses, around 3.3 percent of the total is undertaken and then extrapolated for the whole. Accordingly, all sectoral employment figures given in this section should be treated as indicative rather than definitive.

Employment Change over the last 16 years

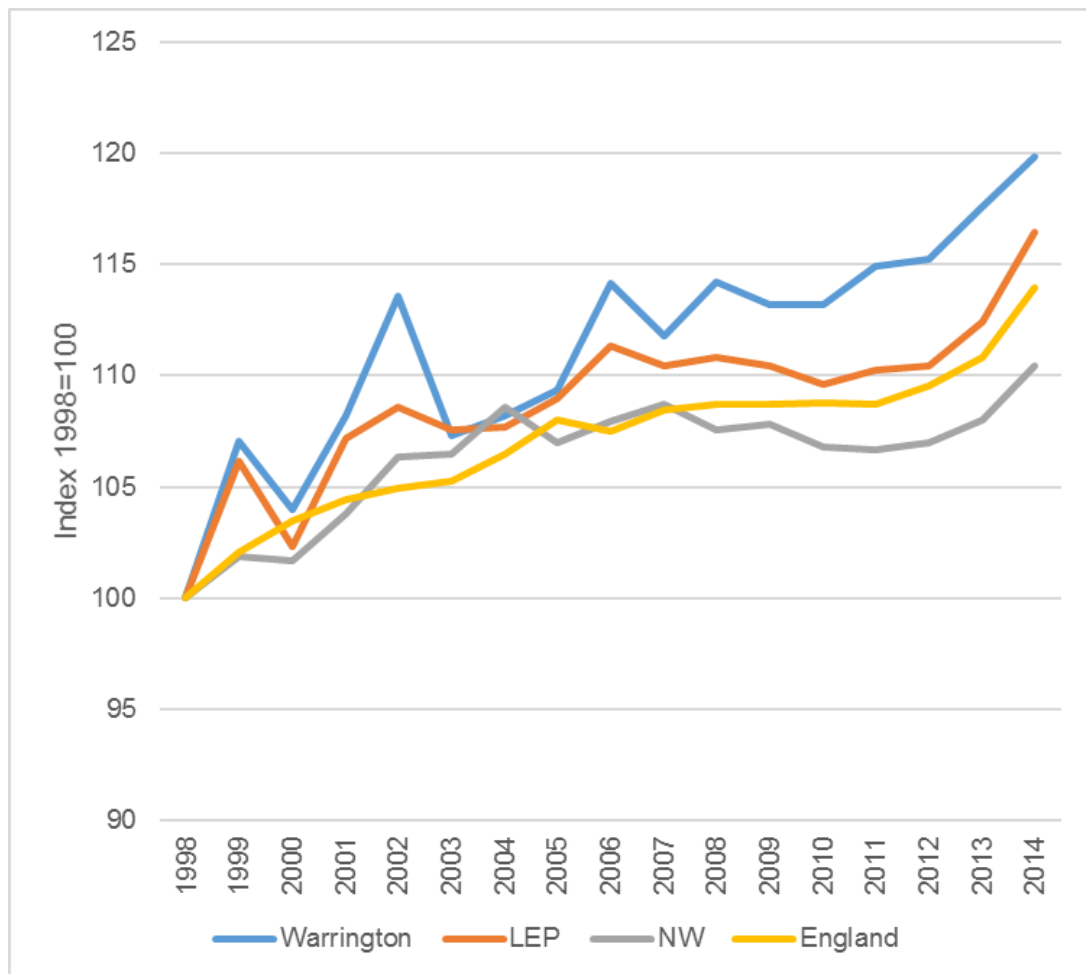
3.17 Warrington has generated significant employment growth in the period 1998-2014 (the period over which employment data is readily available). During this period its employment generation rate has outstripped that of the LEP area, the region or the national average (England). The result was that over 1998-2014, Warrington's workforce grew from 101,000 to 122,000, a rise of some 21 percent (see Figure 5). In the same period Employment growth in England was 14 percent and the North West managed just 10 percent growth.

3.18 The graph shows that employment levels were apparently volatile in the period pre 2008 and since 2010 growth has been steady. However, such volatility is also likely to reflect survey/data issues over the smaller geographic area. Despite the variability the growth trend appears to be clear.

3.19 At the broad sector level, separating those sectors that experienced employment growth and decline both before and after the recession of 2008 examines whether there are any long term trends taking place and whether the structure of the economy was changed by the financial crisis and the subsequent recession (see Figures 6 and 7).

3.20 The largest increase in employment pre-recession was recorded by the public sector. In the period 1998-2008 the public sector added some 10,400 jobs. Separate BRES data (not shown in Figure 7) shows a subsequent decline in public sector employment of 2800 in the period 2009-2014. In 2014 the total public sector employment in Warrington was 18,200. Despite these apparently large changes over the last 18 years, Warrington remains less reliant on public sector employment than England as a whole. In 2014, public sector employment in Warrington was 15 percent of the workforce against 17 percent across England.

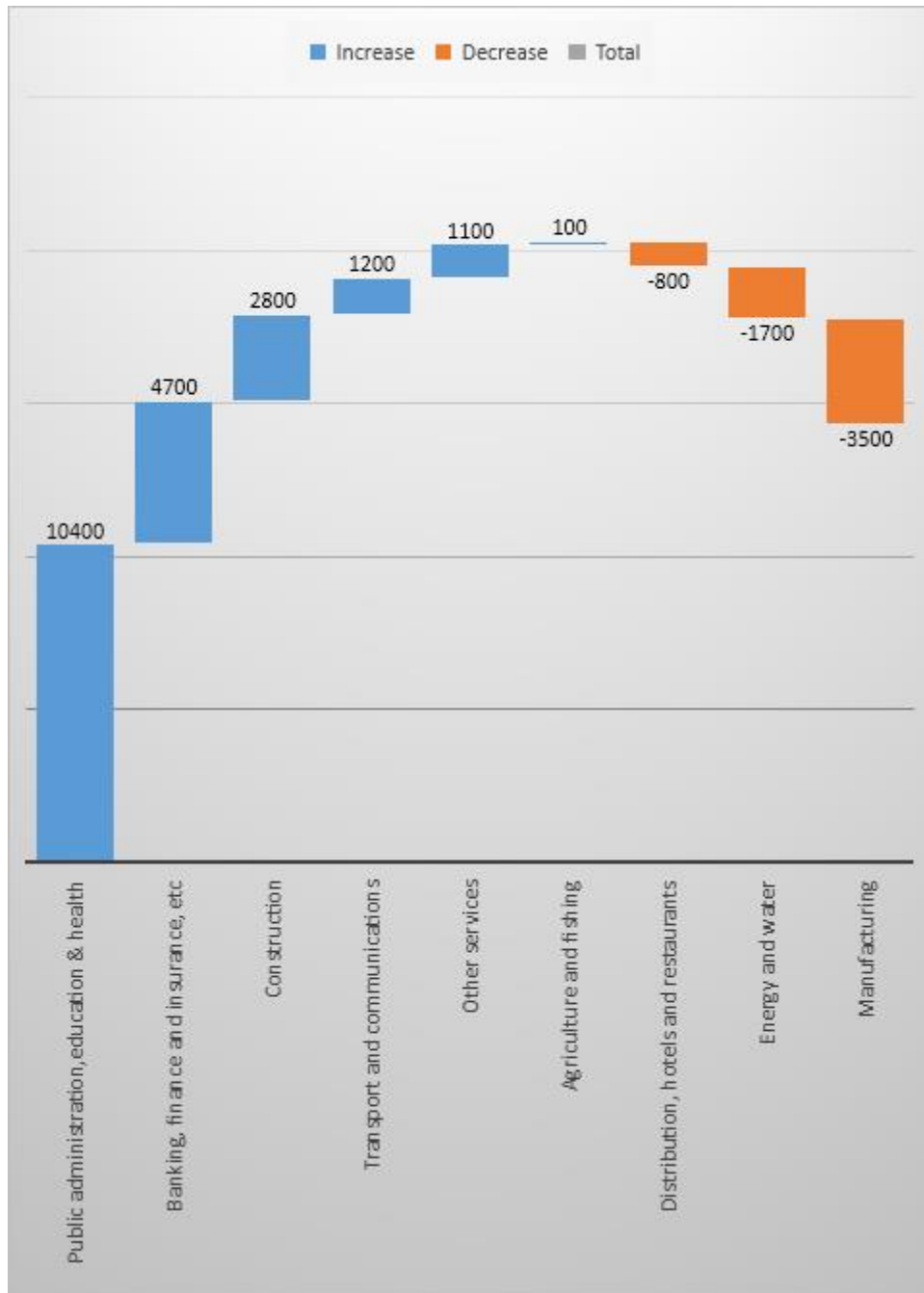
Figure 5 – Employment Change 1998-2014



Source: Annual Business Enquiry/BRES

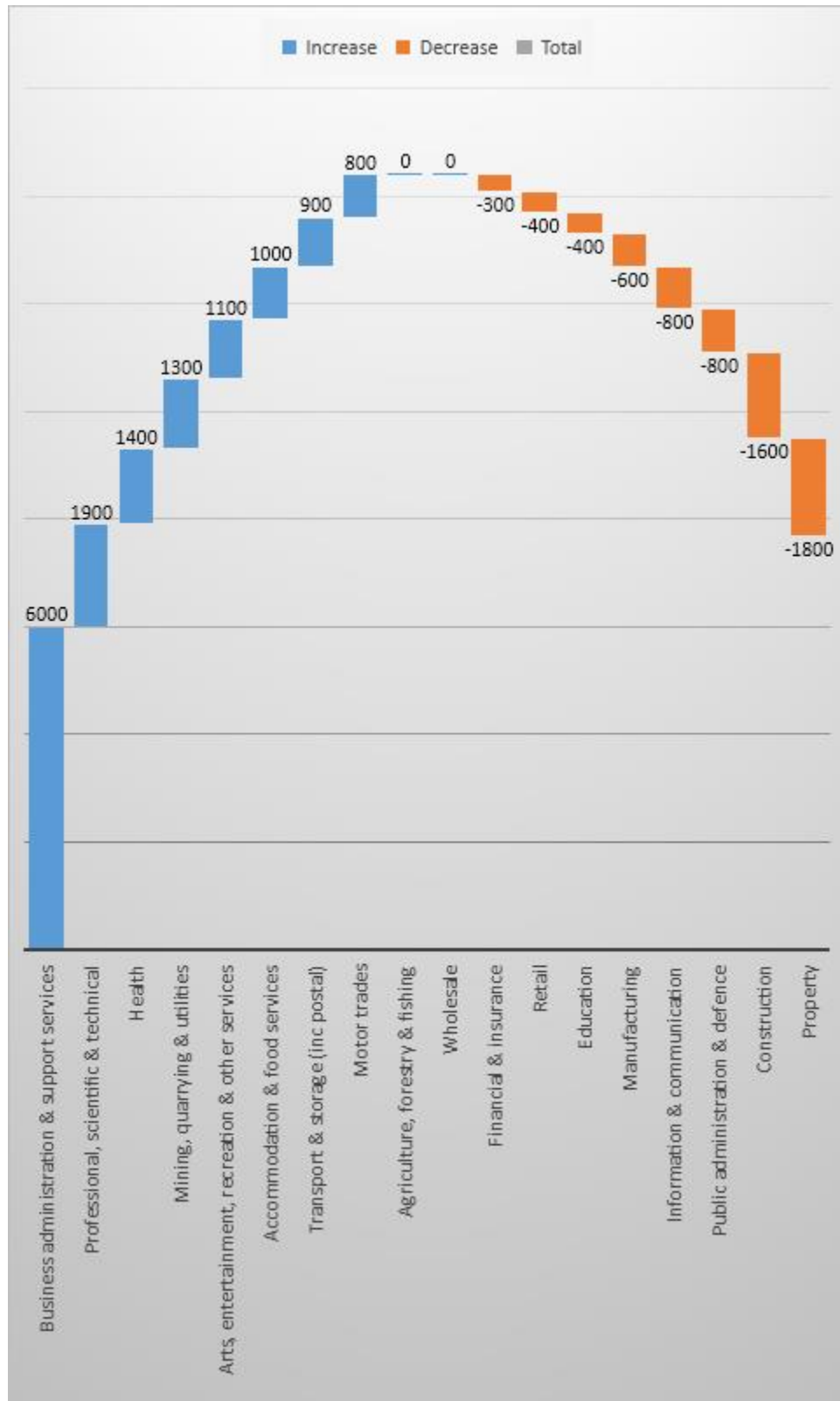
- 3.21 Pre-recession, banking and construction grew but they have declined post-recession. Property employment has shrunk by the largest amount post-recession.
- 3.22 The sector that has seen growth during both of the periods is transport and logistics whereas the sector that declined across both periods is manufacturing. Transport employment has risen by over 2,000 jobs in the period and manufacturing has lost more than 4,000 jobs.

Figure 6 – Changes in Employment Pre-recession (1998-2008)



Source: ABI

Figure 7 – Changes in employment post-recession (2009-2014)

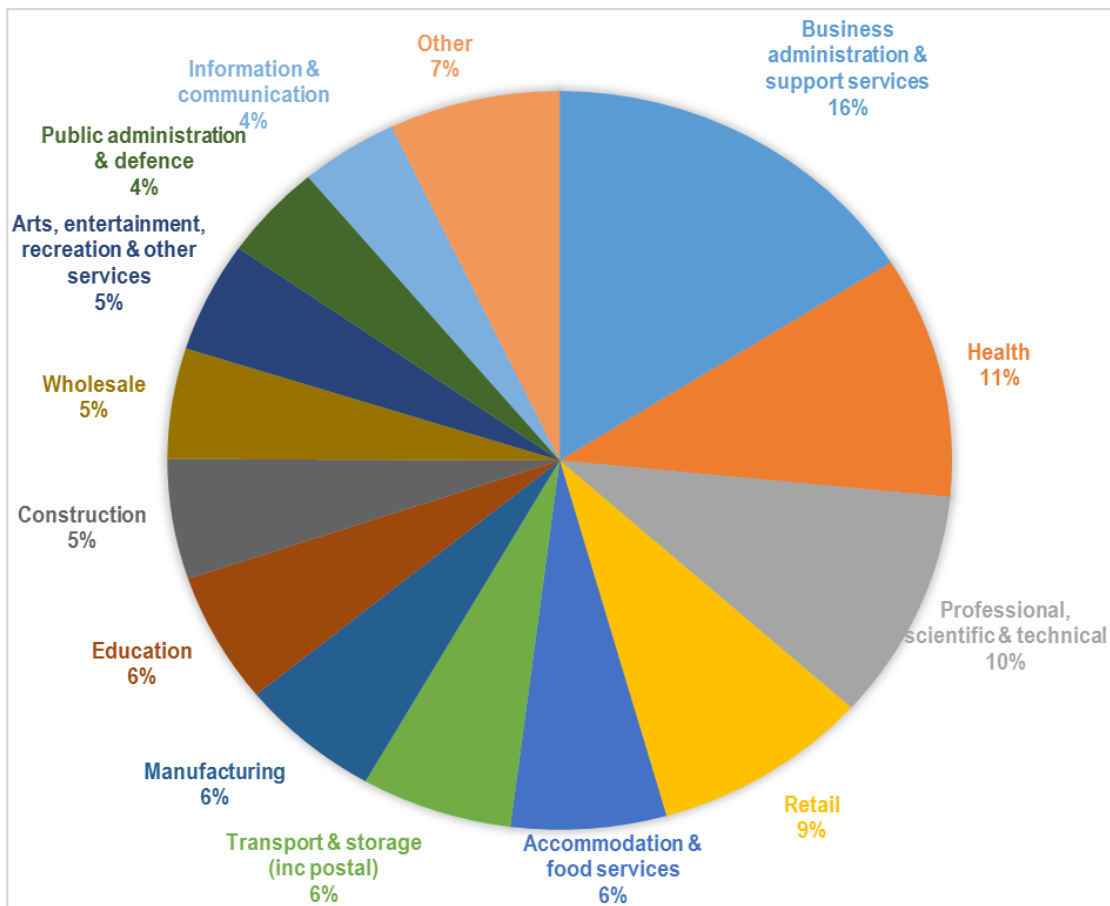


Source: BRES, 2014

Current Sectoral Composition

3.23 In 2014, BRES data indicated that there were some 122,400 in employment in Warrington (see Figure 8). Unlike many other local authority areas in England, the largest employment sector is not health, education or retail but business administration with 16 percent of the total.

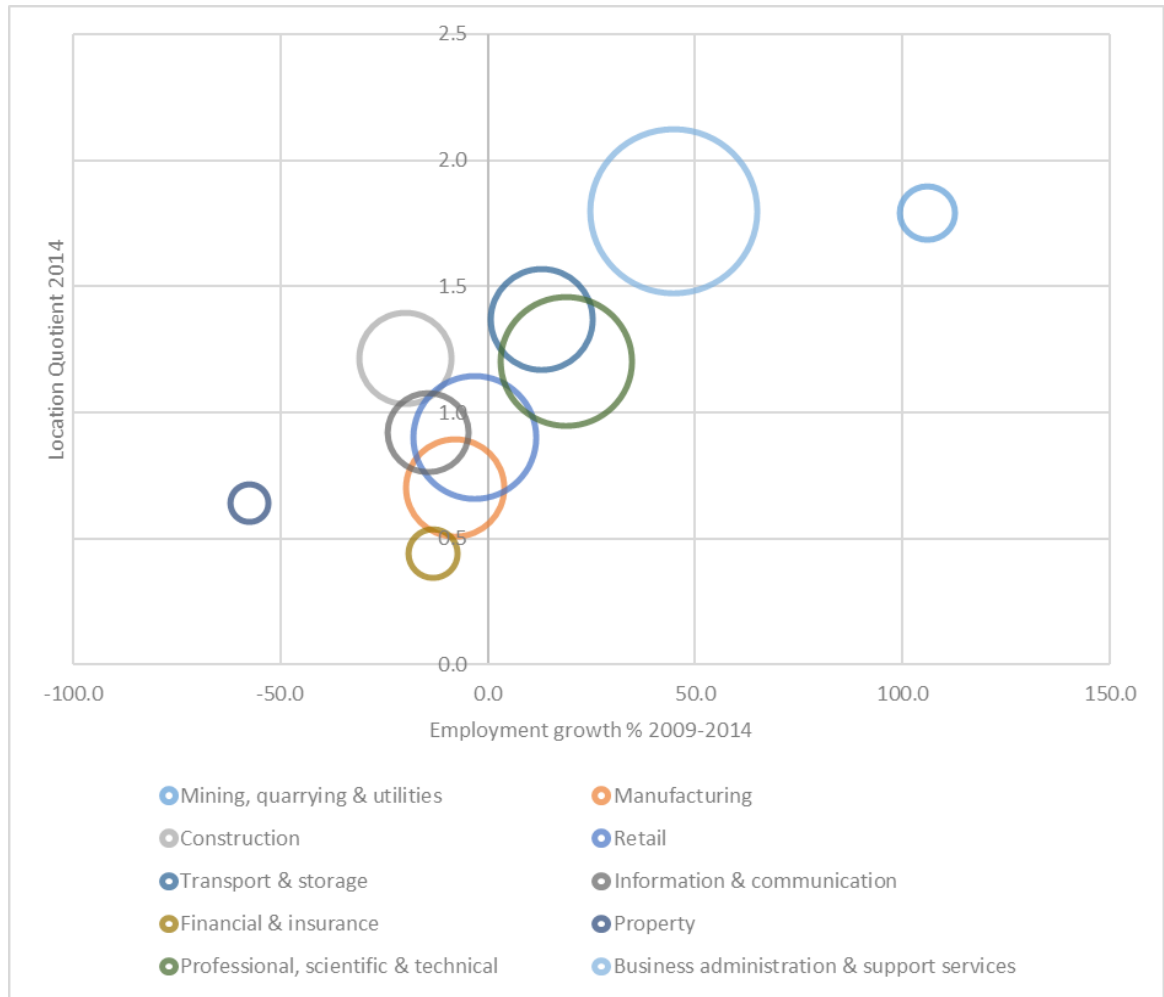
Figure 8 – BRES Employment Breakdown, Percent



Source: BRES, 2014

3.24 Figure 9 and Figure 10 use Location Quotients (LQs) to consider how sectoral employment in Warrington differs from the English average. A LQ of one indicates that the proportion of employment is the same as the English average and a LQ of two shows a proportion double the national average. The graph maps the LQ against the growth of employment in the sector whilst the size of the circle indicates the total size of employment. The two Figures are the same graph but shown as two figures to prevent the number of sectors cluttering the chart.

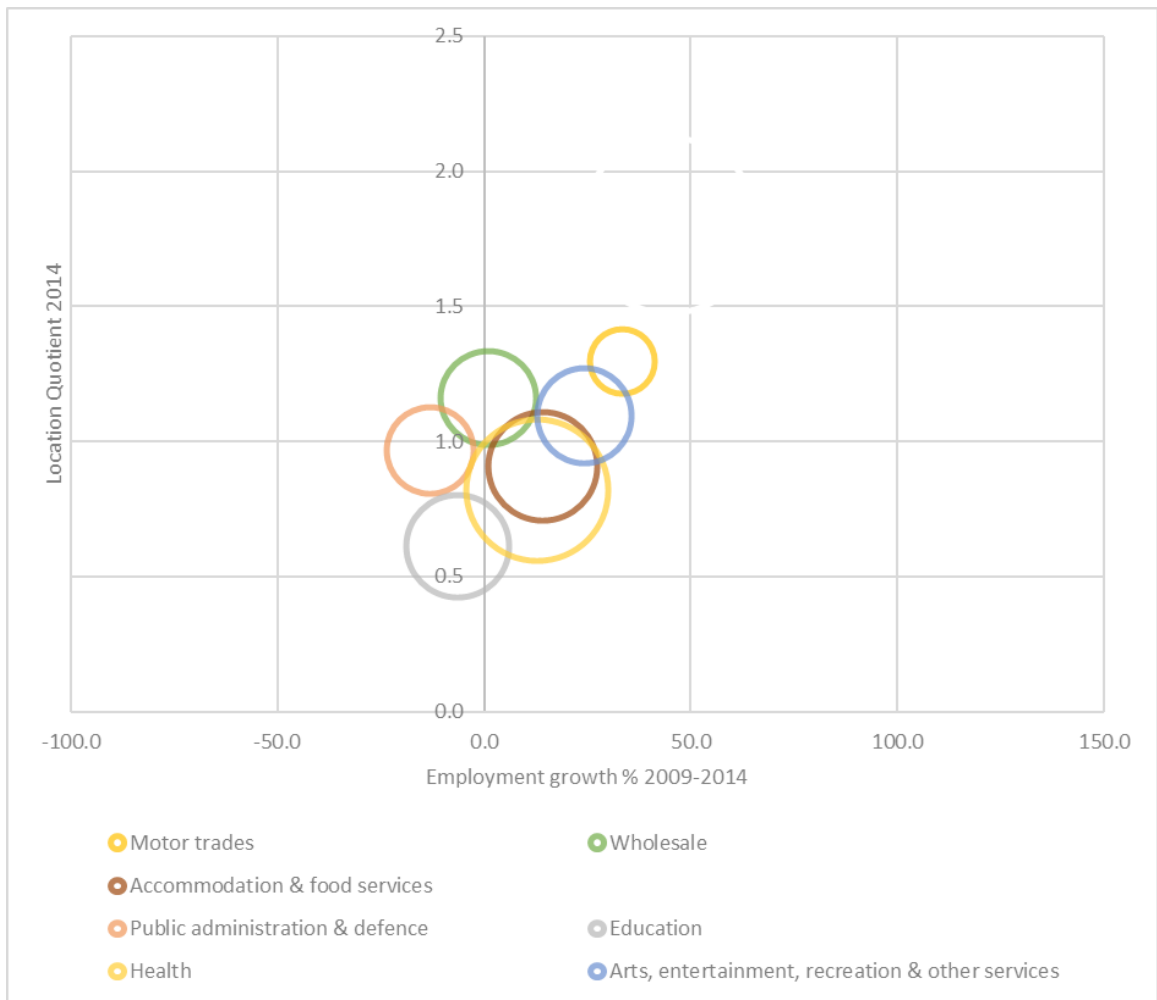
Figure 9 – Location Quotients vs Growth One



Source: BRES, 2014

- 3.25 The graph clearly shows the importance of utilities, business services, professional and technical and transport. Each have grown in the last five years and each are ‘over-represented’ in Warrington. Business administration and support services is also the largest absolute employer. Warrington has also a strong motor trade sector.
- 3.26 The declining sectors are also picked up by the data. Construction has a LQ above one, is a reasonably large employer but is in decline, manufacturing has a LQ below one and is declining and property has declined the most rapidly but is a relatively small employer.

Figure 10 – Location Quotients vs Growth Two



Source: BRES, 2014

3.27 Table 9 presents the same data in tabular form.

Table 9 – Major Sectors Location Quotients and growth 2009-2014

	LQ	Growth, percent	Employment
Mining, quarrying and utilities	1.8	106.0	2,400
Manufacturing	0.7	-7.9	7,100
Construction	1.2	-19.9	6,400
Motor trades	1.3	33.4	2,900
Wholesale	1.2	1.0	6,000
Retail	0.9	-3.1	11,000
Transport and storage	1.4	13.0	7,600
Accommodation and food services	0.9	14.1	7,800
Information and communication	0.9	-14.5	4,900
Financial and insurance	0.4	-13.2	2,000

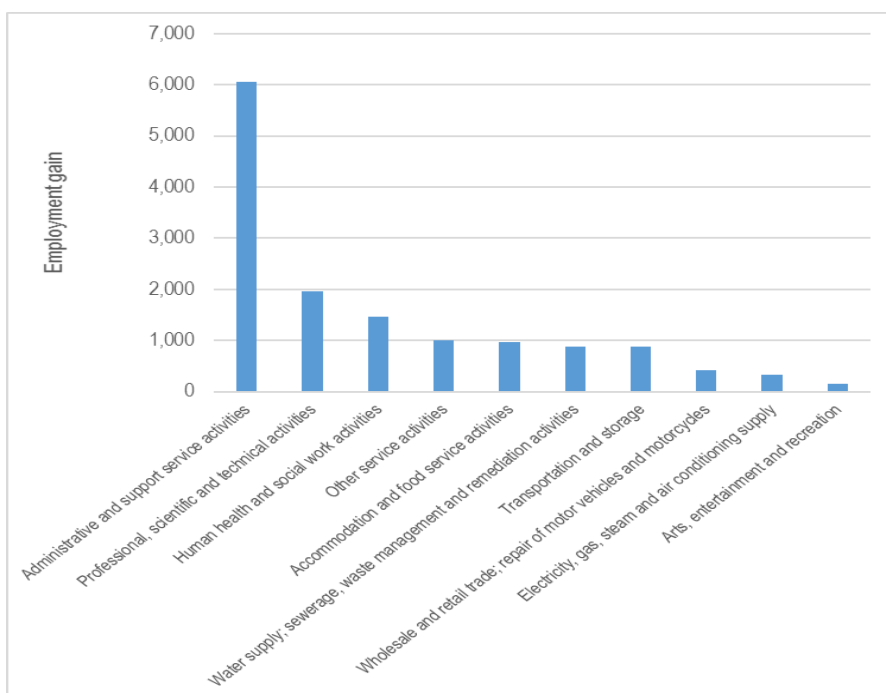
	LQ	Growth, percent	Employment
Property	0.6	-57.4	1,300
Professional, scientific and technical	1.2	19.0	12,300
Business administration and support services	1.8	44.9	19,600
Public administration and defence	1.0	-13.1	5,100
Education	0.6	-6.3	7,000
Health	0.8	12.8	13,000
Arts, entertainment, recreation and other services	1.1	24.2	6,000
Total			122,400

Source: BRES, 2014

Detailed Sector Analysis

3.28 When measured at a more detailed level, consideration of BRES data shows that by far the largest growth was in administrative and support services (see Figure 11). This data captures those firms who provide agency staff across a variety of sectors and does not tell us which sectors are actually seeking local labour through agencies. However, it does demonstrate the changing nature of the local workplace with more companies out-sourcing recruitment and using agencies to manage the terms and conditions of staff.

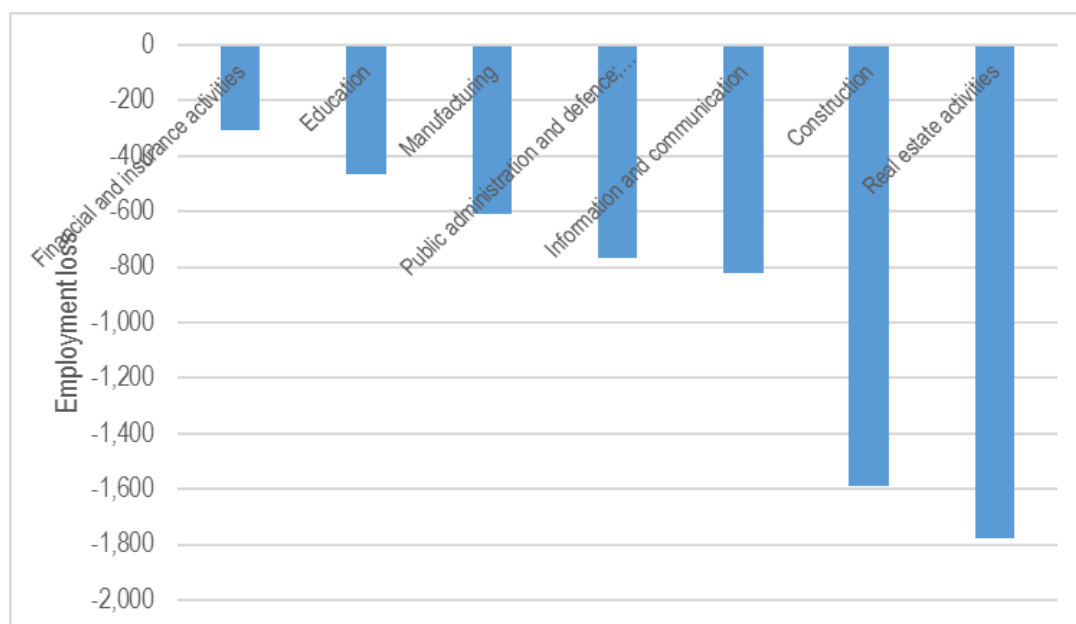
Figure 11 – Detailed Sector Change 2009-2014 – Sectors which saw Employment Increase



Source: BRES, 2014

3.29 Figure 12 sets out those sectors which have declined using the more detailed definitions. This shows a strong decline in real estate but also a decline in information and communication, specialist construction as well as the public sector, excluding health.

Figure 12 – Detailed Sector Change 2009-2014



Source: BRES, 2014

3.30 Data on the ten largest and ten highest represented sub-sectors reinforces the points made above (Table 10).

Table 10 – Sub-Sector Analysis

10 Largest Sub Sectors			10 Highest Represented Sectors		
	No.	LQ		No.	LQ
Retail	11,000	0.9	Computer repair	900	4.1
Employment and Agency	8,600	2.1	Postal and courier	2,700	2.7
Health	7,100	0.8	Waste collection	1,300	2.6
Food and drink service	7,000	1.0	Gambling and betting	1,000	2.5
Education	7,000	0.6	Architecture and Engineering	4,500	2.2
Wholesale	5,900	1.2	Electricity and gas supply	900	2.1
Building services	5,700	2.0	Employment and Agency	8,600	2.1
Public admin	5,100	1.0	Installation and repair of machinery	900	2.0

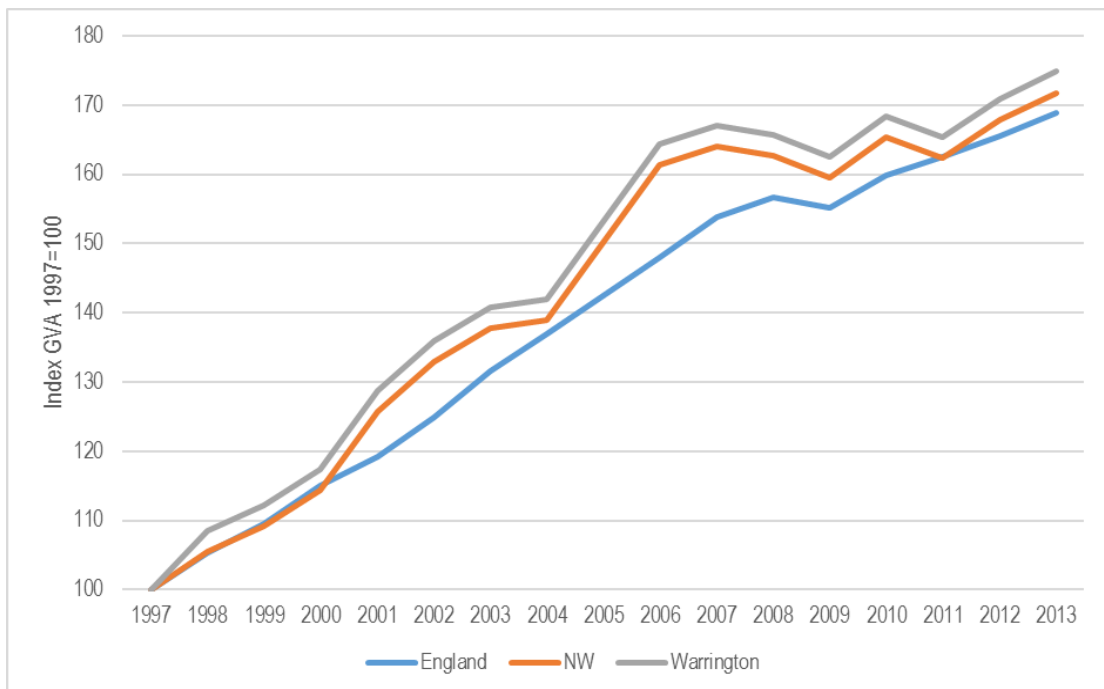
10 Largest Sub Sectors			10 Highest Represented Sectors		
	No.	LQ		No.	LQ
Architecture and Engineering	4,500	2.2	Building services	5,700	2.0
Specialist construction	3,800	1.4	Manufacture of chemicals	800	1.8

Source: BRES, 2014

Gross Value Added (GVA)

3.31 In 2013, Warrington generated £5.9 billion of GVA and the performance of the area since 1997 is set out in Figure 13. During this period both the North West and Warrington have outperformed England in terms of GVA growth. The Warrington economy was three quarters larger, in terms of GVA, in 2013 than it was in 1997. By GVA, Warrington makes up a quarter of the LEP economy.

Figure 13 – GVA Growth indices (1997=100)



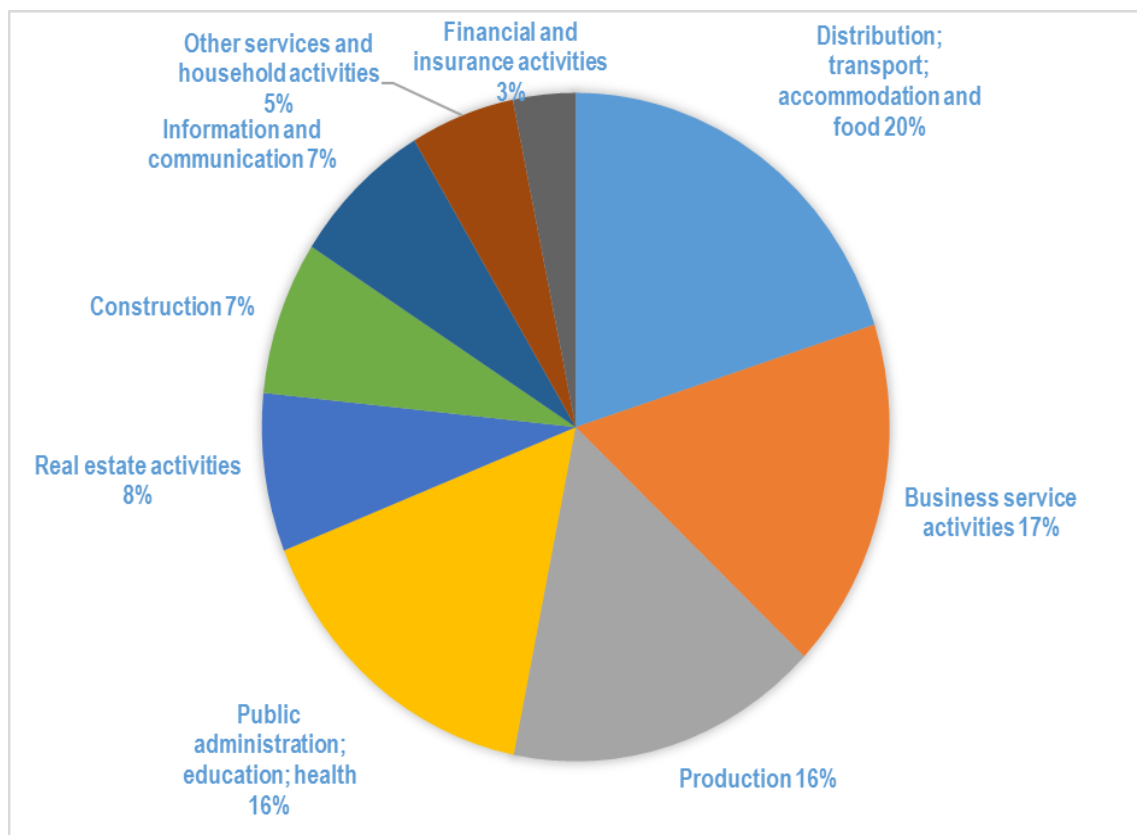
Source: ONS Annual Regional Accounts, 2013

3.32 The breakdown of the sectors which make up the total GVA for Warrington is shown in Figure 14. Key points to note are that:

- Warrington generated the largest proportion of its economy from distribution, transport, accommodation and food (20 percent). This is the second largest sector for England as a whole in terms of GVA, marginally behind public administration education and health, at 18 percent.

- Public administration education and health in Warrington accounted for 16 percent of the economy compared to nearly 19 percent in England.
- The Warrington economy is slightly more polarised in its activities than England – the largest four sectors in Warrington accounted for 69 percent of GVA whilst across England the figure is 62 percent.
- It follows that the remaining 5 sectors generate a relatively low level of GVA. Warrington has a notably small financial and insurance sector. This generated just 3 percent of the local economy compared to 8 percent across England.

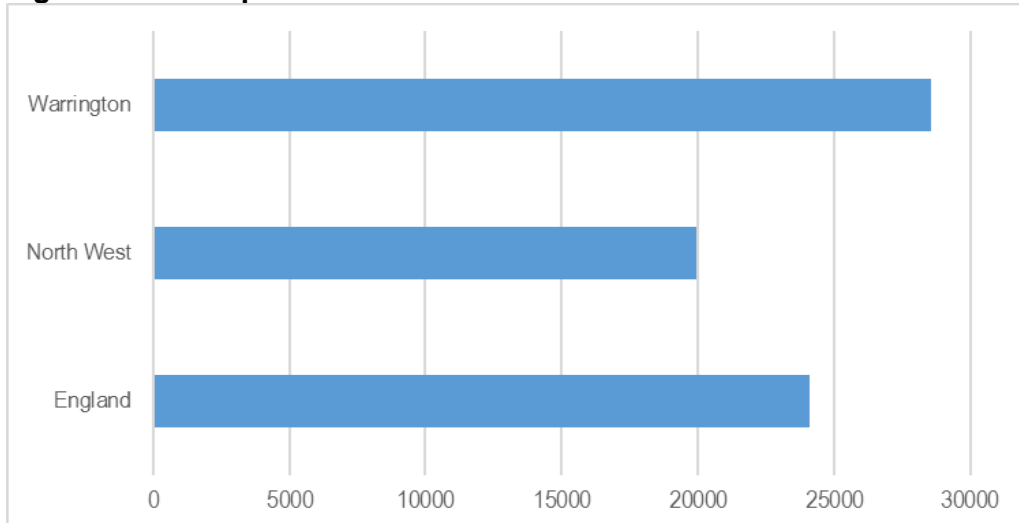
Figure 14 – Breakdown of Warrington GVA by broad sector 2013



Source: ONS Annual Regional Accounts, 2013

3.33 When GVA generated is examined on a per worker basis, some measure of productivity can be estimated. In Figure 15 the figures are compared for 2013 and demonstrate that Warrington generates more economic output per worker than the regional or the national averages.

Figure 15 – GVA per head 2013

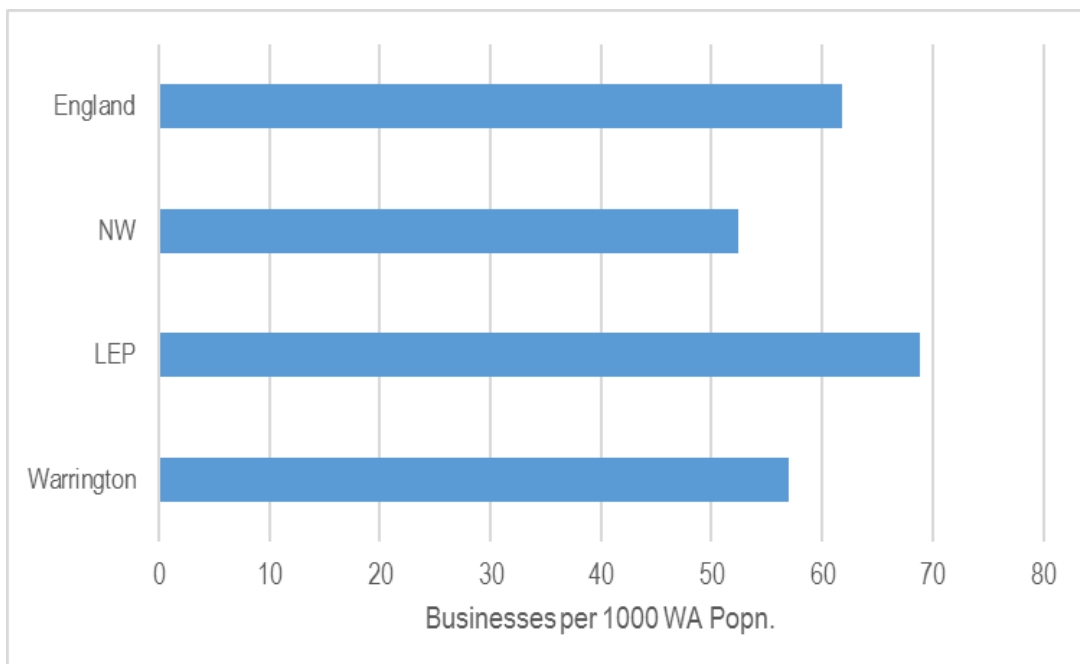


Source: ONS Annual Regional Accounts, 2013

The Business Base

- 3.34 In 2015 there were approximately 7,340 businesses operating in Warrington equating to a business density of 57 per 1,000 working age residents. Whilst out-performing the North West average, this lags the national average of 62 businesses per 1,000 working age residents and the LEP average of 69 (see Figure 16).

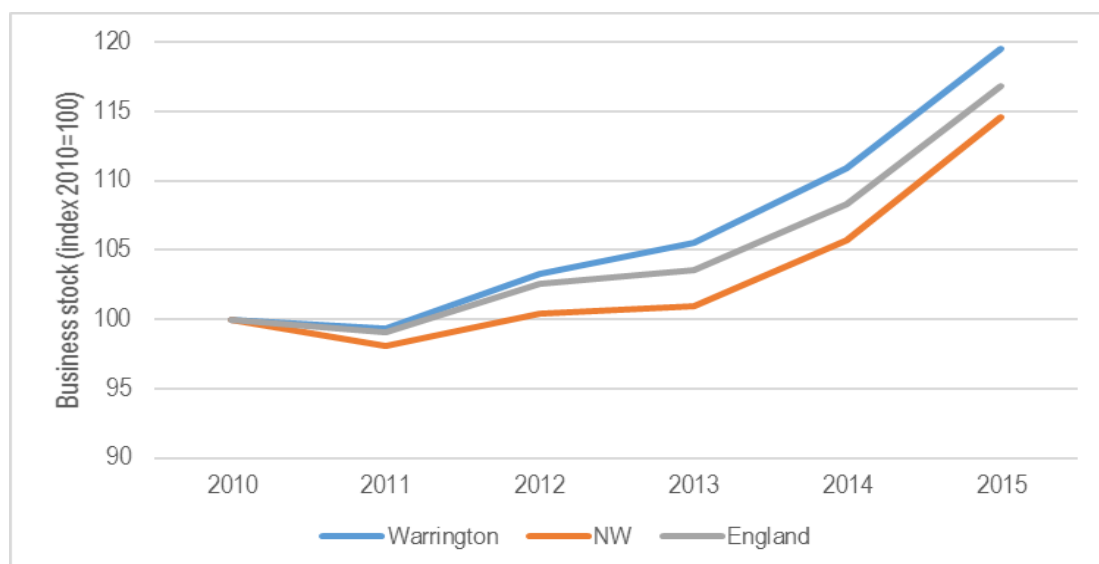
Figure 16 – Businesses per 1,000 people – working age population 2015



Source: UK Business Count & Annual Population Survey, 2015

3.35 The overall local stock of businesses has been increasing over time and in Warrington the recorded growth was 20 percent over the last five years (Figure 17). This growth in the number of businesses has outperformed the England rate of 17 percent growth over the same period.

Figure 17 – Growth in Business Stock (index)



Source: UK Business Count, 2013

Size of the Business Base

3.56 88.8 percent of businesses in England employ less than ten people (micro businesses), and overall 98.0 percent of all businesses are classified as small (up to 49 employees). Warrington, generally follows this broader trend. As Table 11 shows, 97.6 percent of businesses in Warrington employ less than 50 employees, while the proportion employing less than ten is 87.7 percent. 40 local businesses are identified as having more than 100 employees.

Table 11 – Business by Size Band 2015

Employees	Warrington		North West	England
	Count	Percent	Percent	Percent
Micro (1-10)	6,440	87.7	87.8	88.8
Small (11-49)	725	9.9	10.1	9.2
Medium (50-99)	135	1.8	1.7	1.6
Large (100+)	40	0.5	0.4	0.4
Total	7,340			

Source: UK Business Count, 2015

Summary

- 3.57 Warrington has a growing population both through natural factors but also through its ability to attract residents from other UK Local Authorities, along with some international migration. The town has a smaller proportion of people aged over 60 than the national average but it does demonstrate a 'new town demographic' where many of the original residents attracted to Warrington in the 1970s are now approaching retirement age.
- 3.58 The working age population records high levels of economic activity compared to the national average and overall employment levels in the town have also grown faster than the national average.
- 3.59 Employment is more likely to be with an employer rather than through self-employment. Warrington records lower levels of self-employment, working from home and total stock of businesses per 1,000 working age people than across England as a whole – but in the last five years the number of new businesses in Warrington has grown faster than the national average.
- 3.61 Warrington residents are more likely to have a degree than across England, and perhaps as a consequence are also more likely to be employed in the higher Standard Occupational Classifications.
- 3.62 The average Warrington resident earns more than the average Warrington worker. One apparent trend driving this being the commuting of the most senior people in Warrington into highly paid jobs in Manchester.
- 3.63 The Warrington economy has performed strongly over when a 15-year perspective is taken and GVA performance has outstripped the national average. The Warrington economy also generates more GVA per head than the average for England.
- 3.64 Those industries which are represented in Warrington to a greater extent than England, and have also generated growth, are business services, utilities, professional scientific and technical as well as transport. Transport is a sector that has demonstrated consistent growth over many years in Warrington whereas manufacturing has been equally consistent in its declining levels of employment.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This section begins our consideration of the demand for land and property in Warrington. It first provides some brief comments on national and regional market trends which will impact on the local demand for land and premises. The local market is assessed through a quantitative review of property enquiries, deals done and the local supply of vacant premises alongside up to date market intelligence derived from consultations with a range of developers, scheme managers and property agents.

National and Regional Property Markets

- 4.2 Some brief comments on the wider market are first provided below, informed by recent national and regional research.

Industrial Market

- The national and regional picture is one of improving demand against a reducing stock of premises. There is a dearth of good quality existing buildings in prime locations, particularly for sub-1,000 sqm units and 'mid box' options of 5,000-10,000 sqm (Lambert Smith Hampton, 2016)
- Improving demand, combined with renewed interest from pension funds and larger national investors meant a return for speculative development in 2015. As of February 2016, some 1.07 million sqm of speculative space was under construction, although development levels are still at less than half the 2009 peak (Jones Lang LaSalle, 2016). High quality development remains focused on properties of 5,000 sqm or larger, alongside logistics options, with the Midlands and Greater London seeing the strongest supply improvement. Outside of logistics, the North West's supply has seen only modest change to date while supply elsewhere has continued to contract
- In terms of leasehold schemes, increased demand, relative to supply has led to upward pressure on rental values in many areas. Average secondary rental growth across the North West was 13 percent in 2015, with uplift in the Liverpool City Region (Knight Frank, 2016)
- At the start-up and micro business level, companies still want flexible terms and short lease lengths reflecting their inability to predict the longer-term future for their company
- Owner occupiers are becoming more prevalent with the increase in business confidence encouraging firms to expand and review their occupational requirements. This is leading to greatly strengthened freehold demand, but local markets frequently lack the freehold stock to meet needs.
- This may encourage firms to relocate from areas with limited options for owner occupancy, once those businesses reach a certain stage of maturity. However, this is dependent on the nature of the business. For example, high value and high technology sectors will require a high grade of space which can only be found in certain locations.

Warehouse Market

- Growth prospects for the warehouse/distribution property market remain good although overall demand over 2015 was lower than in 2014. Nationally, occupier take up of Grade A industrial and logistics floorspace totalled some 800,000 sqm in the second half of 2015, slightly improved on the first half of 2015 but over a third lower than in the second half of 2014. The North West had an 18 percent share of take up in 2015, some 145,000 sqm (Jones Lang LaSalle, 2016)
- The B8 market remains dominated by retailers, who accounted for 46 percent of all take up at the larger end of the market in 2015. Logistics companies accounted for 30 percent of take-up in 2015, some 470,000 sqm, the highest level of recorded demand since 2008. This growth is fuelled by increasing outsourcing of logistics by retailers, notably for online fulfilment (Jones Lang LaSalle, 2016)
- Within the North West, established logistics sites such as Omega are nearing capacity, while elsewhere there are few 'oven ready' locations which have completed premises or can deliver options quickly. Across the North West only six units of greater than 10,000 sqm each were under construction as of 31st December 2015, totalling 160,000 sqm (Knight Frank, 2016). Nationally, vacancy rates are only at 6 percent, representing less than 12 months' forward supply at current levels (Jones Lang LaSalle, 2016)
- Despite this lack of currently available space, it is anticipated that take-up will continue to increase steadily throughout the next few years, with the online retail sector remaining a strong driver of growth. Ongoing demand improvement will encourage further development, particularly of speculative space, while constraints on supply will drive further rental growth. Any constraints on growth are likely to come through uncertainty in the investment market, following global stock market falls and the ongoing impact of the EU Referendum decision
- In addition to national and regional distribution facilities, the growth on online retail, with same day/next day delivery commitments, will increase demand for local distribution depots on routes with strong access to major settlements.

Office Market

- Generally, the office market in regional locations in the UK has been more subdued, with a slower recovery from the recession than the industrial or logistics property markets.
- However, 2015 saw strengthening demand. A recent report by Lambert Smith Hampton identifies Manchester as a core market area nationally which, in 2015, saw take up at over 60 percent of the City's 10-year average. There has also been a growing confidence on the part of investors to invest outside of London, although as noted, recent political and market uncertainties may put a break on investment activities in the short and medium term.
- Manchester and Liverpool are benefitting from growth in financial and professional services, while locations such as Warrington and South Manchester are seeing increased demand from a broader range of sectors. In Warrington, dominant sectors include nuclear industries, with a growing prominence in construction and engineering. Warrington, and Birchwood particularly, is also a key North West location for call centre operations although this market has not seen significant growth in recent years
- Nationally, against demand there is a severe lack of available stock, in particular Grade A stock. In the short term, this will mean reduced choice for occupiers, while in the long term it is likely to encourage development. However, the pressures are less intense in Manchester which has a four year forward supply of Grade A space, if pipeline supply is included. Also in Liverpool which has a 3 year existing/pipeline supply. This compares to only a 12-month supply in Newcastle (Lambert Smith Hampton, 2016)
- At present, most office development still requires an element of pre-let or public sector funding to secure a start. However, this may change over 2016, at least for schemes in the strongest locations.
- However, while there is a shortage of high grade space, there remains a significant regional stock of second hand offices. In the short term this stock will actually grow as companies seek to upgrade to better options. A growing market will encourage refurbishments, but it is not clear if increased pressure for office to residential conversions is also likely. Pressure for changes of use is an issue in Warrington Town Centre and indeed 2015 saw one such change of use proposal at Empire Court, Museum Street. It is likely to be less of an issue in Birchwood where most offices are in defined business park locations.

Local Property Market

Public Sector Enquiries

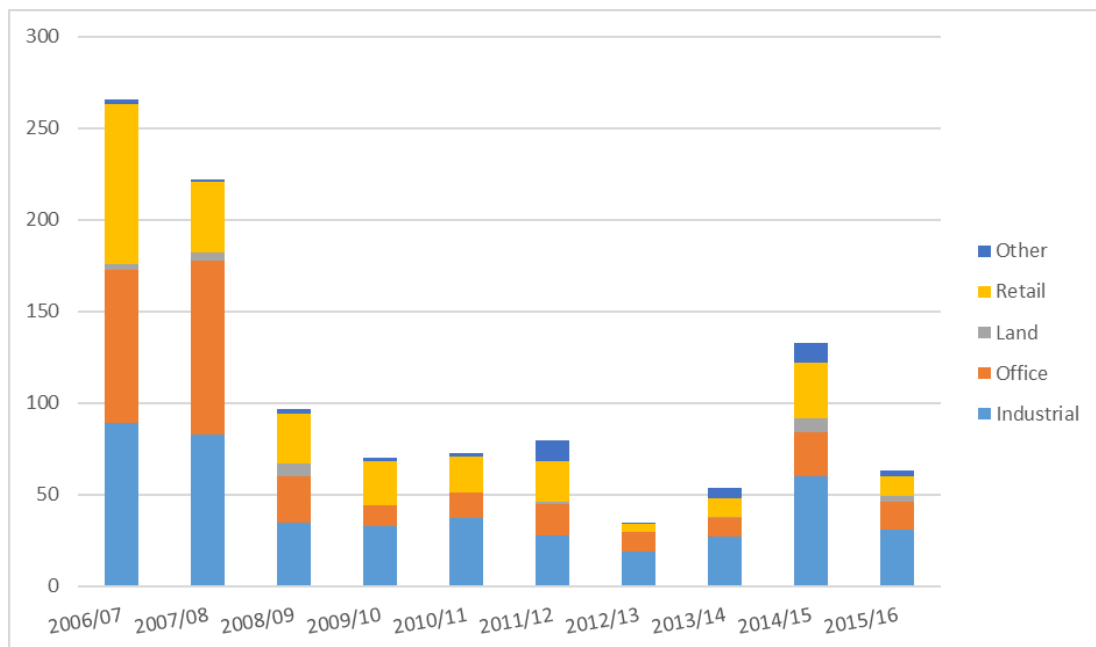
4.3 Enquiries data has been provided by the Council (Warrington and Co.) for 2006 onwards. This data gives no indication of preferred locations and instead categorises enquiries by property type. However, it must be highlighted that due to this form of categorisation, duplication was present where companies had indicated a preference for multiple property types. Where possible this has been corrected, but the data should still be taken as an indicative measure of local demand only. Also, 1093 enquiries represent only a modest sample of the total demand for land and property across the Borough over the last decade.

4.4 Figure 18 sets out a year by year analysis of enquiries by property type for Warrington between 1st June 2006 and 31st May 2016. Over this period 1,093 enquiries were received for the Borough, with industrial premises accounting for 40.4

percent. There were very few land requirements (2.5 percent). Office enquiries account for 28 percent of all enquiries since 2006.

- 4.5 From a peak in 2006/07, enquiries drop sharply from 2008/09 onwards. While the scale of the drop may partly be accounted for by changes in how enquiries are collected and recorded by the Council, the impact of the national recession on industrial and office demand, is still in evidence. Enquiries remained low for all types of property over the recessionary period and reducing to only 35 in 2012/13. Demand has increased after that point, with a recent peak of 133 in 2015/16 and strong improvement in enquiry levels is evident for all types of property.

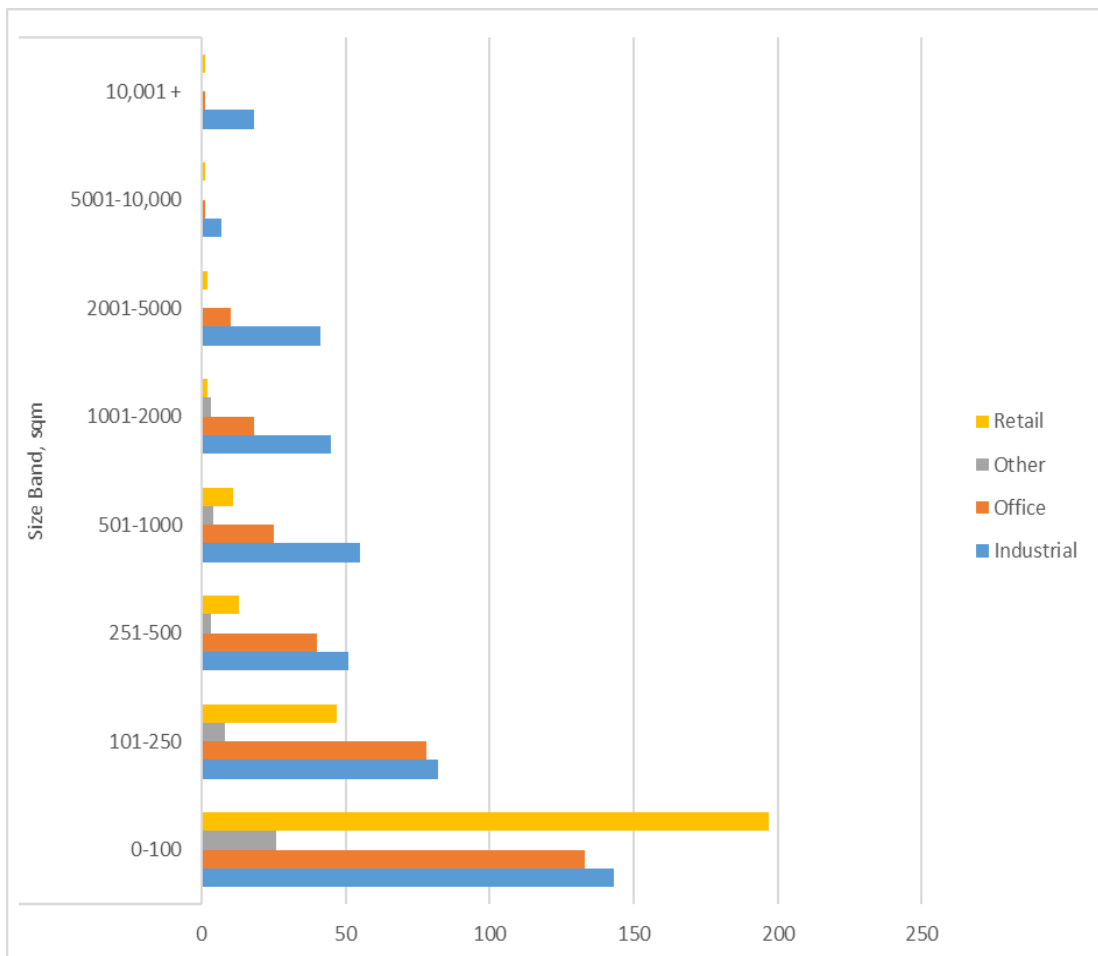
Figure 18 – Council Enquiries 2006-2016, Type



Source: Warrington and Co, 2016

- 4.6 Figure 19 shows that most enquiries, where a preferred size was stated, were for properties at the smaller end of the scale and almost half wanted units of 0-100 sqm. In the industrial sector, there is reasonable evidence of demand for premises up to 5,000 sqm. For offices, the bulk of the demand is for properties up to 2,000 sqm and few sought retail options larger than 100 sqm in size. Few enquired about land, but those that did generally sought plots of less than 2.0 ha.

Figure 19 – Council Enquiries 2006-2016, Sizes

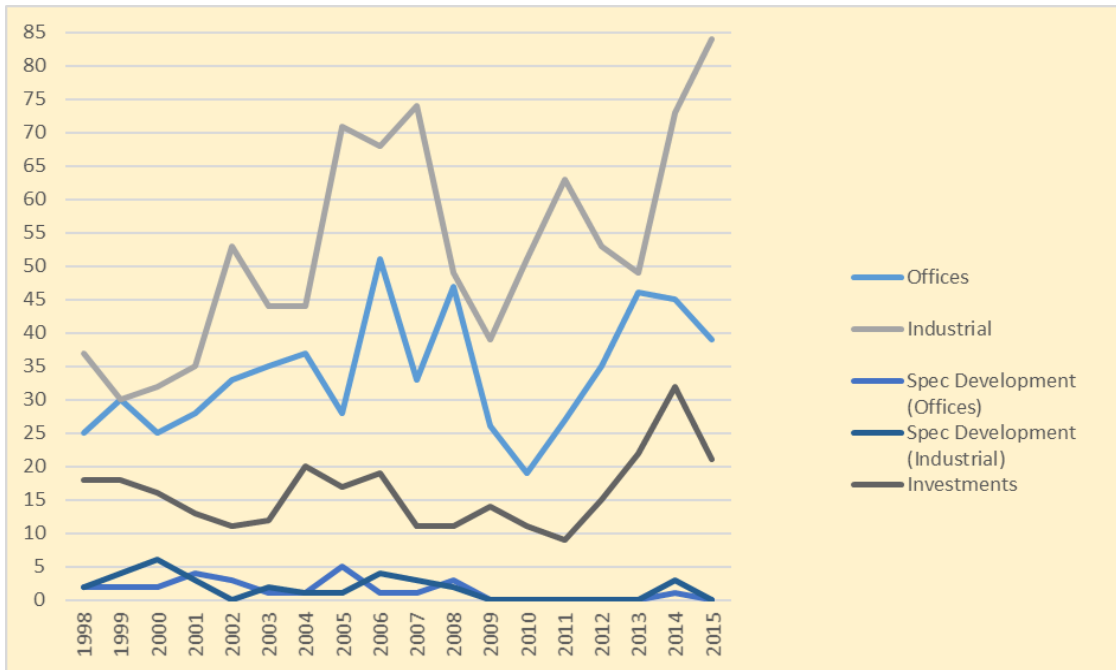


Source: Warrington and Co, 2016

Property Deals

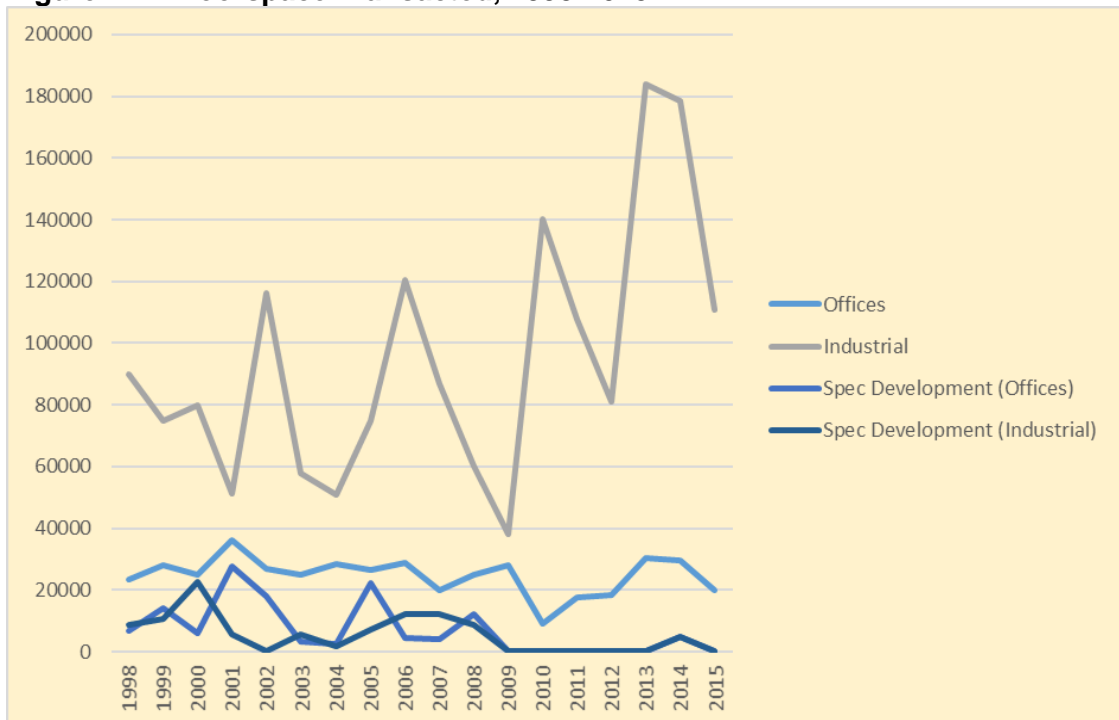
- 4.7 Since 1998 BE Group has researched and written an annual review of Warrington’s economy and property market. This covers investment, industrial, office, retail and residential markets. It records office, industrial and investment deals, of more than 200 sqm, completed in the preceding year. Figure 20 summarises that transaction information, from 1998 to 2015, with data for the latter being recorded in the 2016 Property Review. Figure 21 shows the amount of floorspace being transacted annually, over the same period.

Figure 20 – Number of Deals by Property Type, 1998-2015



Source: BE Group, 2016

Figure 21 – Floorspace Transacted, 1998-2015

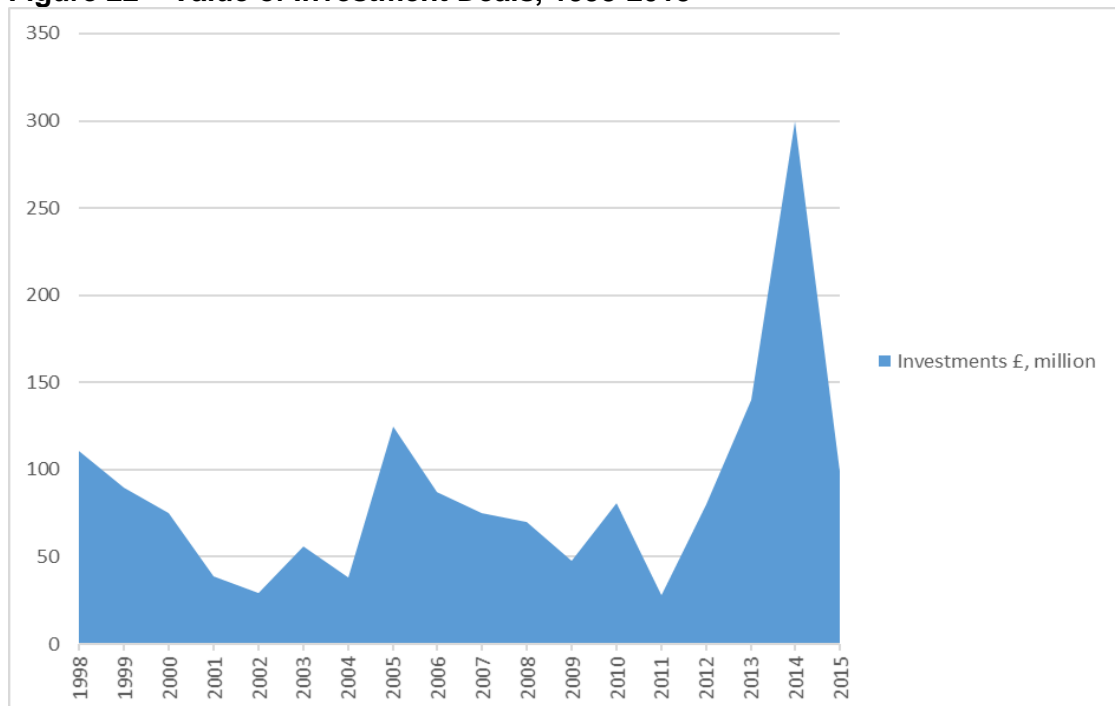


Source: BE Group, 2016

Investment Deals

4.8 There has been a total of 290 investment deals over 1998-2015 in Warrington property, representing £1,570 million of investment value. Figure 22 shows the levels of value achieved on investment deals, annually. Over that 18-year period an average of 16 deals were recorded each year, achieving an average value of around £87 million. There was a noticeable drop in local investment activity over 2007-2011, which reflects the period of national recession. Over that period, only 9-14 deals were recorded annually, achieving an average value of £60.4 million.

Figure 22 – Value of Investment Deals, 1998-2015



Source: BE Group, 2016

4.9 Since 2012, Warrington's investment market has recovered well, with a peak of 32 deals recorded in 2014, generating £300 million in investment value. Market activity in that year included the sale of the Golden Square Shopping Centre, for around £141 million, and the sale of Birchwood Park, as part of a portfolio of three business parks, to an international consortium for £430 million. Annually, most of the transactions related to either office or industrial property investments, while 2014/15 saw strong investment in logistics property, reflecting the UK-wide experience.

Office Deals

4.10 There has been a total of 609 deals on office property since 1998, greater than 200 sqm in size each, comprising 446,746 sqm of space. An average of 34 deals, in

around 25,000 sqm of floorspace, was recorded annually. The proportion of freehold deals within that varied, but in recent years around a quarter of transactions annually were sales. Market activity decreased in the recessionary years 2009-2012, but has recovered well since with the number of deals in 2013/14 approaching pre-recession peaks, and exceeding them, when measured by floorspace.

Industrial Deals

- 4.11 There has been a total of 949 industrial deals over 1998-2015, greater than 200 sqm each, and occupying 1.7 million sqm of space. The average annual transaction rate was 53 deals/year, taking up an average of 95,000 sqm of floorspace each year. On average 15-25 percent are freehold. Deal rates have fluctuated over the 18-year period, with more limited activity over 1998-2001 and to a lesser degree over 2003/04 and 2008/09. Compared to other sectors, the reduction in market activity over the recent national recession was relatively modest.
- 4.12 2015 was the peak year in terms of number of deals done, while 2013 saw the greatest floorspace take-up. Deals are recorded across Warrington although Woolston Grange tends to be most active. In 2015, more than one in four of all the deals reported were within that Employment Area.

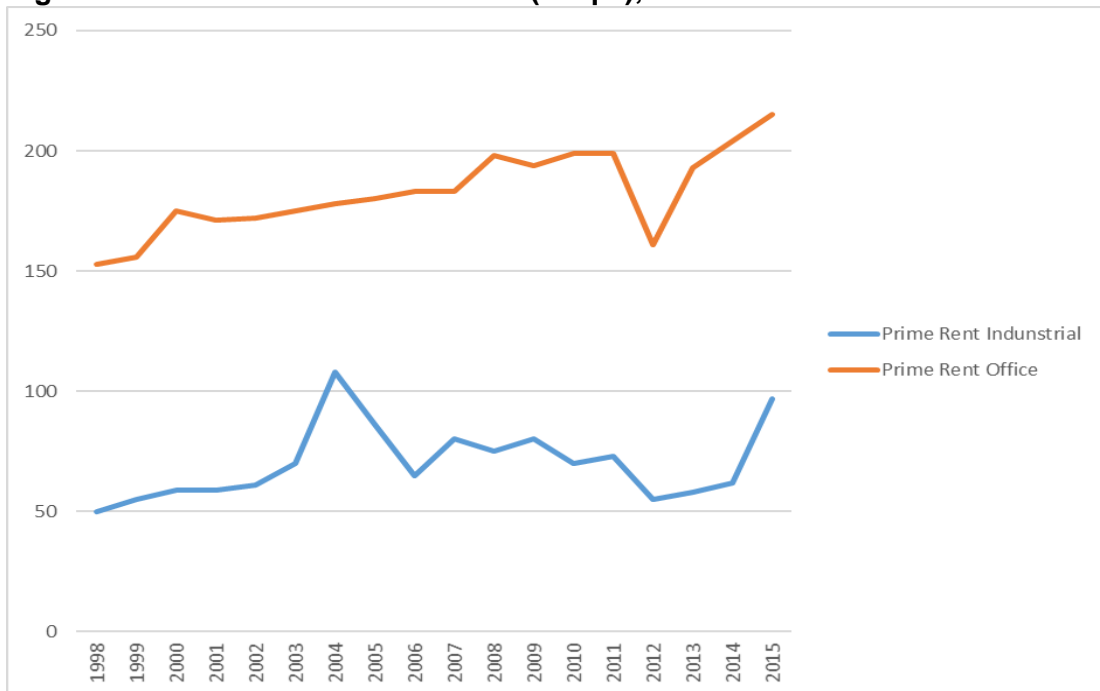
Speculative Deals

- 4.13 Since 2008, speculative activity for both office and industrial property has been largely non-existent. That has begun to change more recently however, with the completion in early 2016 of The Base office scheme in Warrington Town Centre and some speculative delivery of industrial/warehouse units at Birchwood Park (Site 367: The Quadrant (South), Birchwood Park). Deals in these schemes will be recorded in the 2017 Property Review.

Headline Rents

- 4.14 Figure 23 shows the headline rents achieved annually, for Warrington's industrial and office properties. In terms of office rents, the data shows reasonably steady growth from 1998, which saw a headline rate of £153/sqm, to 2010/11 when £199/sqm was achieved. This represents an annual growth rate of some 2.3 percent. 2012 saw headline rates decrease by almost a quarter to £161/sqm. Growth has resumed over 2014/15 with a new peak rent of £215 achieved in 2015 at Bridgewater Place, Birchwood Park in 2015. Across the whole 18-year period the average annual growth rate was 3.4 percent.

Figure 23 – Headline Rents Achieved (£/sqm), 1998-2015



Source: BE Group, 2016

- 4.15 The pattern for industrial prime rents has been more uneven. Steady growth was recorded over 1998-2002, equating to around 2.8 percent a year. However, the subsequent three years saw a spike in prime rental levels, peaking at £108/sqm in 2004. Rents dropped back in 2005/06 and fluctuated between £70-85/sqm over the next five years until, as with offices, a sharp of almost a third was recorded in 2012. Growth returned in 2013 and as of 2015 prime rents appeared to be returning to their 2004 peak, with a headline rate of £97/sqm recorded. The average annual growth rate over this period, for industrial headline rents, was 2.6 percent.

Property Supply

- 4.16 A schedule of the vacant floorspace being marketed in the study area (as of July 2016) has been compiled mainly from physical survey, a search of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although this does not include empty units not currently being marketed. The schedules for industrial (including warehouses and workshops) and offices have been included in Appendix 2.

Industrial

- 4.17 Table 13 shows that there was 82,259 sqm of vacant industrial floorspace in Warrington, within 123 properties. The largest single supply of available floorspace

was in Woolston Grange comprising 23,843 sqm, 29.0 percent of the total, in 25 units. Located in East Warrington, Woolston Grange is the largest single industrial estate in the Borough covering 108.8 ha. However, almost half of the floorspace here was accounted for by a single building, the 11,427 sqm Kingsland123 on Kingsland Grange. This was by far the largest property currently on the market in Warrington and the only one greater than 10,000 sqm in size. It was more than twice the size of the second largest option, a 5,304 sqm premises on Melbury Court in Birchwood.

- 4.18 Combined, Winwick and Woolston contained around half the available units (60) and floorspace (42,394 sqm). Located between Junctions 8-9, M62, Winwick incorporates two major Employment Areas, Winwick Quay and Gemini which between them comprise 177.67 ha of land in B-Class use. They were a particular focus for available units of more than 1000 sqm in size, while Winwick had the largest single offer of 0-500 sqm properties. A further 18.2 percent of the floorspace (14,971 sqm) and 13.0 percent of the units (16) was in Birchwood, focused at Adlington and Prestwood Courts.
- 4.19 Unsurprisingly, there was limited availability in primarily residential parts of Warrington Town such as Orford or locations such as Great Sankey which mostly accommodate large individual occupiers rather than multi-occupancy industrial estates. No availability was recorded in peripheral settlements such as Culcheth or Lymm although four mid-sized units of 1,672-2,272 sqm were on the market in the industrial estates of Appleton Thorn.
- 4.20 There was a supply of 8,139 sqm of floorspace, comprised of 14 premises, in and around Warrington Town Centre. However, this is misleading as 59.0 percent of this supply comprised the 4,805 sqm Dallam One unit on Folly Lane. Other Town Centre units are sub-720 sqm in size.

Table 13 – Amount of Marketed Industrial Property

Area		Size Band, sqm								Total
		0-100	101-300	301-500	501-1,000	1,001-2,000	2,001-5,000	5,001-10,000	10,000+	
Appleton	Floorspace, sqm	-	-	-	-	4,670	2,272	-	-	6,942
	Number of Properties	-	-	-	-	3	1	-	-	4
Bewsey	Floorspace, sqm	76	666	342	-	-	-	-	-	1,084
	Number of Properties	1	5	1	-	-	-	-	-	7
Birchwood	Floorspace, sqm	401	386	423	2,031	4,422	2,004	5,304	-	14,971
	Number of Properties	5	2	1	3	3	1	1	-	16
Burtonwood	Floorspace, sqm	-	-	886	-	-	-	-	-	886
	Number of Properties	-	-	2	-	-	-	-	-	2
Great Sankey	Floorspace, sqm	-	653	-	-	-	-	-	-	653
	Number of Properties	-	3	-	-	-	-	-	-	3
Orford	Floorspace, sqm	-	-	-	553	-	-	-	-	553
	Number of Properties	-	-	-	1	-	-	-	-	1
Risley	Floorspace, sqm	35	186	-	-	-	-	-	-	221
	Number of Properties	1	1	-	-	-	-	-	-	2
Town Centre	Floorspace, sqm	182	752	1,053	1,347	-	4,805	-	-	8,139
	Number of Properties	4	4	3	2	-	1	-	-	14
Westbrook	Floorspace, sqm	-	293	2,739	2,842	-	-	-	-	5,874
	Number of Properties	-	1	7	4	-	-	-	-	12
Wilderspool	Floorspace, sqm	-	124	418	-	-	-	-	-	542
	Number of Properties	-	1	1	-	-	-	-	-	2
Winwick	Floorspace, sqm	355	1,457	3,090	1,020	9,725	2,904	-	-	18,551
	Number of Properties	6	10	8	2	8	1	-	-	35

Area		Size Band, sqm								Total
		0-100	101-300	301-500	501-1,000	1,001-2,000	2,001-5,000	5,001-10,000	10,000+	
Woolston	Floorspace, sqm	337	1,341	1,134	4,184	5,420	-	-	11,427	23,843
	Number of Properties	4	7	3	6	4	-	-	1	25
Total	Floorspace, sqm	1,386	5,858	10,085	11,977	24,237	11,985	5,304	11,427	82,259
	Number of Properties	21	34	26	18	18	4	1	1	123

Source: BE Group, 2016

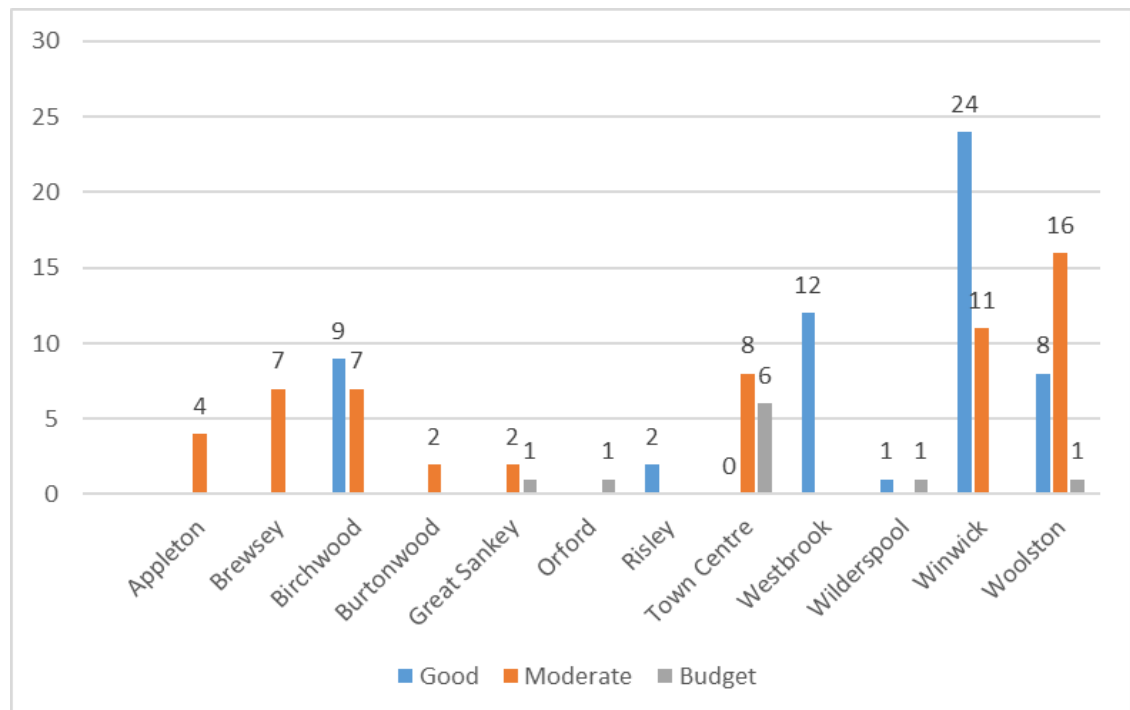
4.21 Building quality is broken down into three category assessments as shown in Table 14, based on the headline rents of the available units. Rental levels provide a good indication of the general quality of a property without a detailed physical inspection. Figure 24 shows that both good and moderate premises each comprised around 46 percent of the available stock. There was a reasonable supply of good quality options at Winwick, Westbrook (where all available units are good quality) and to a lesser degree Birchwood and Woolston. In comparison the offer of budget units was much more limited and focused in, and around, the Warrington Town Centre.

Table 14 – Building Quality Assessment

Type	Quality Assessment – Rental Levels, Sqm		
	Good	Average	Budget
Industrial	>£50	£25-50	<£25
Office	>£150	£50-150	<£50

Source: BE Group 2016

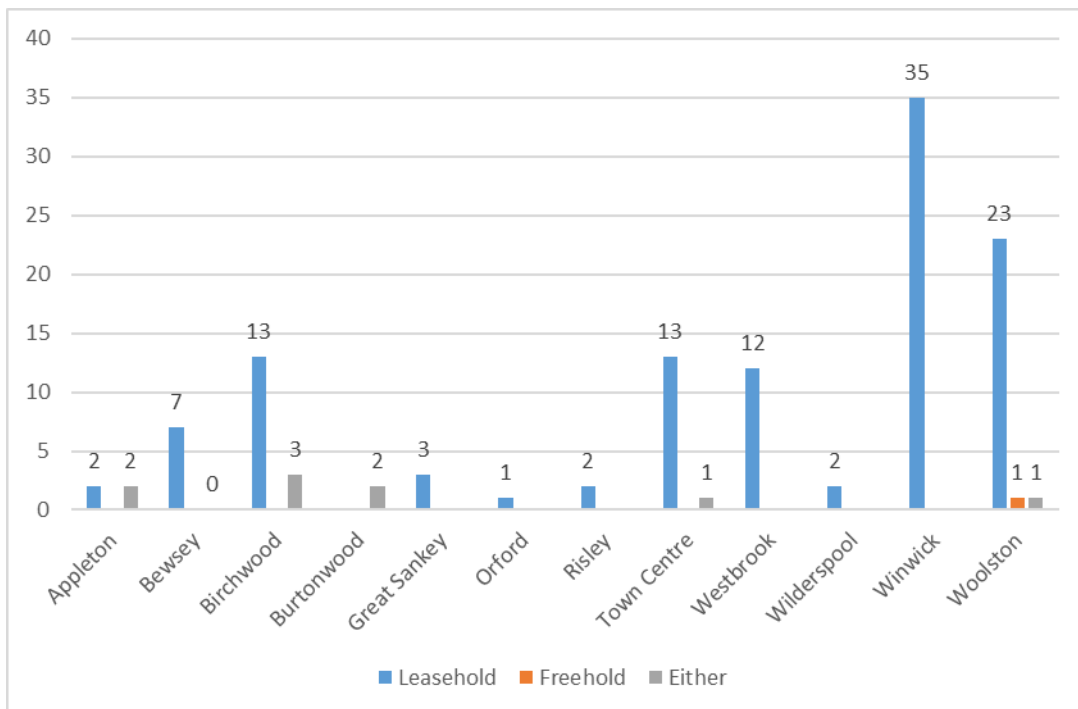
Figure 24 – Quality of Marketed Industrial Property



Source: BE Group, 2016

4.22 Figure 25 below shows that the majority (92 percent) of premises were available on leasehold terms only. There was only one premises available freehold, a 836 sqm premises on Cranford Court in Woolston. A further 9 units, 7 percent of premises were available either to let or purchase.

Figure 25 – Tenure of Marketed Industrial Property



Source: BE Group, 2016

Office

4.23 Table 15 shows that there was 65,738 sqm of vacant office floorspace, comprised of 299 properties. Unsurprisingly, the largest single supply was at Birchwood the Borough’s prime motorway accessible Employment Area, comprising around half the floorspace (32,377 sqm) and a third of the suites (93). Birchwood’s available supply was spread across the size bands, including a relatively strong offer of suites greater than 201 sqm in size. In particular, the area contained five of the six office properties, greater than 1,000 sqm, available. This includes the 5,090 sqm Stanford House, Garrett Field. 17 percent of Birchwood’s vacant space, 5,615 sqm, was within Birchwood Park.

4.24 A third of the floorspace (21,353 sqm) and half of the suites (150) were found in, and around, Warrington Town Centre. The Town Centre offered suites of up to 960 sqm, with the bulk of the availability in the 21-200 sqm range. The Town Centre includes three business centres, Dallam Court, St James’ Court and recently completed, ‘The Base’. At the time of writing, The Base had 53 suites available comprising 3,066 sqm. Collectively these business centres accounted for 24 percent of the total vacant floorspace for the Town Centre and around half (74) of the available suites.

Table 15 – Amount of Marketed Office Property

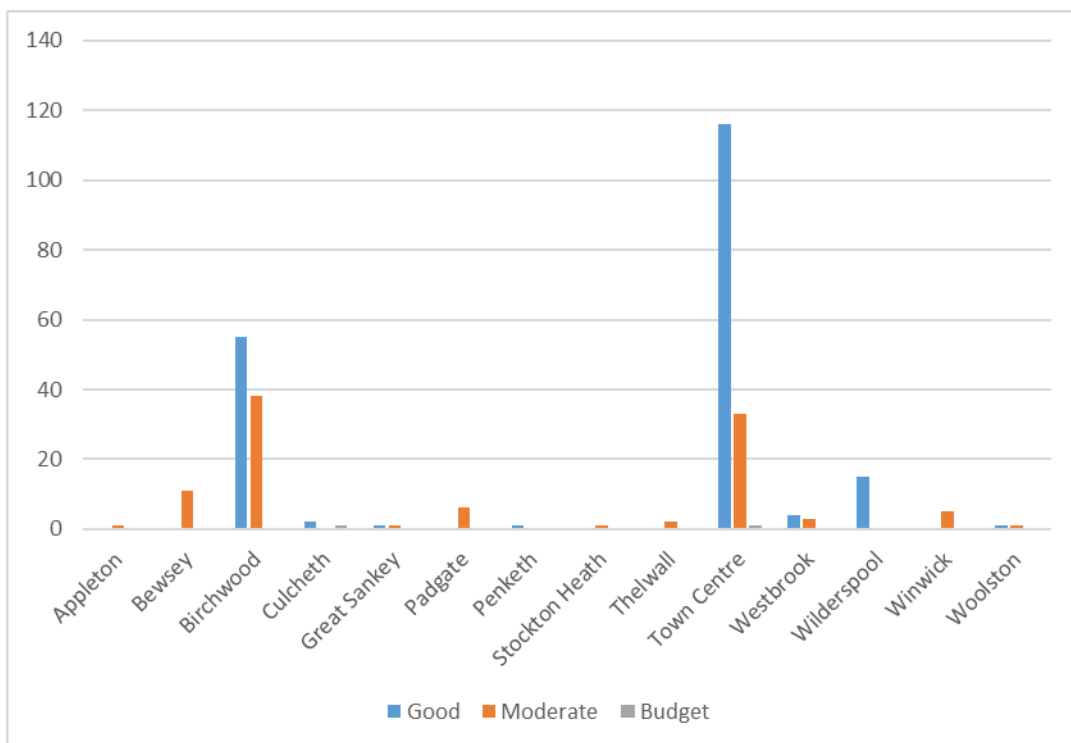
Area		Size Band, sqm						Total	
		0-20	21-50	51-100	101-200	201-500	501-1,000		1,001+
Appleton	Floorspace, sqm	-	-	-	116	-	-	-	116
	Number of Properties	-	-	-	1	-	-	-	1
Bewsey	Floorspace, sqm	118	73	-	-	-	-	-	191
	Number of Properties	9	2	-	-	-	-	-	11
Birchwood	Floorspace, sqm	122	676	1,171	956	7,591	10,425	11,436	32,377
	Number of Properties	12	18	15	7	21	15	5	93
Culcheth	Floorspace, sqm	-	25	135	-	-	-	-	160
	Number of Properties	-	1	2	-	-	-	-	3
Great Sankey	Floorspace, sqm	-	-	-	128	341	-	-	469
	Number of Properties	-	-	-	1	1	-	-	2
Padgate	Floorspace, sqm	-	-	381	-	-	-	-	381
	Number of Properties	-	-	6	-	-	-	-	6
Penketh	Floorspace, sqm	-	-	-	-	317	-	-	317
	Number of Properties	-	-	-	-	1	-	-	1
Stockton Heath	Floorspace, sqm	-	30	-	-	-	-	-	30
	Number of Properties	-	1	-	-	-	-	-	1
Thelwall	Floorspace, sqm	-	-	67	139	-	-	-	206
	Number of Properties	-	-	1	1	-	-	-	2
Town Centre	Floorspace, sqm	201	1,706	2,148	3,794	6,214	7,290	-	21,353
	Number of Properties	15	44	32	28	20	11	-	150
Westbrook	Floorspace, sqm	-	-	92	118	960	2,328	-	3,498
	Number of Properties	-	-	1	1	2	3	-	7

Area		Size Band, sqm						Total	
		0-20	21-50	51-100	101-200	201-500	501-1,000		1,001+
Wilderspool	Floorspace, sqm	27	68	129	111	1,929	1,937	-	4,201
	Number of Properties	2	2	2	1	5	3	-	15
Winwick	Floorspace, sqm	-	-	-	137	1,119	-	-	1,256
	Number of Properties	-	-	-	1	4	-	-	5
Woolston	Floorspace, sqm	-	-	92	-	-	-	1,091	1,183
	Number of Properties	-	-	1	-	-	-	1	2
Total	Floorspace, sqm	468	2,578	4,215	5,499	18,471	21,980	12,527	65,738
	Number of Properties	38	68	60	41	54	32	6	299

Source: BE Group, 2016

- 4.25 Elsewhere the supply is modest, with the partial exception of Wilderspool which had at least some availability in all size bands up to 873 sqm. Seven units were available at Westbrook, in sizes ranging from 92 sqm to 935 sqm.
- 4.26 All 11 vacant premises in Bewsey are found at Hawthorne Business Park, however these only totalled 191 sqm. Similarly, all six vacant premises in Padgate were in Padgate Business Centre. These totalled 381 sqm.
- 4.27 Figure 26 shows that 65 percent of available properties were of good quality, although 59.5 percent of those (116) were located in Warrington Town Centre and another 28.2 percent (55) were in Birchwood. 102 (34 percent) were of a moderate quality, however there are only two budget options – one in Culcheth, the other in the Town Centre.

Figure 26 – Quality of Marketed Office Property



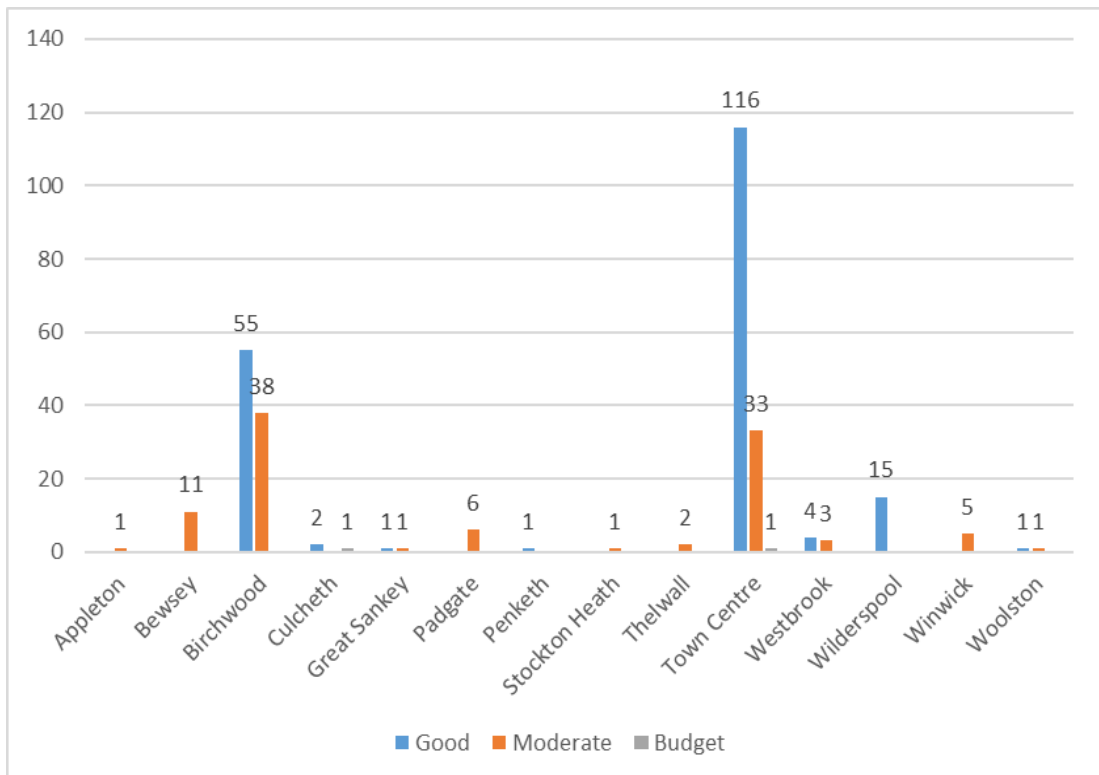
Source: BE Group, 2016

- 4.28 In the Town Centre, the supply of 'good' quality premises was skewed by the recently completed The Base, business centre which offers 53 new build suites. However, Birchwood does provide an offer of higher grade office accommodation for the

Borough, including properties which can accommodate mid-sized and larger businesses.

4.29 Figure 27 below shows that the clear majority of the available vacant premises (92 percent) were being offered on a leasehold term. 20 (7 percent) were offered freehold only, mostly in the Town Centre, and a further five percent were being offered to either to let or purchase.

Figure 27 – Tenure of Marketed Office Property



Source: BE Group, 2016

4.30 Freehold options were only available in Birchwood, the Town Centre and Woolston. For nine of the 14 areas in which vacancies have been identified, all of their options are offered on a purely leasehold term.

Valuation Office Data

Industrial

4.31 The latest Valuation Office (VO) statistics on total floorspace by local authority area are now four years old. This study has updated these figures to take account of identified new development since 2012, as set out in Council Completions data. The

adjusted figures indicate that there are 1,802 industrial hereditaments in the Borough, totalling 1,881,905 sqm. Within this there are 123 marketed premises totalling 82,259 sqm (see Table 13 above). This suggests an overall 'occupancy rate' for Warrington of 95.6 percent by floorspace. By premises numbers, the occupancy rate is 93.2 percent.

Offices

- 4.32 There are 1,585 office hereditaments in the Borough, totalling 508,811 sqm. Out of all this space there are 299 marketed premises totalling 65,738 sqm (see Table 15 above). This suggests an overall 'occupancy rate' for the study area of 87.1 percent by floorspace. By premises numbers the overall 'occupancy rate' is 81.1 percent, although this latter figure may be skewed by local business centres which offer multiple small serviced suites to the market but may only count as single hereditaments in VO data.

Property Market – Stakeholders

- 4.33 The above analysis of the property data pertaining to Warrington has been supported by consultations with commercial property agents active in the Borough. Agents were asked about activity levels in Warrington, key market sectors, spatial differences and the key employment nodes. Feedback from the agents is summarised in the tables below. Information provided has been separated from the name of the agent or agency to protect confidentiality. Table 16 provides a breakdown of the general comments received about industrial and office land in Warrington.

Table 16 – Property Market Comments – Land

Contact	Comment
National agent	The Council should look to allocate land in South Warrington where there is very little supply, but a great deal of demand. This could be delivered in the form of parcels of development land for owner-occupiers to build on, or as a small scheme (like Birch Court on Woolston Grange) offering units or offices from 100-300 sqm. It is felt that such a scheme would attract occupiers from a wider catchment area, extending to Knutsford and Chester.
National agent	Development land plots, and the resulting commercial developments are always in short supply locally. Feels that developers are now looking at options in South Warrington to address this.
National agent	More is needed in South Warrington as stock in North Warrington is facing rapid depletion. Development in the South would also be in line with current interest which is focusing more on the South. The Calver Nine Site, Winwick Quay is in the process of being sold to a used car showroom operator. They have taken all 5 ha of the site with the intention of delivering a large showroom, facing onto Cromwell Way,

Contact	Comment
	accompanied by a maintenance bay and ample customer parking.
National agent	<p>There is a shortage of land for all types of B-Class use in Warrington. Further provision is needed, either through new allocations or reallocating alternative use land for commercial purposes. Provision should focus in South Warrington, especially Stretton.</p> <p>Other similar locations to Omega, including Port Salford and Broadway Green, Oldham, will begin to draw interest away from Omega as it begins to run out of deliverable development land. Although they cannot compete with Omega in terms of prominence and motorway access, quickly deliverable options will begin to be favoured over time.</p> <p>The agent is currently struggling to satisfy a 14 ha client requirement in Warrington.</p>
Regional agent	An allocation of development land at Omega, for office uses, would strengthen Warrington's offer generally. This could be for speculative development, serviced space or Design and Build options. This would complement the large industrial/distribution supply here.
Sub-regional agent	Omega is meeting immediate demand for large scale industrial/distribution users, the need now is for office land to improve provision in that sector. Omega is nearing capacity however and thought should be given to a successor site for it. South Warrington (Stretton) would be a logical area of search for a successor site, reflecting demand patterns.
Local agent	Development land is needed in South Warrington for industrial, distribution, office and retail uses. Receive a high level of enquiries for this area, across all sectors. Elsewhere it felt that Warrington's land stock is satisfactory.

Source: BE Group, 2016

- 4.34 Table 17 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

Table 17 – Property Market Comments – Industrial

Contact	Comment
National agent	<p>Demand is for modern, well presented space in out-of-town locations. Late 1990's brick built schemes like Taurus Park, Gemini are a good example of what is enquired after. More such space would be desirable.</p> <p>Smaller units of 100-200 sqm let quickly with consistently high levels of demand. There is also a reasonable market for the mid-range premises of 300-700 sqm.</p> <p>Units from 1,000-1,500 sqm take longer to let – schemes like Bishops Court, Cameron Court and Melford Court all have larger options which have been on the market for some time.</p> <p>Woolston Grange is the most popular industrial area, with high demand against a modest vacant supply. Further small to mid-sized unit provision in South Warrington (e.g. Stretton) would reflect demand.</p>
National agent	See a quite high number of requirements for 2,000-5,000 sqm units, often with an area of interest covering both Warrington and Halton. In Warrington there is little stock of this scale to satisfy them. Units with a secure yard are at a premium due to a distinct lack of good quality stock with this feature.

Contact	Comment
	<p>Woolston Grange is a particularly popular area and so has limited vacant stock, especially of larger premises.</p> <p>Birchwood Park is providing hybrid options at Cavendish Place. However, these units are not typical of the broader offer.</p> <p>Reasonable quality units, of the right size and offering relevant features can achieve rents are around £78/sqm. Lower grade space in less favoured locations can achieve around £48/sqm.</p> <p>It is unusual to find freehold industrial stock and enquiries do not necessary reflect a demand for this.</p> <p>Generally, the industrial market is buoyant across all size ranges. Certainly, smaller units of around 200 sqm let quickly and tend to be the most commonly enquired after properties.</p>
National agent	<p>Deal with a range of refurbished units which formed part of the New Town era developments. These are focused in Birchwood and on Woolston Grange. Average sizes are 250 to 500 sqm, with a range extending to 5,000 sqm.</p> <p>Other available options are in Stretton. However, these units are much older and are struggling to find occupiers. This is due to condition, rather than rent which is currently being quoted at less than £54/sqm.</p> <p>General market interest is strong but supply is dwindling. Smaller stock of 300-500 sqm churns regularly, but the supply of larger scale 2,000-5,000 sqm units is limited relative to demand.</p> <p>Freehold demand is strong and deals have just completed on 300-500 sqm units on Cranford Court, Woolston Grange. There is no further supply of similar freehold options, but interest remains strong.</p>
National agent	<p>Demand is for premises of 1,000 sqm or less, with more modest interest for larger units up 2,500 sqm.</p> <p>Birchwood/Birchwood Park and Woolston Grange all offer a reasonable range of good quality units, with desirable office content. Gemini/Winwick has less stock and what it has is of an inherently lower quality. There are exceptions, however, including Canmoor Trade Park, which provide good quality, refurbished spaces able to command a higher rent level.</p> <p>Examples of rental levels are:</p> <ul style="list-style-type: none"> • Taurus Park, Gemini – £65/sqm, typical of reasonable quality, second-hand, refurbished industrial stock. • Winwick Quay – £54/sqm. • Birchwood Park – £75/sqm but this reflects the new build hybrid units, which are not typical of the area • New build Omega distribution units’ command rents of £54/sqm. Levels this high have not been achieved for distribution units in the North West previously.
National agent	<p>They deal primarily with older, New Town era stock. This property offer remains in demand but is approaching the end of its economic life in places. Rents of £32-£54/sqm can be achieved on such second-hand space.</p> <p>Occupiers are increasingly price sensitive and as these units suffer from a lack of parking, as well as a generally declining physical quality.</p> <p>Warrington, however, remains a principal location across all sectors as it boasts unique motorway and alternative transport access links.</p>
Regional agent	<p>The industrial market is consistently strong across all size ranges but especially for properties of up to 500 sqm. Rents of up to £65/sqm can be achieved for the best quality space.</p>

Contact	Comment
	Bishops Court, Winwick Quay is the only local area where units are struggling to let at present.
Sub-regional agent	Demand is strongest for 500-1,000 sqm properties and the supply is modest across the Borough and particularly in South Warrington where demand outweighs supply. Development in this location is key to unlocking further opportunities, for both industrial and office occupiers, in the future.
Local agent	<p>More industrial space is required in South Warrington an area for which they receive regular enquiries but are unable to satisfy. It is felt that the current Stretton supply is too small and not fit for purpose.</p> <p>Would generally like to see a strategic B2/B8 development like Omega on the M56 Corridor which would open up further Chester, South Liverpool and South Manchester markets. Such a scheme would have good motorway access and a reasonable link to Manchester Airport. In transport terms, the ability to avoid the frequently congested Thelwall Viaduct would be desirable.</p> <p>More generally, there is a lack of freehold options in Warrington.</p>

Source: BE Group, 2016

4.35 Table 18 provides a summary of the comments received on the local office property market.

Table 18 – Property Market Comments – Office

Contact	Comment
National agent	Office demand is for high quality space, with a good parking ratio. Birchwood offers a good supply of such offices within a decent size range. The shortage tends to be for larger freehold offices around 1,000-2,000 sqm. Premises of this specification will usually sell quickly.
National agent	<p>The most popular sizes are within the lower-mid range of 500 – 1,000 sqm. Generally, supply meets demand. Rents are £156-£161/sqm depending on size and quality. Leasehold deals are normally done on 5 year terms with a level of incentive offered depending on the landlord and strength of the incoming tenant (i.e. a period of 3-6 months' rent free).</p> <p>The market for sub-500 sqm is buoyant with plenty of complementary supply and demand and a focus on key Birchwood schemes such as Chadwick House.</p> <p>Prior to the 2008-2013 recession there was an oversupply of freehold properties. However, in recent years whilst demand has maintained, the level of stock has dramatically decreased.</p>
Regional agent	<p>Two distinct office markets:</p> <ul style="list-style-type: none"> • Sub-500 sqm units, required by micro and small businesses in the Town Centre. These are frequently small freeholds which traded well amongst owner occupiers' pre-recession, with demand beginning to emerge again • Larger, 2,000 sqm or more, second-hand stock, mainly in Birchwood. Potential occupiers for this size seem to favour a larger footplate. <p>The only area where premises can struggle to let is Centre Park where premises of around 350 sqm have been performing poorly recently.</p> <p>It was the further view of this stakeholder that "Warrington could learn from</p>

Contact	Comment
	<i>larger cities like Manchester in developing its Town Centre. By, for example, taking the new practices of Agile Working into consideration and invigorating the infrastructure of Warrington's public transport system, the Council can transform the town into a real hub of thriving business..."</i>
Sub-regional agent	Demand is for smaller-scale office properties of 500 sqm or less, focused at Birchwood. There is a limited supply in the Town Centre, although this is improving. Problems are arising with the increase of buildings/development plots in the town centre being sold to residential developers. The lack of pipeline supply will further push occupiers towards Birchwood where supply is good.
Local agent	Warrington's office market is focused in Birchwood, benefiting from both strong, and recently improved, motorway access and a generally high standard of premises. Town Centre congestion is a real problem and is felt to push occupiers to move towards Birchwood and Winwick. The Council need to consider the road infrastructure if expansion is to continue.

Source: BE Group, 2016

- 4.36 With Omega nearing capacity, it was the consensus of property market stakeholders that there is a need for further land allocations in Warrington. It was also broadly felt that these should focus on South Warrington, to take advantage of the key M56/M6 links, reflect current market interest and the lack of remaining supply along the M62 in North Warrington. There is a shortage of land for all types of B-Class use in the Borough, including offices and smaller industrial options, alongside the larger B2/B8 premises currently being provided at Omega. It was felt by some stakeholders that the provision of B1(a) offices at Omega would broaden the appeal of this strategic site, although others, both here and in Section 5.0, cautioned that demand may be insufficient to support a large office development here alongside the existing offers of Birchwood and the Town Centre.
- 4.37 In terms of industrial demand, comments vary, but the general view is that local demand is for units starting at 100 sqm and extending up to 1,000 sqm. Premises of 1,000-1,500 sqm can take longer to let. Larger businesses are looking for industrial and warehouse units of 2,000-5,000 sqm and their area of search can frequently extend across Halton and Warrington. There is a lack of units of this size in the Borough, which may mean that Warrington is losing out on some requirements to its neighbour. There is also a lack of freehold options locally.
- 4.38 Demand is strong for most of the main Employment Areas, and most are well occupied. Demand, relative to supply, is felt to be particularly strong at Woolston Grange and around Birchwood. Overall, the quality of local industrial stock is felt to

be good, Gemini and Winwick Quay are the only areas where concerns were raised. Rents for reasonable quality space are £54-65/sqm. New hybrid units at Birchwood Park are achieving £75/sqm, but this is exceptional. New build Omega distribution units' command rents of £64/sqm. Levels this high have not been achieved for distribution units in the North West previously.

- 4.39 Local office demand is primarily for suites of 0-500 sqm, in Birchwood and Warrington Town Centre. Larger requirements can extend to 2,000 sqm and tend to be focused at Birchwood only. There is a lack of Town Centre stock, relative to demand, while several potential office development plots in Warrington Town Centre have now been lost to housing. Congestion and transport access were also identified as issues in the Town Centre.
- 4.40 Birchwood is felt to have a reasonable supply of sub-500 sqm options, however, there is a shortage of 1,000-2,000 sqm properties, particularly freehold options, in the area and across the Borough generally. Rents of £156-£161/sqm can be achieved for reasonable quality space. Of the other Employment Areas in the Borough, only Centre Park is identified as a location where office suites, of around 350 sqm, can take time to let.

Summary

- 4.41 Nationally, prospects for the industrial and logistics markets are of rising demand, including freehold demand, against a reducing supply. 2014/15 saw a return of speculative development in the 'big box' market for B8 logistics and B2 larger manufacturing. In terms of B2 units, high quality development remains focused on properties of 5,000 sqm or larger, with only modest impacts on the regional supply picture to date. In terms of logistics, established sites such as Omega are nearing capacity, while elsewhere there are few 'oven ready' locations which have completed premises or can deliver options quickly.
- 4.42 Manchester, and to a lesser degree, Liverpool are office markets of national significance and are benefitting from growth in financial and professional services. In Warrington, dominant sectors include nuclear industries, with a growing prominence in construction and engineering. Nationally, there is a shortage of available stock, in particular Grade A stock, which is encouraging organisations to look at assets in strong secondary locations. This is less of an issue in Manchester and Liverpool which retain 3-4 years' pipeline supply.

- 4.43 Warrington & Co. has received 1,093 property enquiries over the last decade, most for industrial units of up to 4645 sqm. For offices, the bulk of the demand is for properties up to 1,858 sqm and few sought retail options larger than 929 sqm in size. Few enquired about land, but those that did generally sought plots of less than 2.0 ha.
- 4.44 Since 1998, BE Group has completed an annual report on Warrington's property market, particularly recording office, industrial/warehouse and investment deals of more than 200 sqm. In terms of investment activity since 1998, an average of 16 deals was recorded annually, achieving an average value of around £87 million. In the office market an annual average of 34 deals, in around 25,000 sqm of floorspace, was recorded while in the industrial sector the average annual transaction rate was 53 deals/year, taking up some 95,000 sqm of floorspace.
- 4.45 The local investment, office, and to a much more limited degree, industrial markets all saw declines in transactions over the recessionary period 2008-2012. Since 2013 however, Warrington's property markets have recovered well and indeed all three areas have seen clear peaks in recorded deals over this period. 2016 has also seen a modest resumption in speculative development locally.
- 4.46 As of July 2016 there was 82,259 sqm of industrial floorspace on the market, comprising 123 properties. That supply was focused in Winwick and Woolston with these two areas accounting for around half the available units and floorspace. In terms of floorspace, however, half the available supply in Woolston Grange comprised a single building, the 11,427 sqm Kingsland123 on Kingsland Grange. This was also the only property of over 10,000 sqm available in the Borough. There was a reasonable supply of good quality options at Winwick, Westbrook, Birchwood and Woolston. Budget options are mostly found in, and around, Warrington Town Centre. Freehold options are limited.
- 4.47 There were 299 offices on the market at July 2016, comprising 65,738 sqm of floorspace. The largest single supply was at Birchwood comprising around half the floorspace and a third of the suites. Birchwood is the only local Employment Area with a significant offer of suites greater than 1000 sqm in size. The bulk of the remaining supply is found in, and around, Warrington Town Centre which has a strong offer in the 21-200 sqm range, focused in three business centres. The local freehold offer is mostly focused in, and around, Warrington Town Centre.

- 4.48 Property market stakeholders highlighted the need for further employment land options, particularly in South Warrington. Local industrial demand is for premises up to 1,000 sqm. Larger businesses are looking for industrial and warehouse units of 2,000-5,000 sqm and their area of search can frequently extend across Halton and Warrington. The local supply of units of this size is modest against demand, particularly at Woolston Grange and around Birchwood. Rents for reasonable quality space are £54-65/sqm.
- 4.49 Local office market demand is for suites of 0-500 sqm, in Birchwood and Warrington Town Centre. Larger requirements can extend to 2,000 sqm and tend to be focused at Birchwood only. There is a lack of Town Centre stock, relative to demand. Birchwood lacks 1,000-2,000 sqm properties, particularly freehold options. Rents of £156-£161/sqm can be achieved for reasonable quality space.

5.0 STAKEHOLDER CONSULTATIONS

Introduction

- 5.1 This section provides commentary about Warrington, drawn from consultations with the public sector and other stakeholders – primarily the major businesses, major landowners and developers. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture.
- 5.2 In the case of businesses, the views of local companies are sourced from the ongoing private sector engagement work completed by Mickledore combined with results from the Warrington Business Survey, completed, by Mickledore in May 2016. To protect the anonymity of those contributing to this study, the details of individual public sector, company or developer/owner responses are not repeated in the Main Report.
- 5.3 The four main colleges and universities of Warrington have also been contacted and details of those discussions are summarised in Section 9.0.

Key Stakeholder Comments

Sub-Regional Growth Plans

- 5.4 A devolution deal was submitted for the Cheshire and Warrington LEP area. The stated growth target associated with this deal is for an effective doubling of the sub-regional economy to £50 billion by 2040, creating 127,000 new jobs and building 139,000 new homes. The LEP have confirmed that this devolution deal will be the basis for reviewing the SEP. However, the target set is for an area extending beyond the formal LEP area boundaries that also incorporates parts of North Wales and Staffordshire.
- 5.5 The Warrington component of this is referred to as 'Warrington New City', and the target is for 26,000 new homes and 55,000 new jobs over 2015-2040. Again, this growth will be 'across the economic hinterland' which extends beyond the Warrington Local Authority area. In Section 8.0, the likely proportion of this 'policy on' labour growth which will be within Warrington Borough is considered.

- 5.6 It should be noted that, as of June/July 2016, negotiations on this sub-regional devolution deal were on hold. This follows a failure between local and national politicians to reach an agreement on key elements of deal, specifically the prospect of an elected mayor.

Local Growth Opportunities

- 5.7 Both public and private stakeholders wish to see further growth in Warrington Borough. Several major employment or mixed-use development sites, additional to the land supply set out in Section 6.0, were put forward. Several are linked to existing strategies for change while others are new initiatives for the Borough. All remain subject to planning consent, while two would also require changes to Warrington's current Green Belt boundaries to deliver.

Port Warrington

- 5.8 This will be an extension to the current port facilities on the Manchester Ship Canal with links to the Warrington Waterfront proposals. Logistics will be based around the Port, with a high-quality business park closer to the town centre. It would be served by the new link road and bridge which are expected to be delivered by 2020. The road will also connect to the A57 and Forrest Way Business Park (Employment Site 309), to support development on this site. Overall, some 113 ha could be opened up by road improvements for a mixture of housing and employment uses. Most of this land is currently in the Green Belt although some 14 ha around the current Port could be delivered without changes to the Green Belt boundary.

South Warrington

- 5.9 Current developer aspirations are to deliver a strategic scheme in the south of the Borough. Most of this land is currently in the Green Belt. Development could be for a mix of uses, but demand is dominated by larger B2/B8 options. A site more than 100 ha in size could be delivered here.

Southern Gateway

- 5.10 An established, edge of centre regeneration programme for central Warrington. It incorporates land south of the Town Centre, along the A49 Corridor, including the Bus Depot, St James Business Centre, Latchford Sidings Bridge and land to the east, mostly comprising Palatine Industrial Estate and areas of Priestley College. Current proposals would see land around the current Bus Depot site, developed for

office uses and land further south developed for housing. Land acquisitions are underway to support this.

Stadium Quarter

- 5.11 The current, ongoing Stadium Quarter scheme is discussed in Section 9.0. Stakeholders also highlighted that further expansion of this regeneration area, east across Winwick Street to the A49 Lythgoes Lane frontage may be possible. However, this would require land purchases to secure sites which are, in some cases, being progressed for other uses. If this area was made available for B-Class development it could deliver another 5 ha.
- 5.12 Discussions with the HCA also highlighted development options on land within the St Helens local authority area, that abuts Omega. This is discussed further in Section 7.0.

Market Comments

- 5.13 In discussions, key stakeholders highlighted the strength of the local industrial market. Across both Halton and Warrington, there is good demand for industrial units of up to 2,000-2,500 sqm. If the requirements cannot be met in one local authority area, occupiers are frequently willing to consider options in the other. At present, a lack of options in Warrington is pushing occupiers towards Manor Park and Preston Brook in Runcorn.
- 5.14 At Omega the market for larger B2 and B8 premises remains strong and most of the remaining undeveloped land is likely to be taken up by such operations, including much of the land currently consented for B1 options.
- 5.15 The office market is more modest, particularly outside of Birchwood, and Warrington does face competition for larger office requirements from Manchester. Birchwood will continue to compete with Daresbury for office uses although the more immediate demand in Birchwood is reported to be for good quality industrial and warehouse options. Office market demand is also felt to be insufficient to support another large out of town office area in Warrington, e.g. at Omega.
- 5.16 Micro business demand, both for offices and workshops, is healthy. Business centres in, and around, the Town Centre are well occupied while reasonable interest in The

Base has been recorded for the first half of 2016. Indeed, one business centre operator reported a shortage of sub-50 sqm options locally that meant the operator was having to direct occupiers to equivalent schemes in St Helens.

Business Consultations

- 5.17 Mickledore has undertaken business engagement on behalf of the Council for the last five years. The work involves 30-50 new company meetings each year.
- 5.18 Companies selected for engagement are generally identified as having capacity for expansion and the ability to play a greater role in the economy of Warrington. As a result, the majority of these businesses are medium or large in size, although this is not exclusively the case.
- 5.19 The interviews are undertaken across the Borough and are not intended to focus on specific industry sectors, but rather to get as broad a view of local company aspirations as possible.
- 5.20 Most engagement has been with businesses already located in Warrington, but contacts have also been made with potential new investors to the area. This has provided an understanding the limitations or opportunities of the land and property offer available to these investors.

General Views

- 5.21 In general Warrington is seen by companies as a good location for investment with identified strengths including access, central location to the North West and national market, available workforce and good rail (and air) links.
- 5.22 Respondents are generally satisfied with Warrington's modern property offer and opportunities in Birchwood, Omega and Gemini have attracted internationally owned businesses. In comparison, the Town Centre, excluding Centre Park, has not seen significant inward investment.
- 5.23 Warrington is home to several headquarters for major businesses including Electricity North West, United Utilities, Sellafeld Ltd, Betfred, Fircroft and Stobart Group. In addition, there are European and UK HQs for Phonak, New Balance, Certas Energy and Asics.

- 5.24 In terms of logistics and manufacturing sectors, large companies located here tend to be regional rather than national centres, primarily serving markets in the Midlands, North of England and Scotland.
- 5.25 One noted trend is that the arrival of many new entrants to the Borough from the 1970s onwards has meant that Warrington has been less susceptible to the shift in employment away from traditional industries.
- 5.26 Where respondents made negative comments about the Borough's property offer, it tended to be with the earliest of the New Town property schemes which are aging and in need of investment and refurbishment. Employers also raised concerns about skills shortages, particularly in engineering, and road access/congestion. Congestion was a concern in Birchwood although recent investments between Junction 11, M62 and Birchwood Park have done much to improve accessibility.
- 5.27 Stockton Heath was identified as having traffic congestion issues. Businesses have also expressed concern about car parking, maintenance and low level crime in Woolston Grange.

Industry

- 5.28 Warrington was historically a manufacturing location with companies operating in several sectors including fabricated metals, electrical and chemicals. The Borough incorporates a number of larger manufacturing operations, some of which pre-date the New Town era. Several of these historic facilities are in comparative backland locations, distant from the motorway junctions and bounded by infill residential development.
- 5.29 Some local manufacturing remains under threat because of competitive cost pressures or changing processes/products within their industry. In recent decades, Warrington has lost manufacturing employment, although at a lower rate than many other North West local authority areas. In the last decade companies employing significant numbers of people such as Memory Lane (bakeries) and New World (domestic appliances) have left the town.
- 5.30 In addition, there may be some locations which could become available because of the obsolescence of the current process. One large example is the SSE power station development at Fiddlers Ferry which is reducing output because of changes in the electricity generating mix in the UK.

- 5.31 Where those businesses do seek to reinvest elsewhere in Warrington rather than on their existing site, there are few local locations that would appear suitable for the more traditional manufacturing processes involving metals, engineering and chemicals. While Warrington has a reasonable base of light industrial occupiers, there is generally a lack of sites and premises which could support more bespoke operations and attract inward investment.
- 5.32 The obvious exception to these comments is Omega, which has proven to be a location which can secure manufacturing investment. A paucity of sites close to Jaguar Land Rover's production unit in Halewood, Liverpool has resulted in Plastic Omnium recently investing in the site. Omega may continue to play a role as an outlet for demand which cannot be fulfilled in the Liverpool City Region.

Warehousing

- 5.33 The principal location for warehousing operations in Warrington is Omega with secondary centres in Stretton, Woolston/Birchwood and Gemini.
- 5.34 Prior to the development of Omega, Woolston Grange was the focus of warehousing activities and area retains a sizable B8 offer. However, the scale of the buildings is now significantly smaller, and with lower eaves height, than is typically required for large logistics businesses. The number of B8 operations in Woolston Grange is reducing.
- 5.35 There are several large established warehousing operations elsewhere in Warrington Borough, including PepsiCo in Birchwood and Stobart in Stretton. However, neither location has become a centre of new distribution activities with Birchwood lacking space for further large scale developments and issues such as site access and no mains gas reducing the attractiveness of Stretton.
- 5.36 Historically, Warrington has lost out on the largest regional and national distribution operations to locations such as Haydock, Heywood, Middlewich and other sites in Knowsley, Liverpool and St. Helens. The current success of Omega in attracting big shed warehousing such as Asda and The Hut Group has demonstrated the pent up demand in this sector, both across the North West and nationally.
- 5.37 Conversations with companies distributing from Warrington suggest that changes in the retail sector with increased online shopping will continue to drive demand and

encourage expansion.

Offices

- 5.38 Office employment is focused in Birchwood with smaller concentrations of activity in Gemini and Centre Park. The Town Centre offer is modest by comparison.
- 5.39 The service sector workforce is mobile and drawn from a wide catchment. Warrington has become a hub for companies involved in consulting engineering, other consultancy work, maintenance engineers, customer service activities and associated functions that offer services across a wide geographic area and require staff to visit client sites. Motorway access is important for these types of activity and Warrington continues to attract businesses of this type.
- 5.40 Warrington has historically been a centre for large call centre activities, primarily in Birchwood. However, no new centres of this type have been secured recently and some of the existing operators have reduced their headcounts and indeed closed their local operations. One of the reasons given for this decrease in call centre activities has been the difficulty of recruiting younger workers locally, compared to the much larger catchments of Manchester and Liverpool.
- 5.41 More generally, Warrington is continuing to attract larger office occupiers such as the Home Office, but is facing strong competition for regional requirements from Daresbury and Central Manchester.
- 5.42 In terms of the existing business base, several key sectors have good prospects for growth. Consulting engineering, architecture and associated professional groups will benefit from ongoing investment in major rail, road, airport and energy projects. In terms of the nuclear sector, which remains key in Birchwood, growth is expected in the sector as decommissioning accelerates and a new build programme gets underway in the UK. The level of growth is hard to predict though as the UK's major nuclear projects have been fraught with delays. There is currently a pause and some uncertainty in the sector, which is holding back investment and expansion.
- 5.43 In terms of property supply, significant refurbishment of the main Birchwood office developments has taken place over recent years although some of the 1960/70s schemes remain in need of renovation. During the period of the business engagement work few businesses seeking to expand have left the area because of

office space constraints. The largest exception was the Ombudsman Service who vacated premises in Stockton Heath and moved to Daresbury.

- 5.44 Consultations with major businesses which did consider taking up space locally, but ultimately chose to locate elsewhere, suggest that limitations in Warrington's supply of larger offices was a factor in that choice. An example of this is Costain which located a new office development in Manchester, partly because of office space limitations.

Warrington Business Survey

- 5.45 In May 2016 a business survey, independent of this study, was undertaken on behalf of the Council to gauge the views of businesses based in Warrington. The survey asked questions on a range of topics including expansion potential and land and property needs.
- 5.46 The survey was sent online to a sample of 3,418 businesses and received 199 returns, which represents a 5.8 percent response rate. Survey results, relevant to this study, are summarised here.

Employment

- 5.47 Around half of the companies surveyed reported no change in their workforce over the last 12 months. A third have increased their labour force, mostly by 1-5 employees, while 13.9 percent have shed labour by a similar amount. Larger businesses, with more than 50 employees, are more likely to have increased their workforce than smaller companies. 23.8 percent of micro businesses reported labour growth against 52.2 percent of larger firms.
- 5.48 Four in ten companies surveyed intend to recruit new staff over the next year. Aspirations for labour force growth were most common in the professional, scientific and technical sector (63.6 percent) and amongst larger companies (65.2 percent amongst those with over 50 employees) compared to micro businesses (26.7 percent amongst those with between 1 and 10 employees). Again projected jobs growth is generally between 1 and 5 employees.

Relocation and Expansion Plans

- 5.49 Over a quarter of respondents, 27.7 percent, intend to relocate in the next five years. Only two businesses with more than 50 employees are considering a move,

compared to 29.7 percent of those with 1-10 employees.

- 5.50 The most commonly stated reason for wishing to relocate is that the businesses current property is the wrong size. 15 need a larger property while three are looking for smaller space. Other reasons given are that the current facility is too expensive, both in terms of rents and business rates; too dated; not fit for purpose in terms of configuration and fit out; in an area of traffic congestion or subject to local car parking issues.
- 5.51 Of the 49 potential property requirements, three quarters would be seeking office space. The remaining are for a, even mix of industrial, warehousing, retail and 'other' space. In terms of size, half would require properties of up to 100 sqm and another quarter require property of 101-250 sqm. Other potential requirements extend up to 2000 sqm.
- 5.52 Of the companies considering a move, just under half (46.7 percent) would look to move within Warrington Borough only. 11 respondents said that they would consider a move out of Warrington. Reasons for leaving the Borough include a desire to be nearer clients, Warrington's traffic congestion, business rates and rents being too high in Warrington.

Summary

- 5.53 In addition to Warrington Borough Council, Warrington Chamber of Commerce and the Cheshire and Warrington LEP, key local developers and major landowners were consulted on a one to one basis as part of the Study. The Study has also drawn on ongoing businesses engagement work undertaken by Mickledore and a survey of local businesses completed, independent of this study, in May 2016.
- 5.54 A devolution deal was submitted for the Cheshire and Warrington LEP Area. If political agreement can be secured to allow it to proceed, targets for the Warrington New City market area are for 26,000 new homes and 55,000 new jobs over 2015-2040.
- 5.55 The major developers and landowners of Warrington have strong aspirations for growth and highlighted several large-scale opportunities for B-Class development. The focus is around the existing Port of Warrington on the Manchester Ship Canal and land in South Warrington along the M56 Corridor. Realising either would require an adjustment to Warrington's Green Belt boundaries.

- 5.56 In discussions, key stakeholders highlighted the strength of the local industrial market generally. Across both Halton and Warrington, there is good demand for industrial units of up to 2,000-2,500 sqm.
- 5.57 Prior to the start of the development of Omega Warrington was unable to accommodate several large warehousing enquiries which variously located in St. Helens, Haydock, Heywood and others – in some cases Warrington lost occupiers because of a lack of suitable sites. The recent success of Omega has demonstrated the continued demand for Warrington locations from users of this type.
- 5.58 In terms of offices, key local sectors have strong prospects for growth. Warrington is also continuing to attract larger office occupiers but is facing strong competition for regional requirements from Daresbury and Central Manchester. A lack of larger office options may mean that the Borough is losing out on some inward investment requirements that might otherwise be secured and there is a need for ongoing refurbishment of some older property schemes, particularly around Birchwood. In the short term. Office market demand is also felt to be insufficient to support another large out of town office area in Warrington, e.g. at Omega.
- 5.59 Micro business demand, both for offices and workshops, is healthy. The Borough's businesses centres are performing well, with a potential shortage of sub-50 sqm options in the Borough.
- 5.60 The Business Survey was only able to secure a modest response from local companies. However, those that did respond were reasonably confident about prospects for growth. Just over a quarter of the 199 respondents suggested they might wish to relocate in the next five years although this was frequently due to dissatisfaction with their current premises rather than a desire to expand operations. Requirements were for office properties, with most needing 0-250 sqm units. Around half would only seek property in Warrington Borough although the rest would look at a broader area of search.

6.0 EMPLOYMENT LAND

Introduction

- 6.1 This section looks at the existing portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Warrington needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. By initially establishing how much land there is, the second task is to consider how much land is needed in the future (to 2037), which is picked up in the Section 8.0 later in the report.

Land Supply

- 6.2 The start point for the supply side assessment is the Council's Employment Land Sites Schedule, dated 31st March 2016. This indicates that there are 30 sites totalling 231.87 ha. This comprises a local supply of 82.24 ha in 23 sites (35.5 percent of the floorspace total), a strategic supply of 149.63 ha in seven sites at Omega (64.5 percent). However, consideration of both the local and strategic land supply suggests that these totals include areas of land which will not be brought forward for development, will be developed for non B-Class uses or where development completed prior to 31st March 2016. Table 19 outlines the assumptions made about sites included in the Council's monitoring records, explaining why revised site areas have been used in some cases.
- 6.3 The table also provides comments on status (e.g. owner intentions) together with an assessment as to when they might come forward for development or use. This assessment of timescale is based upon several factors – market demand, overview (from discussions with stakeholders and site owners), planning status, infrastructure and services required. More detail is provided in the proformas for each site (which include plans), which are provided at Appendix 3.
- 6.4 It is also noted that in August 2016 Satnam Millennium submitted an outline application for a new residential neighbourhood at Peel Hall (App. No. 2016/28492). Proposed uses included 7,500 sqm of B1(c) premises on land close to Junction 9, M62. However, at the time of writing that application remains undecided and the 7,500 sqm is thus not considered part of Warrington's identified baseline employment land supply.

Table 19 – Employment Sites Schedule

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
Strategic Employment Land Supply - Omega					
Omega 1 4(L)	Omega North - Parcel 4(L)	2.06	2.06	<p>Falls within 2003/01449 – General Outline consent for Omega Phases 1 and 2 involving phased redevelopment for primarily employment uses (offices, industrial, storage and distribution) with associated development for subsidiary uses (retail, food and drink, non-residential institutions and hotel), and associated car parking, landscaping and infrastructure.</p> <p>1.32 ha here is also proposed for development as offices and a parts and service facility for Haydock Commercial Vehicles. It is expected that this will be completed by the end of 2017.</p> <p>Other land in this area, extending to 1.89 ha and incorporating additional land, previously held by Travis Perkins, was purchased in September 2016 by Brackley Property Developments. It is intended that the area will be promoted for design and build industrial or distribution uses, to accommodate units from 5,000 sqm to a maximum single unit of 8,500 sqm.</p> <p>Strategic – B2/B8</p>	1-5
Omega 7A	Omega South - Plot 7A	17.68	0.00	Now developed as a 63,638 sqm new HQ for The Hut Group	Developed Site
Omega 7C	Plot 7C Omega South	7.65	7.65	<p>Reserved Matters consent for a logistics facility</p> <p>Under construction as a 33,000 sqm B8 warehouse property, expected completion by autumn 2016</p> <p>On the market as 'Prime@Omega'. Available leasehold</p> <p>Strategic – B2/B8</p>	0-1
Omega 7D	Omega South - Plot 7D	8.12	3.20	<p>4.92 ha in the south of the site is now developed as a 18,580 sqm manufacturing plant for Plastic Omnium.</p> <p>The remaining 3.20 ha will be held for the expansion of Plastic Omnium, or a future occupier.</p> <p>Strategic – B2/B8</p>	6-10

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
Omega Phase 3 Remainder	Omega Phase 3	51.36	0.00	Outline consent for 1,100 homes and a zone in the north east for some 10,000 sqm of retail (Use Classes A1-5), hotel (Use Class C1), Extra Care facility (80 bed, Use Class C2), Non-residential institutions (Use Class D1)	Will be developed for non B-Class uses.
-	Omega Phases 1 and 2 Remainder	29.06	29.06	<p>Revised consents for 256,317 sqm, of which no more than 74,260 sqm gross is to be used for B1 purposes; 155,781 sqm is to be used for B2/B8 purposes (comprising 100,039 sqm; B8 Omega Phase 1 55,742 sqm B2/B8 Omega Phase 2); 16,723 sqm shall be used for B2 purposes (Omega Phase 2); 11,150 sqm gross for a hotel (Class C1) purposes and no more than 1,200 sqm, for A1/A3/A4/A5 and D1 purposes</p> <p>Omega masterplan identifies the western portion for further manufacturing and logistics units of up to 23,226 sqm, the eastern section is proposed for offices and non B-Class use.</p> <p>2.79 ha now has reserved matters consent for a 10,870 sqm supply chain centre, to be developed for the exclusive use of Domino's Pizza.</p> <p>Indicative split based on current consent:</p> <ul style="list-style-type: none"> • Strategic – B1 – 8.72 ha • Strategic – B2/B8 – 20.34 ha. 	6-10
Omega Zone 7 Remainder	Omega South - Zone 7	33.70	33.70	<p>Outline consent for up to 196,000 sqm of B2/B8 space across all of the Zone 7 sites</p> <p>Omega masterplan identifies this site for industrial and/or logistics options, in one or two development plots, of up to 83,613 sqm.</p> <p>On the market for design and build options</p> <p>Strategic – B2/B8</p>	1-5
Sub Total		149.63	75.67		
Local Employment Land Supply					
36c	Gemini 16, Westbrook	7.60	2.20	<p>5.40 ha in the west of the site has Outline/Reserved Matters consent for housing.</p> <p>Some 2.20 ha in the east remains available for employment use and benefits from an open consent for B1, B2, B8 uses under Section 6.1 / 7.1 of the New</p>	6-10

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
				Towns Act. However, the owner is understood to be considering retail uses here, with interest expressed from a foodstore operator. However, land remains a key part of the wider Gemini Employment Area and could support office uses on land now adjacent to housing. B1(a) office	
216	Stanford House (Land at), Garratt Field, Birchwood	2.25	0.00	2.25 ha covers the entirety of the Stanford House curtilage, including the existing buildings and car parking. Site previously had full consent for erection of 4 storey office building with 150 car parking spaces. The consented property, 4,940 sqm over four storeys, would only require 0.32 ha at a development density of 3,900 sqm/ha. However, site agents report the site was purchased by the current owner as an investment for the rental income of Stanford House, not for further development. Thus proposed scheme, consent for which has now lapsed, is judged unlikely to ever come forward.	Assume will not come forward
309	Forrest Way Business Park, Forrest Way	7.50	7.50	Site has outline consent for up to 22,324 sqm of B1, B2, B8 premises, with individual buildings not to exceed 4,645 sqm each Previously marketed, for sale, as nine development plots of 0.4-2.0 ha, with options to combine plots a make a single development site of up to 7.30 ha. Owner has taken the Business Park off the market, with no sales completed. The current plan is to await completion of the new cross-Mersey link road, which will run adjacent to the site. After that the Business Park will be better accessed and more likely to attract market interest. The road is expected to commence from 2018. Assumed development for 50 percent B1(c)/B2 industrial and 50 percent B8 - 3.75 ha each	6-10
324	Land at Cameron Court/Colville Court/Chetham Court, Winwick	9.42	0.00	Area has full consent for the erection of new employment units, along with the reconfiguration of existing units at Cameron, Colville and Chetham Courts. 9.42 ha covers the whole Winwick Quay area, including developed property. Land for new build units only (6,377 sqm of new space in nine units is consented) equates to 1.63 ha at 3,900 sqm/ha.	Assume will not come forward

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
	Quay			However, site agents report that Winwick Quay was purchased by the current owners in 2015 as an investment only. New development will not be progressed here.	
336	Land off Bewsey Road	0.28	0.15	Full consent for four, mixed A1 retail and B1(c) light industrial units totalling 694 sqm Site area reduces to 0.15 ha if land for A1 retail use is excluded Units under construction. B1(c) Industrial	0-1
353	24 Kingsland Grange, Woolston	6.20	0.00	6.20 ha covers the whole of 24 Kingsland Grange. Land for the new build office proposed (262 sqm) only equates to 0.07 ha at 3,900 sqm/ha. However, consent appears to have lapsed in October 2015. Site currently occupied by open storage, small scale storage units and hard standing. No evidence that applicant wishes to implement this scheme.	Assume will not come forward
355	Perstorp UK Ltd, Baronet Road, Latchford	1.51	0.00	Full consent for an office building within curtilage of chemical plant, car parking and associated landscaping. Also a new internal access road across the Perstorp site. 1.51 ha incorporates access roads through the chemicals complex. The proposed 982 sqm office building would only require 0.25 ha at 3,900 sqm/ha. However, consent appears to have lapsed in February 2016. Office was proposed for the sole use of Solvey/Perstorp UK, to accommodate plant engineers and business staff currently housed in Portacabins or otherwise distributed across the site. No evidence that applicant wishes to implement this scheme.	Assume will not come forward
356	Gemini 8 Retail Park, Charon Way, Westbrook	5.21	5.21	Outline consent for redevelopment for B1/B2 and B8 business uses together with Hotel (C1) and pub/restaurant (A3/A4). Non B-Class premises have been developed. Outstanding comprises: <ul style="list-style-type: none"> • 3.18ha – B1(c)/B2/B8 industrial (12,450 sqm gross floor area) • 2.03ha – B1(a) office (10,917 sqm gross floor area). 	6-10

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
				Land is on the market for design and build developments of 929-18,581 sqm on either a freehold or a leasehold basis.	
360	Land at Stanley Street	0.05	0.05	Outline consent for a 1,677 sqm, five-storey office building Land currently a small contract car park, operated by the owner. Site on the market B1(a) office	6-10
362	Former Dallam Day Centre, Dallam Lane	0.48	0.00	Full consent for a five storey office building with associated access, parking, landscaping and infrastructure. Proposed as for business start-up "incubator" units (Use Class B1(a) and (b)) totalling 4,645 sqm Scheme completed in January 2016. Incubator scheme is now marketed as 'The Base'. Offers office suites of 30-140 sqm, to let to advanced manufacturing and engineering businesses.	All B-Class development completed onsite
363	Novelis UK, Latchford Locks, Thelwall Lane	0.30	0.30	Full consent for a new barn extension and erection of dust filter unit. A further 3,012 sqm total gross internal floorspace proposed (Use Class B2) as an automotive scrap recycling facility, providing an additional line to the existing aluminium recycling processes that are undertaken at the Latchford Lock Works. B2 industrial	1-5
365	Calver Park, Calver Park Road	6.16	0.00	Outline consent for 11 B1, B2, B8 units of 382-4923 sqm, totalling 14,899 sqm, plus a 1,722 sqm car showroom at the junction of Calver Road and Cromwell Road. Initial site preparation underway Site agents report that the owner is now seeking to develop the whole site for a single sui generis car showroom of 3800 sqm, with associated car maintenance and parking facilities, for The Car People. This would be subject to any revisions on the current planning consents required. Completion of this scheme is expected by April 2017.	Assume site now lost to sui generis car showroom use.
366	Plot R, Lakeside Drive	0.26	0.26	Full consent for a 2,007 sqm office extension and an additional 58 space car park, in two sites south and west of the current office building	1-5

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
				Part of the curtilage of Sonova House (4,686 sqm), occupied by Phonak. Site currently comprises car parking and landscaping for Sonova House. Office is for the exclusive use of Phonak, to house an additional 46 employees (to 338 staff overall), reflecting predicted business growth over 2015/16 B1(a) office	
367	The Quadrant (South), Birchwood Park	3.64	1.87	Full consent for seven units totalling 12,225 sqm. Units 711 (1298 sqm), 712 (1623 sqm) and 713 (2008 sqm) are completed. 712 is let while 711-713 remain on the market, to let. Thus four units totalling 7,296 sqm remain to be delivered on approx. 1.87 ha of land. Falls within the Cheshire Science Corridor Enterprise Zone. Further units are proposed as primarily B8 options. Further development will be dependent on ongoing market expansion.	1-5
368	Plot 4 - Barleycastle Trading Estate, Lyncastle Road, Appleton Thorn	1.62	0.00	Full consent for a 2,830 sqm B8 storage and distribution warehouse with ancillary office/welfare facilities, creation of 39 delivery van parking spaces and 63 car parking spaces Section 106 agreement signed relating to transport contributions Proposal is to meet the exclusive needs of Warburtons. Consent lapsed in May 2016 Assume will not come forward	Assume will not come forward
369	Tanyard Farm Estate, Rushgreen Road, Lymm	1.66	0.00	Outline consent for the demolition of existing buildings and erection of replacement buildings, comprising B1(a), B8 or D2 premises: <ul style="list-style-type: none"> • B1 = 644 sqm (as currently exists on site) • B8 = 1,279 sqm (as currently exists on site) • D2 = 210 sqm (as currently exists on site) Total = 3,250 sqm Proposal is for the redevelopment of the existing premises with no additional B-Class development proposed.	Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
370	Unit 910, Centre Park, Lakeside Drive	0.06	0.06	Full consent for a two storey side extension of 406 sqm and re-cladding of existing building. Proposed for the for the exclusive use of Brevini UK. B1(a) office	1-5
380	Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington	0.80	0.00	Full consent for a 460 sqm B2 general industrial unit Will replace and upgrade an existing workshop located to the rear of the site. Intended for the exclusive use of the site owner and occupier.	Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington
381	Plots 107, 501-502, 611-612, 701-702 and Quadrant, Eastern Edge, Birchwood Park	11.66	11.66	Outline consent for up to 50,464 sqm of B1 floorspace, 27,129 s m of B2/B8 floorspace and 1,000 sqm of A1/A2/D1/D2 floorspace subject to a combined floor area of 70,379 -72,089 sqm. The differing totals reflect that at least one plot (701-702) may be developed for different amounts of B1 or B2/B8 floorspace. The permission will assume the demolition of three existing buildings totalling 7,642 sqm. Proposal extends across six parcels of land across Birchwood Park: <ul style="list-style-type: none"> • 107 (1.04 ha): Had previous outline planning permission for a B1 office building in 2008 (renewed in 2012); Interest from a private occupier for an office development here • 300 (0.50 ha): Proposed for office uses • 501-502 (2.76 ha): Proposed for office uses. Has a previous consent for some 20,000 sqm of B1(a) space • 611-612 (1.16 ha): Proposed for office or industrial uses, with interest from an existing Park occupier for expansion. Currently accommodates Areva. • 701-702 (4.41 ha): Proposed for industrial uses • Quadrant (1.79 ha, some overlap with Site 367: The Quadrant (South)): The 	10+

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
				<p>bulk of the site is now marketed for a warehouse pre-let opportunity of 9,754 sqm, referred to as 720 Cavendish Avenue</p> <p>All the plots apart from 611-612 fall within the Cheshire Science Corridor Enterprise Zone</p> <p>All development will be on a design and build basis, responding to individual requirements as they arise. Speculative development is not proposed at this time.</p> <p>Current likely development split:</p> <ul style="list-style-type: none"> • B1(a) – 4.3 ha • B2/B8 – 5.57 ha • B8 – 1.79 ha 	
382	Benson Road, Birchwood	0.24	0.24	<p>Outline consent for a 2,400 sqm two-storey office block with supplementary parking and a link bridge the existing space at the Spectrum Centre.</p> <p>Office could provide further space for Betfred, a second occupier, or most likely a mix of the two.</p> <p>B1(a) office</p>	1-5
357	Phase 1 Remainder - Lingley Mere	2.35	2.35	<p>Outline consent for 8,808 sqm of floorspace (use class B1(a))</p> <p>On market as design and build options</p> <p>B1(a) office</p>	6-10
15 A(c)	Phase 3 - Lingley Mere	3.62	3.62	<p>Outline consent for employment development comprising 1,600 sqm B2; 13,000 sqm B8; 1,250 sqm ancillary B1 and associated uses.</p> <p>Area likely to support a 9,290 sqm shed, to be built speculatively once funding can be secured. The developers have attempted this previously, but internal requirements to relocate staff parking put the last interest on hold.</p> <p>Most of the frontage of this site now comprises car parking</p> <p>No short or medium term plans for delivery here. Immediate focus is on residential development on Site 15A(g).</p> <p>Indicative development split based on the current consent:</p> <ul style="list-style-type: none"> • B1(a) – 0.29 ha • B2 – 0.36 ha 	6-10

Site Ref.	Site Name	Stated Site Area*	Revised Site Area	Comments/Justification for Change	Availability, years
				<ul style="list-style-type: none"> B8 – 2.97 ha 	
15 A(g)	Phase 2 - Lingley Mere	9.37	0.0	Outline consent for demolition of buildings and development of 275 dwellings	All land now consented for housing
Sub Total		82.24	35.47		
Total		231.87	111.14		

Source: WBC and BE Group, 2016 *Taken from the Warrington Borough Council Employment Land Sites Schedule, 2016

- 6.5 Allowing for these revisions gives a revised supply total of 111.14 ha, comprising:
- Local supply: 35.47 ha (31.9 percent)
 - Strategic (Omega): 75.67 ha (68.1 percent).
- 6.6 In the case of the local supply, reductions reflect the fact that 5.40 ha in the west of 36c: Gemini 16, Westbrook has Outline/Reserved Matters consent for housing. Research also suggests the six other sites, totalling 27.16 ha, will not come forward in their present form or have defined proposals for non B-Class uses. Two sites – 369: Tanyard Farm Estate, Rushgreen Road, Lymm (1.66 ha) and 380: Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington (0.80 ha) – are proposing a redevelopment of existing premises with no net gain in B1, B2, B8 land or property. Finally, developers of 362: Former Dallam Day Centre, Dallam Lane (0.48 ha) report that development of ‘The Base’ incubation centre completed in January 2016. At Lingley Mere 15 A(g): Phase 2 - Lingley Mere (9.37 ha) is also now consented for housing.
- 6.7 At Omega, the original 149.63 ha supply is halved by recent events including the consent for a housing-led scheme on Omega Phase 3 (51.36 ha) and completions of B2/B8 premises on 22.6 ha.
- 6.8 In addition, the following sites are likely to be developed to meet the exclusive needs of specific occupiers. They are not available to the broader market needs and thus can be considered as outside of Warrington’s available employment land supply:
- 363: Novelis UK, Latchford Locks, Thelwall Lane (0.30 ha) – Development is for the exclusive use of Novelis
 - 366: Plot R, Lakeside Drive (0.26 ha) – Proposal is for expansion space for Phonak
 - 370: Unit 910, Centre Park, Lakeside Drive (0.06 ha) – Proposal is for expansion space for Brevini UK
 - Omega South - Plot 7D (3.20 ha) – The remaining land would only be developed as expansion space for the Plastic Omnium facility.
 - Omega Phases 1 and 2 Remainder - 2.79 ha now has reserved matters consent for a 10,870 sqm supply chain centre, to be developed for the exclusive use of Domino’s Pizza. This reduces the available land here to 26.27 ha.

6.9 Therefore, in Table 20 scenarios are presented for Warrington’s land resource, considering the total supply initially and then adjusting it per the various assumptions made above.

6.10 As Table 20 shows, as a revised supply, Warrington has 111.14 ha of employment land at present, in 18 sites. If sites not available to the broader market needs are also excluded, that supply drops to **104.53 ha** in 14 sites of which 34.85 ha in 11 sites represents the local supply and just over two thirds, 69.68 ha in three sites, represents the strategic (Omega) supply.

Table 20 – Warrington Land Supply Scenarios

Scenario	Cumulative Total Land Supply, ha	Comments
Baseline	231.87 (30 sites) <ul style="list-style-type: none"> Local: 82.25 Strategic (Omega): 149.63 	Reflecting the Council's Employment Land Sites Schedule, 31st March 2016
Baseline less land which will not be brought forward for development, will be developed for non B-Class uses or where development completed prior to 31st March 2016. (Revised Supply)	111.14 (18 Sites) <ul style="list-style-type: none"> Local: 35.47 Strategic (Omega): 75.67 	Reflects site research in Table 24
Baseline less land which will not be brought forward for development, will be developed for non B-Class uses or where development completed prior to 31st March 2016. Also land to be developed for the exclusive need of individual firms (Realistic Supply)	104.53 (14 Sites) <ul style="list-style-type: none"> Local: 34.85 Strategic (Omega): 69.68 	Reflects site research in Table 24, plus a further deduction to discount sites not available to the broader market.

Source: WBC and BE Group 2016

6.11 In Table 21 there is an analysis of the realistic supply, as defined above, by location and availability. As noted, the assessment of timescale is based upon a number of factors – market demand, overview (from discussions with stakeholders and site owners), planning status, infrastructure and services required.

- 6.12 The first point to note is that only two sites currently have premises under construction which will deliver new build options to the open market in the remainder of 2016. These comprise the 33,000 sqm 'Prime@Omega' logistics unit on Plot 7C Omega South and a modest light industrial development on Site 336: Land off Bewsey Road. Once the latter is complete, the land supply in, and around, Warrington Town Centre is negligible.
- 6.13 At the strategic level, this study estimates a ten-year supply of land remaining at Omega, although it is likely that the main B2/B8 development plots within the employment area will have been taken up well before that.
- 6.14 Over the next five years the main take up of local employment land is expected to be in Birchwood. Three units have been delivered at Site 367: The Quadrant (South), Birchwood Park. The provision of further units here appears likely within a five-year timeframe. Take-up of all the remaining plots within Birchwood Park is likely to be a long term process, particularly as no speculative development is proposed at this time. This study assumes that completion across all the six plots in the part will require in excess of ten years, indeed 15 years is estimated by Birchwood Park managers Patrizia. The recently acquired Enterprise Zone status will, however, provide some incentive for more immediate completions.

Table 21 – Location and Availability Assessment (Realistic Supply)

Location	Availability, years				Total, ha
	0 – 1	1 – 5	6 – 10	10+	
Birchwood	-	2.11	-	11.66	13.77
Lingley Mere	-	-	5.97	-	5.97
Sankey	-	-	7.5	-	7.5
Warrington Central/ Town Centre	0.15	-	0.05	-	0.2
Westbrook	-	-	7.41	-	7.41
Local, Sub-Total	0.15	2.11	20.93	11.66	34.85
<i>Strategic (Omega)</i>	<i>7.65</i>	<i>35.76</i>	<i>26.27</i>	<i>-</i>	<i>69.68</i>
Total, ha	7.8	37.87	47.20	11.66	104.53

Source: BE Group 2016

- 6.15 Around two thirds of the local supply is likely to be taken up in a 6-10 year timeframe. This includes local businesses park schemes such as Site 309: Forrest Way Business Park, Forrest Way and Site 365: Gemini 8 Retail Park, Charon Way,

Westbrook. This reflects a lack of historic delivery in these locations, and in the case of Forrest Way, the fact that the scheme is on hold pending major infrastructure investment in the local area.

- 6.16 At Lingley Mere, the focus is on delivery of the recently consented housing scheme. Further B-Class development is unlikely in the short term, but development of a speculative B2/B8 unit is proposed in the medium term.
- 6.17 Land is divided between four types of uses – B1(a) Offices, B1(c)/B2 Industry, B8 Warehousing and a mix of these (see Table 22). In the case of Omega, a fifth category, Strategic B2/B8, is added. It is broadly assumed that most ongoing take up at Omega will be for larger B2 or B8 options, although some land at Omega Phases 1 and 2 Remainder is also proposed for smaller B1 uses, primarily offices. Based on the latest Outline consent, some 19 ha, just over a third of the remaining supply is proposed for B1 uses. However, it is likely that the final development will be much smaller than that, reflecting ongoing demand for B2/B8 options and prospects for non B-Class uses here.

Table 22 – Use Class Assessment (Realistic Supply)

Location	Use Class					Total, ha
	B1(a)	B1(c)/B2	B8	B1, B2, B8	Strategic B2/B8	
Birchwood	4.54	5.57	3.66	-	-	13.77
Lingley Mere	2.64	0.36	2.97	-	-	5.97
Sankey		3.75	3.75	-	-	7.50
Warrington Central/ Town Centre	0.05	0.15	-	-	-	0.20
Westbrook	4.23	-	-	3.18	-	7.41
Local, Sub-Total	11.46	9.83	10.38	3.18	-	34.85
<i>Strategic (Omega)</i>	<i>19.00</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>50.68</i>	69.68
Total, ha	30.46	9.83	10.38	3.18	50.68	104.53

Source: BE Group 2016

- 6.18 In terms of the local supply, around a third is likely to deliver primarily B1(a) offices. This includes some 4.30 ha at Birchwood Park, based on current owner intentions. As noted, full completion here, and at Lingley Mere, is likely to be a longer term prospect. The other main sources of office land are at Westbrook including 2.03ha at Site 356: Gemini 8 Retail Park, Charon Way and 2.20 ha 36c: Gemini 16, Westbrook. The latter assumes access constraints on this site can be overcome.

- 6.19 This exercises also illustrates the negligible supply of consented office development land in Warrington Town Centre. At the time of writing only 0.05 ha at 360: Land at Stanley Street is available, with consent for a for a 1677 sqm, five-storey office building.
- 6.20 28.2 percent of the local supply is likely to be developed for B1(c)/B2 industry. Again, there is a high dependence on delivery in Birchwood and, to a lesser degree, completions at 309: Forrest Way Business Park, Forrest Way. As noted, the latter will not now come forward until strategic road improvement proposes in the area are implemented. The supply elsewhere is limited.
- 6.21 29.8 percent of the supply is likely to provide local scale B8 warehousing. Again, this includes options at Birchwood Park although some further delivery at 367: The Quadrant (South), Birchwood Park is likely in the short to medium term. Elsewhere the main options are at Lingley Mere and Forrest Way Business Park, both of which are unlikely to come forward in less than 6 years.
- 6.22 A further 3.18 ha at 356: Gemini 8 Retail Park, Charon Way, Westbrook is proposed for a mix of B-Class uses, focused on industrial and office options.

Sites Quality

- 6.23 All sites in the realistic supply have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of a 100, made up of ten individual measures, each scored out of ten. These are: proximity to the strategic highway network, proximity to key local routes, prominence, access to public transport, planning status, access to services, constraints, environmental setting, flexibility and availability. The scoring system and the detailed scores are provided in Appendix 4 and 5.
- 6.24 Two scores are provided in Table 23 a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic and key local highway proximity, prominence environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site.

- 6.25 Generally, the remaining sites an Omega score well, reflecting their size, flexibility, proximity to the M62 and reasonable prospects for further delivery in the short/medium term. Land at Birchwood Park also scores well, reflecting the quality and accessibility of the location, even if large scale delivery may prove a longer term prospect.
- 6.26 Site 309: Forrest Way Business Park, Forrest Way is the worst scoring overall. This reflects the low quality and backland nature of the identified land. It also reflects the reality that development here is unlikely to be brought forward until major local infrastructure improvements have been completed.

Table 23 – Employment Sites Scoring (Realistic Supply)

Site Ref.	Name	Revised Size, ha	Score, max 100	Market -led Sub-total
Omega 7C	Plot 7C Omega South	7.65	78	33
Omega 1 4(L)	Omega North - Parcel 4(L)	2.06	76	40
381	Plots 107, 501-502, 611-612, 701-702 and Quadrant, Eastern Edge, Birchwood Park	11.66	75	37
336	Land off Bewsey Road	0.15	74	26
367	The Quadrant (South), Birchwood Park	1.87	74	32
-	Omega Phases 1 and 2 Remainder	26.27	71	46
357	Phase 1 Remainder - Lingley Mere	2.35	70	36
356	Gemini 8 Retail Park, Charon Way, Westbrook	5.21	66	33
360	Land at Stanley Street	0.05	64	32
15 A(c)	Phase 3 - Lingley Mere	3.62	64	38
Omega Zone 7 Remainder	Omega South - Zone 7	33.70	63	35
382	Benson Road, Birchwood	0.24	59	20
36c	Gemini 16, Westbrook	2.20	52	29
309	Forrest Way Business Park, Forrest Way	7.50	47	22

Source: BE Group 2016

Employment Areas Assessments

- 6.27 BE Group has reviewed a total of 14 Employment Areas across Warrington (Table

25). These are the main industrial estates and business parks of the Borough, as identified in the Core Strategy Proposals Map under Policy PV1 'Development in Existing Employment Areas'. Also considered is Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn which is an established Employment Area in the Borough although not included under Policy PV1 due to its rural/Green Belt position. Forrest Way Business Park is included under Policy PV1, but as an undeveloped employment site it is considered as part of Warrington's employment land supply, discussed above.

6.28 The Omega Strategic Site is discussed above in relation to the remaining undeveloped land and further considered further elsewhere in the study.

6.29 Each area has been appraised and assessed through a combination of site visits, local intelligence, consultations with some owners and the views of those involved in the local property market. The analysis includes the following:

- The 'Area' contains the local authority's designated title for the area/site
- A brief 'Description' in the form of the consultancy team's comment on the area, including the main use classes.
- The size in hectares is also provided
- Vacant land is identified, as is the scope for remodelling of properties or sites. Expansion possibilities are also included. These are identified, for simplicity, as 'Opportunities for redevelopment/expansion'. However, in most cases, where an Employment Area is functioning well and most land/property is in use, there may be no such opportunities.
- The 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. These are described in Table 29
- Finally, recommendations/actions for the future role of the area are set out.

6.30 Overall, there is a local supply (i.e. excluding Omega) of 644.87 ha of developed land in, or with potential for, B1/B2/B8 uses in Warrington Borough. This reduces to 579.05 ha if Barleycastle Trading Estate/Stretton Green Distribution Park are excluded.

6.31 The strategic developed/undeveloped land supply at Omega comprises another 194.18 ha once land now consented for housing is excluded. This comprises:

- Omega North is 50.70 ha

- Omega South is 143.48 ha.

Table 24 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect in the Local Plan Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible
E		

Source: BE Group 2016

- 6.32 Looking at the local Employment Areas only, 294.21 ha (45.6 percent) is in East Warrington, including 178.8 ha in Birchwood (incorporating Olympic Park, west of the M6) and 108.8 ha at Woolston Grange. Between Junctions 8 and 9, M6 another 96.77 ha (15.0 percent) is found at Gemini, Westbrook and 80.90 ha (12.5 percent) at Winwick Quay.
- 6.33 Inevitably, the quality of premises in Warrington's Employment Areas varies but all are well occupied and there are no large areas of dereliction. Where land/premises have historically stood vacant, take up for alternative uses has usually followed quite rapidly. Holmsfield Road/Howley Lane (Howley Quay), Howley is a strong example of this.

Table 25 – Employment Area Summaries

Area	Size, ha	Description and Use Classes	Opportunities for Redevelopment/ expansion	Grading	Recommendations
Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn	65.82	Two adjacent established, rural employment areas, comprising premises of a range of quality levels and ages, from 1940s-2000s. Includes several large scale distribution units benefitting from the nearby M6/M56 access. Also, incorporates a range of smaller industrial premises in the north west, along Lyncastle Way and construction/storage yards in the south, along Lyncastle Road. The two estates represent the only large, multi-let employment area in South Warrington. B1/B2 and primarily B8	Some older buildings in Barleycastle Trading Estate are reaching the end of their economic lives and could be subject to redevelopment/major refurbishment. However, the main growth opportunities are likely to be found in the development of the open storage yards in the south. Expansion outside the current employment area boundary is limited by the Green Belt designation of surrounding land.	B	Protect strongly in the Local Plan as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Reflecting the current limited prospects for expansion, support schemes which would improve and/or intensify the current property offer.
Birchwood (incorporating Birchwood Park)	152.4	Established high quality regional office park with an emphasis on energy and high tech uses. Also incorporates mostly modern B2/B8 industrial areas at Trident Business Park in the north and the Former Risley Employment Area in the east. B1/B2/B8	In addition to the identified development plots in Birchwood Park, opportunities for redevelopment/major refurbishment exist within the older, former MoD properties of Trident Business Park. Further expansion limited by surrounding residential and nature conservation uses, along with the M62 Motorway to the north.	A	Protect strongly in the Local Plan as key regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Further investment in local/strategic road infrastructure should be supported.
Birchwood Boulevard	17.55	Mix of larger HQ office buildings and smaller self-contained properties, accessed from a central boulevard and adjacent to Birchwood Shopping Centre. B1(a)	Location is at capacity and bounded by other uses.	B	Protect strongly in the Local Plan as key local/regional employment area for B1(a) (and appropriate ancillary) uses.
Bewsey Road	4.19	Small, edge of centre industrial area, primarily serving the local market. B2/B8	Limited opportunities for infill exist and these are generally being taken up by local landowners. Further expansion is limited by surrounding uses.	C	Protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses.
Centre Park	30.82	Modern office park, incorporating a small number of warehouse options and A3/C1 hot food and hotel uses around the entrance. B1(a)/B8	Further expansion land is largely proposed for leisure uses.	B	Protect strongly in the Local Plan as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Support opportunities for local road improvement which may emerge from the Southern Gateway and

Area	Size, ha	Description and Use Classes	Opportunities for Redevelopment/ expansion	Grading	Recommendations
					Warrington Waters schemes.
Gateway 49, Bewsey	3.86	Small, modern edge of centre B8 trade park. B8	Location is at capacity and bounded by other uses.	C	Protect in the Local Plan as local employment area B8 (and appropriate ancillary) uses.
Gemini, Westbrook	96.77	High quality mixed employment area, providing a range of industrial/warehouse options and smaller office schemes. Most property is modern and completed in the last 20 years. The area incorporates several larger retail and motor retail properties around Europa Boulevard. B1/B2/B8	The main expansion areas – Gemini 8 and Gemini 16 – are long established but have been degraded by land losses to alternative uses. The remaining land should be protected to meet local need for B-Class uses in north and west Warrington.	B	Protect strongly in the Local Plan as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Further refinement of the policy mapping could exclude areas in A1-A4 retail and hot food uses along with Sui Generis motor retail locations.
Holmsfield Road/Howley Lane, Howley	10.46	Group of older, 30-50 years old, industrial properties, comprising a mix of terraced light industrial/trade premises and larger warehouse premises in an edge of centre location and serving the local market. Access is constrained in places and the area is increasingly constricted by encroaching residential development. B1/B2/B8	Most land east of Padgate Brook has now been lost to housing, as has the Howley Quay site to the south west. This removes the main development plots at this location. Over the long term, questions remain about the viability and need to retain other small employment sites on the edge of this area.	C/D	Generally, protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. However, not to the exclusion of other growth opportunities to meet identified needs.
Lingley Mere	39.37	High quality, office park, primarily providing HQ office facilities for United Utilities. B1(a)	Over half the remaining development land here has now been lost to housing. It is therefore important to protect the remaining 5.97 ha, identified above, to meet long term needs for B-Class premises here.	B	Protect strongly in the Local Plan as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses.
New Cut Lane, Woolston	6.61	Small backland industrial area, comprising terraced industrial units and open storage/waste processing sites. Location sits behind housing but retains reasonable A57 access. B1/B2/B8	Modest infill options exist on several open storage sites along New Cut Lane. Expansion is constrained by adjacent housing and a nature conservation site to the south.	C/D	Generally, protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. However, not to the exclusion of other growth opportunities to meet identified needs.
Novelis,	15.36	Large, single occupier B2 industrial site,	Opportunities for growth are presently	B/C	Protect in the Local Plan as major

Area	Size, ha	Description and Use Classes	Opportunities for Redevelopment/ expansion	Grading	Recommendations
Latchford		comprising a number of large manufacturing and waste processing buildings. Land to the west has recently been developed for housing. B2/B8	limited to infill opportunities to meet the needs of Novelis only.		facility for a key regional/national employer. However, should that occupier vacate, it is unlikely that a new single occupier will be found for this older specialist site. Under such circumstances opportunities for redevelopment, to meet a range of needs, should be considered.
Olympic Park, Birchwood	8.85	High quality office park, including some larger HQ facilities for public sector occupiers. The area has seen recent completions and is now fully developed. B1(a)	Location is at capacity and bounded by other uses.	B	Protect strongly in the Local Plan as key local/regional employment area for B1(a) (and appropriate ancillary) uses.
Phipps Lane, Burtonwood	3.11	Small, rural employment area within the Burtonwood village boundary. Comprises mostly poor quality, older industrial and storage properties. B1/B2/B8	In the long term the whole location may represent a redevelopment opportunity, to meet a range of needs appropriate to this small settlement location.	D	Generally, protect in the Local Plan as local employment area for B1/B2/B8 (and appropriate ancillary) uses. However, not to the exclusion of other growth opportunities to meet identified needs.
Winwick Quay	80.90	Large area of modern, primarily industrial premises, in developed from the 1980s onwards. Comprises a mix of terraced and standalone properties. The area benefits from direct A49 access, linking to the M62 in the north. This prominence has encouraged the development of a trade and car showroom offer in the area. South of Cromwell Avenue, the Former Fiat Warehouse now being developed for terraced retail. This represents a loss of 5.31 ha of employment land although some further land does remain available within this part of the Employment Area. As is discussed above, Site 365: Calver Park, Calver Road is also now proposed for Sui Generis motor retail use. B1/B2/B8	Further opportunities for refurbishment/small scale redevelopment exist, particularly at Bishops Court. Also areas of land which remain in B-Class use around the former Fiat Warehouse.	B	Protect strongly in the Local Plan as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses. Support schemes which would improve and/or intensify the current property offer. Further refinement of the policy mapping could exclude land south of Cromwell Avenue now lost to retail uses and, assuming development takes place as discussed, Site 365: Calver Park, Calver Road.
Woolston	108.8	The second largest employment area in	While modest opportunities for	A	Protect strongly in the Local Plan

Area	Size, ha	Description and Use Classes	Opportunities for Redevelopment/expansion	Grading	Recommendations
Grange		Warrington with M6 visibility and access. The area is dominated by several large logistics operations in the south and east, with smaller terraced units west of Hardwick Grange. B1/B2/B8	refurbishment may exist, the area is generally densely occupied with no large-scale redevelopment or expansion opportunities.		as key local/regional employment area for B1/B2/B8 (and appropriate ancillary) uses.
Total	644.87				

Source: BE Group 2016

6.34 The supply of readily available brownfield land, within the boundaries of the 14 Employment Areas is limited. However, looking at the long term, research has identified several 'redevelopment opportunities' which have the potential to provide at least some 'windfall' employment sites which could meet an element of need. Excluding land with consent for B1/B2/B8 employment use which has already been identified in Table 25 above, these are:

- Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn – Some older buildings in Barleycastle Trading Estate are reaching the end of their economic lives and could be subject to redevelopment/major refurbishment. However, the main growth opportunities are likely to be found in the development of the open storage yards in the south of the area, along Lyncastle Road
- Birchwood (incorporating Birchwood Park) – Birchwood Park includes several high profile development plots. However, in the long term local level brownfield opportunities may be provided with the redevelopment of older premises at Trident Business Park
- Centre Park – In the long term the Spectra Business Park building may provide an expansion opportunity, although it remains well used at this time
- Holmsfield Road/Howley Lane, Howley – Reflecting recent development patterns, further redevelopment opportunities may exist on peripheral sites here that could meet a range of needs
- New Cut Lane, Woolston – Modest infill options exist on several open storage sites along New Cut Lane. In the long term, the area may represent an opportunity for investment and change
- Novelis, Latchford – This site accommodated a major occupier and should be protected accordingly. Should that occupier ever vacate, the site would represent a strong redevelopment opportunity, to accommodate a range of uses
- Phipps Lane, Burtonwood – In the long term the whole location may represent a redevelopment opportunity, to meet a range of needs appropriate to this small settlement location
- Winwick Quay – Some land remains in B-Class use around the former Fiat Warehouse, south of Cromwell Road.

Summary

6.35 An update of the Council's Employment Land Sites Schedule confirms that there are

30 sites totalling 231.87 ha. This comprises a local supply of 82.24 ha in 23 sites (35.5 percent of the floorspace total), a strategic supply of 149.63 ha in seven sites at Omega (64.5 percent). However, an assessment of this supply, excluding land now developed, unlikely to be brought forward, completed for alternative uses or held for specific occupiers suggests a more realistic figure of **104.53 ha** in 14 sites, comprising:

- Local: 34.85 (11 sites)
- Strategic (Omega): 69.68 (3 sites).

6.36 Of that remaining supply, 7.80 ha, primarily at Omega is currently under construction, with ongoing take up, over the next five years likely to be focused at Birchwood. Around two thirds the local supply is likely to be taken up in a 6-10 year timeframe. Only at Birchwood is a significant portion of the land supply expected to remain available for more than a decade. Table 26 provides a breakdown of the current realistic land supply by B Use Class.

Table 26 – Use Class Assessment (Realistic Supply)

Location	Use Class					Total, ha
	B1(a)	B1(c)/B2	B8	B1, B2, B8	Strategic B2/B8	
Local, Sub-Total	11.46	9.83	10.38	3.18	-	34.85
<i>Strategic (Omega)</i>	19.00	-	-	-	50.68	69.68
Total, ha	30.46	9.83	10.38	3.18	50.68	104.53

Source: BE Group 2016

6.37 A review of Warrington’s allocated employment areas indicates that most are established office and industrial areas, of good quality, which mix local scale premises and larger options for regional and national operators. Warrington’s flagship (A or B Grade) locations are:

- Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn – Key logistics location and prominent industrial area in South Warrington
- Birchwood (incorporating Birchwood Park), Birchwood Boulevard and Olympic Park – Collectively a major motorway related office park or regional significance
- Centre Park – Key Central Warrington office park
- Gemini, Westbrook – High quality mixed employment area, providing a range of industrial/warehouse options and smaller office schemes

- Lingley Mere – High quality office park headquartering a major national company
- Woolston Grange – The second largest employment area in Warrington with M6 visibility and access. The area is dominated by a number of large logistics operations in the south and east.

6.38 At present, most of the Employment Areas are well occupied, with no large areas of void premises, even in budget quality schemes. Over the Local Plan period, there are a number of potential redevelopment/regeneration opportunities, which might deliver additional land supply, should it be required. Although it is not possible to state exactly how much brownfield land may be released in this way, the Council could usefully look in the following Employment Areas for small scale opportunity sites:

- Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn – With a focus on open storage yards, along Lyncastle Road.
- Birchwood (incorporating Birchwood Park) – Trident Business Park may ultimately provide some redevelopment opportunities
- Centre Park – Consider the long term future of Spectra Business Park
- Holmsfield Road/Howley Lane, Howley – Further redevelopment opportunities may exist on peripheral sites
- New Cut Lane, Woolston – Modest infill options exist along New Cut Lane. Long term regeneration planning should consider if the whole area represents an option for change
- Phipps Lane, Burtonwood – Long term regeneration planning should consider if the whole area represents an option for change
- Winwick Quay – Some land remains in B-Class use around the former Fiat Warehouse, south of Cromwell Road.

6.39 However, these are caveated in that, with some exceptions, owner/developer aspirations for B1/B2/B8 development on these sites has not been tested.

7.0 FUNCTIONAL ECONOMIC MARKET AREA

Introduction

- 7.1 This section defines and reviews the Functional Economic Market Area (FEMA) of Warrington. It also looks in more detail at some of the neighbouring local authority areas, which fall within that FEMA area and which may compete with the Borough for strategic level property requirements. This is undertaken in recognition that the Warrington economy does not operate in isolation, but rather it has intricate and important relationships with neighbouring areas.

Functional Economic Market Area – Quantitative Evidence

- 7.2 The guidance for Housing and Economic Development Needs Assessments produced by the Department for Communities and Local Government includes guidance for the definition and consideration of a FEMA. The guidance states:

“The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply – often referred to as the functional economic market area. Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:

- *Extent of any Local Enterprise Partnership within the area*
- *Travel to work areas*
- *Housing market area*
- *Flow of goods, services and information within the local economy;*
- *Service market for consumers*
- *Administrative area*
- *Catchment areas of facilities providing cultural and social well-being*
- *Transport network.”*

- 7.3 All definitions of a functional economic market area are approximations of the interrelationships of a local economy with areas outside the local authority. The FEMA cannot account for all relationships in the economy, rather it is a representation of the key economic, workforce and consumer flows for the local economy.

7.4 Warrington's economy clearly does not operate in isolation. The quantitative evidence base that influences the definition of the Borough's FEMA is considered here.

Local Enterprise Partnership

7.5 Warrington falls within the Cheshire and Warrington LEP, along with Cheshire West and Chester and Cheshire East. This reflects Warrington's historic links to Cheshire, but also very significant economic interrelationships as is shown in the commuting data below. Recently this has been expressed in the designation of the Cheshire Science Corridor as an Enterprise Zone, linking sites in Birchwood with Alderley Park in Cheshire East and Thornton Science Park/Sites in Ellesmere Port in Cheshire West and Chester.

7.6 However, as the commuting data also shows, Warrington's major economic links extend beyond Cheshire. For example, the Cheshire Science Corridor Enterprise Zone, excludes Sci-Tech, Daresbury, Halton. This is a key science and technology facility for the North West, which sits on Warrington's western boundary, and draws significant labour from Warrington Borough (see below), but which falls outside of the Cheshire and Warrington LEP area. Clearly therefore a definition of Warrington's FEMA must look beyond the Cheshire and Warrington sub-region.

Travel to Work Area

7.7 The commuting patterns of the working residents of Warrington and the workforce employed in the Borough are important in understanding the housing and employment role of Warrington in the context of the broader region. This has implications for the definition and understanding of Warrington's FEMA.

7.8 Table 27 summarises the in and out commuting patterns of Warrington as at the time of the 2011 Census. The net flows to and from each area are also summarised and show that overall, Warrington is a sizable net importer of labour. In 2011, 14,565 more workers commuted into the Borough from across England and Wales than left to work elsewhere.

7.9 When considering Warrington's relationship to individual local authority areas, Warrington has a positive net flow of workers (i.e. many more workers commuting into the Borough than out of it to/from an area) with neighbouring Wigan in Greater Manchester, St Helens and to a lesser degree Halton in the Liverpool City Region,

and Cheshire West and Chester.

- 7.10 By far the largest negative flows (i.e. more residents going out of the Borough to work than coming in) are with Manchester and neighbouring Trafford, where Trafford Park, east along the M62/M602 is clearly a strong draw. More surprisingly though, Warrington has a positive commuter flow with the City of Liverpool in that, as of 2011 at least, 563 more workers commuted from Liverpool to Warrington to work than left Warrington to work in Liverpool.

Table 27 – In and Out flows of Warrington Commuters

	Work Locations of Employed Residents of Warrington OUTFLOW	Origins of Warrington Workers INFLOW	Net Flow of Workers into Warrington
Manchester	4,232	1,804	(2,428)
Trafford	3,226	1,876	(1,350)
Liverpool	2,628	3,191	563
St. Helens	2,516	6,804	4,288
Cheshire West and Chester	2,462	3,894	1,432
Salford	2,155	1,738	(417)
Cheshire East	2,005	2,073	68
Wigan	2,000	6,539	4,539
Knowsley	1,124	1,430	306
Stockport	801	1,005	204
Bolton	525	1,236	711
Sefton	406	1,246	840
West Lancashire	396	626	230
Wirral	382	1,156	774
Bury	228	580	352
Tameside	226	492	266
Rochdale	209	420	211
Oldham	204	423	219
Preston	199	254	55
South Ribble	193	363	170
Chorley	149	496	347
Blackburn with Darwen	148	208	60
Elsewhere in England and Wales	3,519	5,532	2,013
Total	85,029	99,594	14,565

Source: ONS 2011 Census

- 7.11 A strong relationship, in terms of both in and out commuter flows is also noted with

Cheshire East and Salford.

- 7.12 In terms of longer distance (likely) rail commuting it can be noted that 108 Warrington residents reported a commute to Westminster or the City of London in 2011. 17 Inner London residents indicated that they travelled north to Warrington to work. 73 residents reported a shorter commute to Birmingham, while 97 Birmingham residents travelled north to work in Warrington. Based on the same data, commuting north, to and from Glasgow and Edinburgh, appears negligible.
- 7.13 Overall, some 50.6 percent of Warrington's workforce also reside in the Borough. Conversely, 59.3 percent of the employed residents of Warrington also work in the Borough.
- 7.14 In terms of defining the FEMA, it can be seen that that Warrington has strong economic linkages – which can be defined as more than 3,000 commuter movements, in and out of the Borough, to or from that location – with neighbouring Wigan, Manchester, Trafford and Salford in Greater Manchester. In the Liverpool City Region, 10,460 people moved between Halton and Warrington to work in 2011, the largest commuter flow overall. Another 9,320 moved between St Helens and Warrington. A strong, positive, relationship is also noted with the City of Liverpool, equating to 5,819 commuter movements in 2011. Relationships with Cheshire are strong, but do not outweigh connections with the areas of Greater Manchester and the City Region highlighted above – 6,356 commuter movements between Warrington and Cheshire West and Chester were recorded in 2011, 4,078 between Warrington and Cheshire East.

Housing Market Area

- 7.15 The latest Strategic Housing Market Assessment (SHMA) was published in January 2016 for a Mid Mersey Housing Market Area (HMA) incorporating Halton, St Helens and Warrington local authority areas. That study analysed past research, house price trends and dynamics, commuting flows and migration patterns, to define the HMA.
- 7.16 In market-terms there is reasonable alignment in terms of house prices in Halton, St Helens and in urban areas of Warrington. The greatest variation is at Lymm, where local prices are well above HMA averages. Travel to Work Area and Migration data shows a degree of self-containment, within, and across the three local authority areas which is consistent with a defined HMA. There is also well established Duty to

Co-operate joint working between the three local authorities on strategic housing issues. It should also be noted that the Cheshire and Greater Manchester authorities have now well established, separate, HMAs.

Market Comments

- 7.17 Property market stakeholders identify that there is a strong linked market between Warrington and Halton for industrial premises of 2,000-5,000 sqm. Occupiers will frequently have an area of search for premises that extends across Warrington, Runcorn and Widnes. Birchwood, and to a lesser degree Warrington Town Centre is also in competition with key North West centres such as Manchester and Liverpool for larger office requirements. In terms of logistics, Omega competes for requirements at the regional and, on occasion, national level. In the future large logistics sites in Warrington will have more immediate competition as equivalent locations in St Helens and Knowsley are brought forward.

Services and Infrastructure

- 7.18 Three national motorways pass through Warrington Borough. In the north the M62, provides a direct east-west link into the heart of the Liverpool and Manchester Conurbations. In the south, the M56 provides a second east-west link, accessing south Manchester and Manchester Airport in the east. In the west, the M56 moves into North Wales, with links to Ellesmere Port/Wirral and Chester. However, its most immediate utility is the close, high speed link it provides to Daresbury and Runcorn, in Halton, a key factor in the close economic relationships between Halton and Warrington highlighted elsewhere in this study.
- 7.19 Running north-south, the M6 is clearly a national route. However, in the immediate Warrington context it provides a strong link north to St Helens (notably Haydock) and Wigan. To the south it provides access to the settlements of east and central Cheshire. The A49 passes through the heart of Warrington town and provides further access options, north to St Helens and Wigan and south through Cheshire and into the West Midlands.
- 7.20 Warrington settlements south of the Manchester Ship Canal are further served by the A56, which provides additional links west to Daresbury, Runcorn and west Cheshire and east into Manchester.
- 7.21 In terms of services, Warrington Town Centre is a significant sub-regional centre

serving all of Warrington Borough and also supporting adjacent settlements such as Runcorn and Newton-le-Willows. The scale of the town's catchment in the wider region is however limited by the catchments of the three regional centres - Chester, Liverpool and Manchester, the Trafford Centre and, to a lesser extent, the competing centres of Wigan, Northwich, Widnes and St. Helens.

- 7.22 Based on the above evidence, the FEMA for Warrington clearly includes Halton and St Helens, with 10,460 and 9,320 commuter movements recorded to and from those settlements in 2011. Those local authority areas also form a defined HMA with Warrington. Smaller, but still significant commuting relationships can also be seen with neighbouring Wigan, Trafford and Salford in Greater Manchester. Also with Cheshire West and Chester and Cheshire East, which form a LEP area with Warrington. Finally, Warrington is a sizable net exporter of labour to the City of Manchester and a modest importer of labour from Liverpool.
- 7.23 The other areas of the Liverpool City Region (including Knowsley) and Greater Manchester have been excluded due to their lower relationships with Warrington. As mentioned previously, the FEMA should incorporate the key relationships, rather than all relationships. Warrington has a relationship with all these locations and there would be individual businesses within the Borough that would consider at least some of them as part of their core client base. However, overall the relationship is weaker than with the other locations shown above.

Neighbouring Areas

- 7.24 Para 160 of the NPPF states that local planning authorities should have a clear understanding of business needs within their local economic markets, by working with county and neighbouring authorities to prepare and maintain a robust evidence base about business needs and likely market changes.
- 7.25 Having initially defined the FEMA for Warrington, the remainder of this section considers each of the districts which fall within that area on an individual basis. Accordingly, discussions have been undertaken with stakeholders in relation to these adjoining market areas, specifically Wigan, Manchester, Trafford and Salford in Greater Manchester; Halton, St Helens and Liverpool in the Liverpool City Region and Cheshire West and Chester/Cheshire East.

Cheshire

Cheshire West and Cheshire

- 7.26 The Cheshire West and Chester Local Plan was adopted on the 29th January 2015 and forms part of the statutory development plan for the Borough. The Local Plan will be developed in two parts, Part One Strategic Policies and Part Two Land Allocations and Detailed Policies. Key Local Plan targets are that over the period of 2010 to 2030 the Plan will deliver at least 22,000 new dwellings and 365 ha of employment land. The majority of new development will be located within or on the edge of the city of Chester and towns of Ellesmere Port, Northwich and Winsford.
- 7.27 Cheshire West's latest Employment Land Study Update was completed in 2013 to assess the supply and demand of employment land within Cheshire West and Chester. It provided a review and update of the Employment Land and Premises Study completed by BE Group in 2009. The 2013 study identified a realistic employment land supply of 315.7 ha.
- 7.28 57.7 percent of that supply, 182.26 ha, was located in Ellesmere Port which links to Warrington via the M56/M53 Corridors. However, around half that supply is located at Ince Marshes and focused around the Resource Recovery Park, refinery and Energy from Waste facility. Development here will mostly be for specialist energy generation, chemicals and environmental technologies uses, with limited potential to compete with Warrington outside of these sectors.
- 7.29 Land elsewhere in Ellesmere Port is also focused in certain heavy industry sectors including automotive, chemicals and port related. This includes land and property around Thornton Science Park forms part of the Cheshire Science Corridor Enterprise Zone, along with sites at Birchwood Park and Alderley Park in Cheshire East. The focus at Thornton is on energy generation and related engineering, which links to the nuclear/engineering focus of Birchwood
- 7.30 Chester is an established sub-regional office location which does compete with Warrington for service occupiers, particularly financial services. Office premises are concentrated at the Chester Business Quarter in the City Centre and Chester Business Park to the south. Chester Business Quarter incorporates a major regeneration project adjacent to Chester rail station. It has the potential to deliver some 50,000 sqm of high quality office stock over several buildings and development

phases to 2028. Construction of the project has commenced, with the Grade A One City Place constructed and launched to the market in early 2016.

- 7.31 Extending across 71 ha, Chester Business Park offers some 120,000 sqm of good quality premises. High-profile occupiers include Bank of America, Marks and Spencer Money and Royal Bank of Scotland. However, there is little land remaining for future development here. Chester's supply of viable industrial land is negligible and it is expected that further industrial sites will need to be sought over the Plan period, with areas of search potentially extending west into Flintshire.
- 7.32 Northwich and Winsford are home to sizable business parks and industrial estates including Gladbrook Park and the now largely complete Cheshire Business Park in Northwich alongside Winsford 1-5 Industrial Estate. All compete in the sub-regional market and have attracted a mix of local and regional occupiers. There is modest further growth potential at Winsford 1-5 Industrial Estate. Little land remains at Northwich, but the Local Plan Part Two will consider growth options delivering up to 40 ha of additional land in both towns.
- 7.33 As noted there is strong positive flow of workers, some 1432 at the 2011 Census, from Cheshire West and Chester into Warrington.

Cheshire East

- 7.34 Cheshire East's Local Plan Strategy underwent EiP hearings over 2015/16, with a recent period of further consultation over spring 2016. Hearings are expected to commence in September 2016. The overall growth proposition is to deliver over 36,000 new homes by 2030 and 20,000 jobs in the longer-term. Up to 380 ha of employment land is also proposed. Significant new employment areas are proposed to underpin the strategy at Basford, Crewe, Radway Green J16, M6 near Alsager, J17 at Sandbach, Middlewich, North Congleton, South Macclesfield and Worden.
- 7.35 The Cheshire East Employment Land Review (2012), identified employment land needs of 277.78-323.71 ha for the period 2009-2030. The existing employment land supply was 272.38 ha, suggesting an employment land shortfall of between 5.40 ha and 51.33 ha. There are a wide range of local schemes and proposals which may impact on the Warrington market, but locations with most significance are likely to include Midpoint 18, Middlewich; Crewe High Growth City and Alderley Park, near Macclesfield.

Midpoint 18 Business Park

- 7.36 Midpoint 18 is a major mixed use site, offering around 120,770 sqm of accommodation ranging from 45 sqm workspace units up to 35,000 sqm. Design and build opportunities are also offered by the developer, allowing occupiers to tailor a space around their requirements. Occupiers include Cygnet Integrated Solutions, SP Energy Networks and Genesys Manufacturing. A strategic site close to Junction 18, M6 it can be identified as a competitor to equivalent locations in Warrington. Pochin, managing agents on the scheme, are currently offering four land sites suitable for development. Plots are available in sizes from 464 sqm to 55,742 sqm.

Crewe

- 7.37 Over the long term, Crewe is identified as a 'High Growth City' and focus for investment and development, deriving particular benefits from the HS2 infrastructure proposed. More immediate strategic impact comes from Crewe Business Park, a high quality new development set on 27 ha of land. Current occupiers include Barclays, Fujitsu and Busch (UK). The Park offers a range of accommodation, from office space, to high-tech research and development facilities – all on up to 125 year leases.
- 7.38 Crewe Commercial Park is a further new development on approximately 102,000 sqm, and will offer a number of design and build distribution/warehouse units from 4,645 sqm to 69,677 sqm. The Commercial Park will provide a dedicated rail siding, and rail freight terminal offering direct access to the West Coast Main Line.

Alderley Park

- 7.39 The 161 ha life science research and development facility forms part of the Cheshire Science Corridor Enterprise Zone, along with sites at Birchwood Park. It has a focus on drug development and associated technology, a distinct offer from the nuclear/engineering focus of Birchwood
- 7.40 The site currently offers around 190,000 sqm scientific laboratory space, offices, restaurants, cafes, leisure facilities, conferencing space and is home to a cluster of over 150 businesses and approximately 3000 staff.
- 7.41 Commuter flows between Cheshire East and Warrington were at rough equilibrium at the time of the 2011 Census, with an outflow to Cheshire East of 2005 and an inflow to Warrington of 2073.

Greater Manchester

Manchester

- 7.42 Manchester's Core Strategy was adopted in July 2012. It sets a target of 200 ha of employment land between 2010 and 2027. 70 percent of this, 140 ha, is proposed for B1(a) offices with a focus on the City Centre and Manchester Airport employment areas. 16,500 new homes are also proposed.
- 7.43 Manchester City Centre is defined by extensive regeneration programmes which are boosting the commercial and retail/leisure offer. The broad areas of growth can be defined as:
- Civic Quarter: an area in the heart of the City Centre including the Town Hall, Central Library, Manchester Central, Great Northern Warehouse and the public spaces - Albert Square and St Peter Square. The Civic Quarter is the next phase of growth in the City Centre, providing a natural extension to the existing commercial area.
 - Mayfield: intended to be a Civil Service Campus providing 5,000 civil service jobs. The aim is to reuse the vacant Mayfield Station adjacent to Piccadilly, complementing the on-going enhancement of this part of the City Centre.
 - Spinningfields: a location for high value financial and professional services within the Regional Centre, offering high quality premises with large floorplates. The scheme began in 1995 with final completion expected by the end of the decade
 - The Corridor: is characterised by the redevelopment of the big institutions, namely, University of Manchester, Central Manchester and Manchester Children's University Hospital Trust. The area offers opportunities related to research and development linked to the big institutions. Major employment areas include Great Jackson Street and First Street but also smaller sites including the former BBC building and Manchester Science Park, a key regional centre for science and technology.
- 7.44 Manchester Airport includes an established and growing area for high technology industries, logistics, offices, warehousing and ancillary commercial facilities. This is generally referred to as Airport City, which received Enterprise Zone Status in 2011. Growth extending to some 50 ha is envisaged to 2027.

- 7.45 As noted, Warrington, is a large net exporter of labour into Manchester, with a net outflow of 2428 as of the 2011 Census.

Salford

- 7.46 The emerging Salford Local Plan remains at a relatively early stage of development and work has recently slowed however to allow progress of the Greater Manchester Spatial Framework, a full draft of which will be available later in 2016.

- 7.47 At the time of writing, the 2006 Unitary Development Plan (UDP) remains the primary DPD for Salford. This set out a target of 225.1 ha of employment land for the period 2004 – 2016. The key proposal within the was the 80.9 ha Barton Strategic Regional Site, a major mixed use development location between Eccles and Irlam, to the south of the A57 and immediately north of the Manchester Ship Canal.

- 7.48 Within this, and of relevance to Warrington is Port Salford. Part of the wider Peel holdings along the Manchester Ship Canal, Port Salford, is a £138 million development and the UK's only inland multimodal distribution park served by rail, road and short sea shipping. The scheme is expected to generate 10,000 jobs over a 15-year lifetime. The Port Salford National Import Centre comprises a 153,000 sqm warehouse facility with a container facility capable of handling 300,000 containers and 37 million freight pallets per year. Culina Group now occupy a warehouse on the site, while in August 2016 Peel sought consent for a 4698 sqm warehouse for Rhenus Group.

- 7.49 The large North Bank Industrial Estate in Cadishead may also draw labour from Salford. The 2011 Census indicates Warrington to be a modest net exporter of labour to Salford, with a net outflow, in 2011, of 417.

Trafford

- 7.50 The Trafford Local Plan: Core Strategy was adopted in January 2012. It proposes 190 ha of further employment land between 2008/09 and 2025/26.

- 7.51 Links between Trafford and Warrington will inevitably be focused at Trafford Park, which lies at the northern end of the Manchester Ship Canal and is Europe's largest industrial park. It is split into three sub areas: Wharfside in the east; the core industrial area in the centre; and that part in the west which surrounds the Trafford

Centre regional shopping complex. Some 40,000 are employed here in over 1400 companies. A net 15,000 more people come into Trafford to work every day, than those who travel out to work in other areas and Trafford Park provides the bulk of these jobs. This included 3,226 commuters from Warrington as of the 2011 Census.

7.52 Further growth in Trafford will be focused at five Strategic Locations:

- Pomona Island – A new mixed-use commercial and residential district to complement the offers of the city centre and Salford Quays / Mediacity:uk. It will include 800 homes and 10 ha of employment land
- Trafford Wharfside – Located on the south bank of the Manchester Ship Canal opposite Salford Quays, the area forms part of Mediacity:uk and includes the Manchester United Football Ground. It will include 900 homes and 10 ha of employment land
- Lancashire County Cricket Club Quarter – Proposals include an improved Cricket Club Stadium and 400 homes
- Trafford Centre Rectangle – The western part of Trafford Park with potential for 1,050 residential units and associated B1 space at ‘Trafford Quays’ along with 15 ha of employment land
- Carrington – Redevelopment of brownfield land around Carrington and Partington to create a 1,560 homes and 75 ha of employment land.

Wigan

7.53 Wigan Council consulted last year on an Allocations and Development Management Local Plan Development Plan Document (DPD). From there, it is working on the publication of a Further Consultation Draft to be published in mid-September, after which it will be submitted to the Secretary of State for EIP.

7.54 Wigan’s Core Strategy, adopted in September 2013, establishes a need for approximately 200 ha of employment land over 2011 and 2026, or 13-14 ha/year. This reduces to 196 ha with recent take-up.

7.55 Meeting this need is expected to be challenging for Wigan. Policy EM1 of the Allocations and Development Management Local DPD, establishes 5 major allocated sites which will satisfy one-third of the requirement:

- EM1.1: Land at Leopold Street, Pemberton, Wigan – 2.04 ha
- EM1.2: Land at Smithy Brook Road, Wigan – 14.42 ha
- EM1.3: Land at Landgate Lane, Bryn – 5.49 ha

- EM1.4: South Lancashire Ind. Estate Extension, Ashton-In-Makerfield – 32.92 ha
- EM1.5: Land at Chaddock Lane, Astley – 13.37 ha.

7.56 A further five 'Major Sites' will supplement this requirement, larger mixed use proposals including some employment allocations totalling 69 ha. Beyond this, an outstanding need of some 59 ha remains and it will have to be determined whether to proceed with an identified shortfall of employment land, or look towards a Green Belt release.

7.57 Of the Major Sites, Pocket Nook, off the A580 East Lancashire Road and west of Atherleigh Way, is of most relevance to Warrington. The proposal is for a 29 ha high quality business park and 350 homes. The site is viewed as deliverable, but there are questions about the willingness of the landowner to sell land. Market appraisals have been conducted on the land and they argue that there would be strong demand for this land should it go to market. A development mix is still to be determined but, the site, if delivered as envisaged, does have the potential to compete with key sites in Warrington, particularly nearby Birchwood.

7.58 Further development is proposed at South Lancashire Industrial Estate. This is recycled land at Ashton-in-Makerfield which boasts additional land for expansion on top of the units already in place. This expansion however would require highways infrastructure works. Further development in the Golborne area may be possible, but proposals remain undefined at this stage.

7.59 Wigan is the largest net importer of labour into Warrington with a positive daily flow of 4,539 as of the 2011 Census.

Liverpool City Region

7.60 It should be noted that a Strategic Housing and Employment Land Market Assessment for the City Region area is currently being produced, which will define sub-regional housing and employment land needs. However, the results of this study are not due to be published until autumn 2016.

Liverpool City Region Local Enterprise Partnership

7.61 The Liverpool LEP was consulted primarily in relation to the expanding Port of Liverpool, the associated Superport Liverpool Programme and its impacts on the

broader sub-regional economy.

- 7.62 At present, the 'Liverpool City Region Superport: Market Analysis Land and Property Study' (2014) is the most up to date evidence of the additional land needs emerging from port growth (i.e. some 400-500 ha above the 2014 sub-regional supply, see below). However, this study does not clarify how that need could be divided between the local authorities of the Liverpool City Region and beyond.
- 7.63 The need is for unconstrained sites, which can support premises of 10,000 sqm or more. Needs are likely to be split between B2 and B8 uses and accordingly there is the need for flexibility between these two uses in site allocations. When specific requirements emerge they are likely to be relatively urgent and it is felt that if a plot cannot be brought forward in less than 18 months it will not meet needs.
- 7.64 Peel Ports have been reviewing the current Port Estate with a view towards intensifying uses on land currently in port operation. The expansion of the port onto some adjacent land is likely, but the actual contribution this makes is likely to be negligible in terms of meeting needs. Ultimately, most need will be met outside of Liverpool and Sefton, in Knowsley, St Helens, West Lancashire (Skelmersdale), Wirral, Cheshire and Warrington.
- 7.65 The new port terminal is expected to double port throughput over the next 10-20 years. To account for this growth the LEP, supporting the Port Access Steering Group, is prioritising infrastructure investment in a range of transport modes extending out of the City Region. On the railways, port growth is expected to increase rail activity to 38 trains a day, with some impact on lines through Warrington.
- 7.66 The most direct impact for Warrington, aside from logistics demand is likely to be along the Manchester Ship Canal, where barge traffic is expected to reach 30,000 containers a day. This will have traffic impacts on relevant bridges and put greater emphasis on the growth and expansion of Port Warrington as well as on surrounding land, some of which is presently in the Green Belt.

Liverpool City Region SuperPort: An Analysis of the Supply of, and Demand for, Distribution Space within the Liverpool City Region – Liverpool LEP (2014)

- 7.67 This report examines the factors that it considers will drive demand for Port related employment land and premises (and associated uses), from investment in SuperPort

assets and capabilities, through to major changes in the global and national context. The report then goes on to examine the current and planned supply of sites in the current economic area of the Port that could meet this demand. The report examines land demand under two scenarios; a road freight dominated scenario (70 percent road, 5 percent rail, 25 percent sea/canal) and a scenario with a higher percentage of rail freight (50 percent road, 25 percent rail, 25 percent sea/canal) (see Table 28).

7.68 Therefore, the report states that there is an overall requirement for some 783-808 ha over the next 20 years. If wholly port based uses are excluded (i.e. Ro/Ro, Trade Cars, Non-Unitised Cargos and Complimentary Sectors – 228 ha, road scenario), the assessed net requirement is for 580 ha (road scenario) for logistics and manufacturing. Furthermore, the report states that the Economic Demand projection is based on historical evidence of the average demand for land in the study area region. That is, when looking at the uplift in demand from the port, this baseline should be excluded. Therefore, non-port-centric uplift over 20 years, which is of most relevance to Warrington, is projected to be the Secondary Demand of 340 ha (road scenario).

Table 28 – Overall Demand for Additional Land

	Estimated Demand for Additional Land, ha				
	0-5 Years	6-10 Years	11-15 Years	16-20 Years	Total
Economic Demand	60	60	60	60	240
Port-Centric Warehousing					
Scenario 1 - Road	13	14	11	16	54
Scenario 2 - Rail	11	10	5	13	39
Roll on/Roll off	8	8	8	8	32
Cars	3	3	3	3	12
Non-Unitised Cargos	4	11	2	9	26
Complimentary Sectors	-	76	-	28	104
Secondary Demand					
Scenario 1 - Road	85	85	83	87	340
Scenario 2 - Rail	83	83	79	85	330
Total					
Scenario 1 - Road	173	257	167	211	808
Scenario 2 - Rail	169	251	157	206	783

Source: Liverpool City Region Local Enterprise Partnership, 2014

- 7.69 The report assumes an 80:20 split between logistics and manufacturing requirements for land. It further states that, given the region's strength in manufacturing and a resurgence in onshore manufacturing, the demand from manufacturing may be higher. A 60:40 logistics to manufacturing split could add a further 104 ha to this demand.
- 7.70 The study then looked at land supply in the sub-region, identifying available sites of greater than 5 ha in size, within 1-hour drive time from the Port of Liverpool. This includes land within Warrington,
- 7.71 Overall some 851.54 ha of land in 69 sites of greater than 5 ha each is identified within this area. Omega, at its 2013/2014 position and thus prior to the bulk of the recent development, was identified as one of the key sites within this total. Of the 69 relevant sites identified in the study, 12 are considered to be high quality immediately available sites covering 233 ha of land. This is considered sufficient to meet the 158 ha of land needed over the next five years (200 ha with 25 percent headroom).
- 7.72 Longer term, the report concludes that demand for logistics and manufacturing facilities (excluding specific port based requirements) is estimated at 580 ha (net), over the 20-year period. It suggests that whilst total supply of sites within the 1-hour drive time area is 851 ha, almost three quarters (618 ha) is constrained through availability or physical factors. Based on these findings a further 400 ha of high quality sites (500 ha to provide 25 percent headroom) is therefore required over the next 20 years in locations with reasonable accessibility to the Port. This includes the baseline growth that would have occurred in the region without expansion of Port's capacity. The report does not include recommendations as to the local authority areas in which to locate this additional employment land nor percentage breakdowns of the land by local authority.

Halton

- 7.73 Halton adopted its Core Strategy in April 2013. Halton Borough Council then hoped to proceed with a 'Delivery and Allocations' Local Plan Development Plan Document (DPD), to define individual site allocations and replace the remaining policies of the previous UDP. However, following the outcomes of recent Examinations in Public (EIPs), Halton now feels it cannot show an OAN for housing in the Core Strategy and intend to review that aspect of adopted policy along with the broader need figures on housing, employment and retail.

- 7.74 Housing need has been reviewed in 2016 through an updated Strategic Housing Market Area Assessment (SHMAA) which identified a need for 10,258 new homes in the Borough over 2014-2037, at a rate of 466 dwellings/year. Halton Borough Council feels it can meet the housing needs within the Borough, with housing development options likely to include a Green Belt release in the west Widnes/Hale area along with large residential developments in the Daresbury area.
- 7.75 In terms of employment land, the identified need is for 14.47 ha/year over the Core Strategy period 2010-2028. This generates a total land requirement of 312.55 ha including a 20 percent flexibility factor to maintain a range and choice of sites throughout the plan period. Reflecting the methodology used in the earlier Joint Employment Land and Premises Study (2010), which BE Group completed jointly for Halton, Knowsley, Sefton and West Lancashire Councils, the land need target was based on a roll forward of historic take-up rates from 1992-2008. However, Halton Council has recently identified errors in the monitoring which fed into the historic take-up figures. Revised data will be issued in summer 2016 and the resulting calculation of need is expected to be less than the 14.47 ha/year identified at present.
- 7.76 Against needs as they are currently set out in the Core Strategy however, Halton had an employment land supply, at April 2010, of 209.26 ha. To meet the currently outstanding need of 103.29 ha to 2028, Halton will look to secure opportunities for remodelling and regeneration of sites within existing employment areas. This includes 14 ha in the West Runcorn area. No additional large scale allocations of employment land are proposed.

Existing Employment Areas

- 7.77 The main existing strategic employment area in Halton is the Widnes rail freight facility, 3MG. The core area of this, which is owned and operated by Stobart Group, is largely fully developed. The main outstanding employment site, the 45 ha Ditton Strategic Rail Freight Site is now the subject of an application by Alstom for a large rail maintenance (painting) facility, anticipated to generated some 600 jobs across the sub-region.

Sci-Tech Daresbury

- 7.78 Based at the A56/A558 junction at Daresbury, Sci-Tech is a science and technology campus based around the existing technical facilities of the Science and Technology

Facilities Council (STFC). New development has been facilitated through a public-private joint-venture between, STFC and Halton Borough Council and developer Network Space. Since 2006, some 11,000 sqm of new build office and laboratory has been delivered here, including the Innovation Centre which is now home to 70 micro and small businesses. In 2011, Vanguard House was completed to provide further grow on and larger business accommodation.

- 7.79 The Innovation Technology Access Centre (I-TAC) opened in 2010 and is now providing laboratory facilities for about 6 companies on campus. Some of these companies also have office bases in the Innovation Centre. The campus will expand further in 2016 with the completion of the Techspace One and Two buildings, some 5,000 sqm of additional space. This will provide further grow-on space as well as providing options for more established technology companies in the range of 10-50 employees.
- 7.80 The next phase is expected to be the development of land in the south of the area for some 38,000 sqm of further floorspace, comparable to that already delivered. The final masterplan proposal is for 93,000 sqm of floorspace, supporting some 10,000 high quality jobs. Along with the STFC, key private sector occupiers include Lockheed Martin, IBM and the University of Liverpool's Virtual Engineering Centre.
- 7.81 1,100 are presently employed at Sci-Tech Daresbury, half (547) with the private occupiers and half with the STFC and academic occupiers. There is no definitive data on where those workers are drawn from. However, recent transport survey work suggests that up to 45 percent of the public/academic labour force, some 249 staff, come from Warrington Borough. The private sector companies are felt to recruit much more widely in the region and no more than 8-14 percent, up to 77 workers, are identified as commuting from Warrington in local business surveys.

Daresbury Park

- 7.82 Located at Junction 11, M56 Daresbury Park is a large park of mostly self contained office properties of up to 139-46,000 sqm each. The site extends to 91 ha and has outline planning consent for 148,650 sqm, bounding the De Vere Daresbury Park Hotel & Leisure Club. In recent years, Daresbury Park has seen modest new development in the north east, along the A56. This has been for small to mid-sized office units of 300-800 sqm in office parks such as Cinnabar Court. Daresbury Park draws its labour from a broad sub-regional area extending across Halton, Warrington,

north Cheshire and south Manchester.

- 7.83 At the time of the last census, 1,285 residents of Warrington were recorded as travelling to work in Daresbury. This is just over a quarter of all Warrington residents (4,674) who indicated that they travelled to work in Halton in 2011.

Other Employment Areas

- 7.84 Other employment areas in east Runcorn and Widnes are described as stable, with limited development land remaining. At Astmoor in Runcorn, business relocation associated with the development of the Second Mersey Crossing is now complete and no further displacement is assumed.

Liverpool

- 7.85 The Liverpool Employment Land Review (2009) estimated a demand for 200-317 ha of employment land, across the City, to 2026. As of 2009, Liverpool had a supply of 266 ha in 256 sites, close to the midpoint of the range of demand identified. The study noted that Liverpool's supply of B1 and B2 land is sufficient to meet needs, but there was a shortage of larger plots suitable for B8 warehousing and distribution uses.
- 7.86 This was updated in the Liverpool City Region Housing and Economic Development Evidence Base Overview Study, 2011. The study indicated a land supply, at December 2010, of 274.89 ha. Liverpool needs 254.58 ha of land to 2031, giving a modest oversupply of 20.31 ha. In the Liverpool City Region, only Liverpool and St Helens were judged to have more land than they will need for the next 20 years. A further Employment Land Review for the City has been completed recently but is not yet publicly available.
- 7.87 The recommendations of these two studies were subsequently reflected in the Liverpool Core Strategy (Submission Draft, 2012). 'Strategic Policy 2: Land for Employment' states that "*the City Council will allocate between 200 and 320 ha of land for industrial and business use over the plan period*", to 2028. As is indicated above, some 274 ha of employment land has already been identified leaving a maximum of 46 ha still to be found.
- 7.88 New employment development will be directed towards the City's five Strategic Investment Areas (SIAs):
- Approach A580 (The East Lancashire Road Corridor)

- Atlantic Gateway (North Liverpool)
- City Centre
- Eastern Approaches (the Edge Lane Corridor)
- Speke/Halewood (International Gateway).

- 7.89 The 2009 Employment Land Review indicated that the City Centre SIA is likely to accommodate a significant proportion of the identified B1(a) office demand (between 12 and 29 ha), particularly for medium to large floorplates accommodating sectors such as the banking. The City Centre office area is now effectively extending northwards with the gradual delivery of the Atlantic Gateway SIA (Liverpool Waters) which is now an Enterprise Zone. 60 ha of land is proposed for some 1.7 million sqm of mixed-use floorspace, including up to 314,500 sqm of offices. 2,500 people are already employed in the Princes Dock area for companies including KPMG, Royal Bank of Scotland and Coutts Bank.
- 7.90 For businesses seeking out of centre options, the Eastern Approaches SIA is likely to be a preferred location, particularly for ICT uses needing proximity to the City's universities. This will be a key regional centre for science and knowledge-based industries, particularly at Wavertree Technology Park and Liverpool Science Park. The latter accommodates some 11,000 sqm of high-specification office accommodation and commercial laboratory space, including incubation premises.
- 7.91 Collectively the City Centre/Liverpool Waters and Eastern Approaches SIA, form a regional office centre which will inevitably take some occupancy from centres like Birchwood and Warrington Town Centre.
- 7.92 Approach A580, along with Atlantic Gateway, is identified as a focus for B2 manufacturing growth over the Local Plan period. Forecast need is for 50 and 109 ha and, a reasonable supply of 93 ha was identified here in 2012, with another 32 ha in the Atlantic Gateway.
- 7.93 Projected demand for B8 premises in 2009, and not therefore inclusive of the most recent projections of port-related needs, was for between 121 and 196 ha. The Study felt that take up would be focused in the Approach A580 SIA, however, the area has very little land available, no more than 7 ha, specifically for B8 uses. Another 22 ha site is also potentially available at Stonebridge Court, under HCA ownership.

- 7.94 The only other SIA which is likely to accommodate such requirements is the Speke Halewood SIA. However, market consultation and supply analysis suggested that this was not a desirable location for this use, unless occupiers had specific air freight requirements which need proximity to Liverpool John Lennon Airport. Thus Liverpool was judged to have a shortfall in B8 and the report assumed that the bulk of the identified need will be met in the broader sub-region, extending out to Parkside in St Helens and Omega at Warrington.
- 7.95 As noted above, one surprising element of Liverpool's relationship with Warrington is that 563 more workers travel from Liverpool to Warrington to work than commute into the City. In discussions, this was generally felt to reflect the strong pull of key employment centres such as Birchwood (Omega had yet to commence when the 2011 Census was completed) on the suburban settlements of Eastern Liverpool, particularly those communities on the M62 and A580 Corridors.

St Helens

- 7.96 The St Helens Local Plan Core Strategy was adopted by St Helens Council on 31st October 2012. This set an initial target of 37 ha of employment land against a supply of 86.12 ha, much of which is suitable for both B2 and B8 development. Only 15.45 ha (17.5 percent) was suited to accommodate larger B2/B8 options, over 10,000 sqm in size though.
- 7.97 Future economic development (including Parkside) is focused within St Helens town core area and at Haydock Industrial Estate. The distribution of the 37 ha of identified employment land demand is likely to broadly follow the distribution of existing employment areas, with a focus on the M62 Link Corridor and Haydock employment areas. However, within St Helens the existing industrial areas are constrained from further development outwards due to being surrounded by development and Green Belt.
- 7.98 In 2015, BE Group completed an Employment Land Needs Study for St Helens, examining land requirements to 2037. This informed the emerging St Helens Allocations Local Plan 2017-2032 as well as the ATLANTIS programme, a transnational project that was seeking support under the EU's new Motorways of the Sea programme.

- 7.99 The OAN for employment land in St Helens to 2037 was examined and projected to guide planning in the borough. The assessment of the OAN utilised and critiqued three methodologies, including an examination of the historic take-up of employment land since 1997, the projected growth of the local employment market and the projected growth of the residential population. From an analysis of the three methodologies and with regard to the current market conditions, it was projected that St Helens would have a baseline requirement for employment land would be 147-174 ha between 2012 and 2037.
- 7.100 The SuperPort and Parkside projects are considered to have the potential to increase demand for employment land in the region, including St Helens, particularly for B8 and B2 uses. Accounting for the potential uplift in employment land demand due to these major projects, it was projected that St Helens would have an employment land requirement of 177-214 ha between 2012 and 2037 (Table 29).

Table 29 – Breakdown of Employment Land Need by Type

Employment Type	Hectares
B1(a) Office	10-15
B1(b) Research and development	1-4
B1(c) Light Industry	15-20
B2 General industrial	50-65
B8 Storage and Distribution	100-130
Total employment needs	177-214

Source: BE Group, 2016

- 7.101 Following completion of the Employment Land Needs Study a public consultation was held on the Local Plan between January and March 2016. Reflecting these comments, St Helens Council is now moving to deliver a Preferred Options Draft of the Plan, including proposed land allocations.

Omega Extension

- 7.102 The HCA are promoting land to the west of Omega South, that sits within St Helens Borough, through the recent St Helens Call for Sites for employment uses. The land was put forward for residential and employment totalling 31 ha. Further land to the north has been put forward by a private owner.
- 7.103 Although the extension of Omega is not formally endorsed by St Helens Council it remains one of a number that St Helens will consider beyond the current allocations

to meet its OAN. The Omega extension land would be for employment uses, and accessed via the existing development in Warrington, from Junction 8, M62.

- 7.104 Any development will need to satisfy highways requirements, and Highways England would be consulted. St Helens Council would look to determine what cross-boundary requirements such a scheme could satisfy.

Parkside Strategic Rail Freight Interchange

- 7.105 The 100 ha Parkside Strategic Rail Freight Interchange is a joint venture proposal from Network Space and St Helens Council on land mostly west of the M6, south east of Newton-Le-Willows. Along with the development of the SuperPort, the Parkside development provides a substantial opportunity for the North West region through increasing freight capacity and capability. Specifically, for St Helens, the proposal has the potential to be a substantial attractor to the area, with St Helens the focus of considerable freight throughput and for local businesses to more efficiently move stock.

- 4.50 The overall function of the strategic rail freight interchange is likely to have more of a direct relationship with the southern UK ports than with the Port of Liverpool, providing a means of transporting freight from the ports to the North West region, to be transferred to trucks at Parkside for distribution to the region. Its position on the M6 and rail corridors means it is ideally located to be a multi-modal freight interchange. The site would also be attractive to logistics operations that are limited to road transport; that is, the site would also be a key distribution site even without the strategic rail freight interchange. This would give it potential to compete with Omega, although it is likely that Omega (its current consented phases at least) will be nearing capacity by the time major delivery commences here.

- 4.51 A planning application for Parkside is expected by the end of the year, and the land will be promoted by the developer for logistics. St Helens Council have commissioned a study on the need/effect of Parkside, but this has not yet presented its findings

Haydock/Lea Green

- 4.52 Located north of the A580 East Lancashire Road, west of Junction 23, M6, Haydock Industrial Estate accommodates some 220 businesses. Expansion options totalling some 117 ha are being considered here, primarily on greenfield land.

- 4.53 Lea Green Colliery, is another key site with the potential to deliver some 19.5 ha of employment land although there are no immediate plans for delivery here.

Summary

- 7.106 Based on a mix of market evidence and commuting data, the FEMA for Warrington includes its immediate neighbours of Wigan, Trafford and Salford in Greater Manchester; Cheshire West and Chester, Cheshire East and particularly Halton and St Helens in the Liverpool City Region. Warrington also has good links with the nearby urban centres of Manchester and Liverpool. The other areas of Greater Manchester and the Liverpool City Region have more limited relationships with Warrington.
- 7.107 Cheshire West and Chester has a substantial employment land supply of some 315.7 ha. However, 57.7 percent of this is focused in Ellesmere Port with high portions only suited for specialist uses such as waste and energy. Links to Warrington will include the Thornton Science Park forms part of the Cheshire Science Corridor Enterprise Zone, along with sites at Birchwood Park and Alderley Park. Chester is a clearly defined sub-regional office location which will compete with Warrington for larger enquiries.
- 7.108 In Cheshire East, Midpoint 18 has some potential to compete with Omega for B2/B8 requirements. Expanding employment areas in Crewe represent a further focus for economic development in the Cheshire and Warrington area. Alderley Park, part of the Cheshire Science Corridor Enterprise Zone, has a focus on drug development and associated technology, a distinct offer from the nuclear/engineering focus of Birchwood.
- 7.109 In Salford, Port Salford is a key link along the Manchester Ship Canal, along with Port Warrington. The Port Salford National Import Centre comprises a 153,000 sqm warehouse facility with a container facility capable of handling 300,000 containers and 37 million freight pallets per year. Culina Group now occupies a warehouse on the site and further logistics development is now proposed.
- 7.110 In Wigan, the Pocket Nook Major Site, off the A580 East Lancashire Road and west of Atherleigh Way, is of most relevance to Warrington. The proposal is for a 29 ha high quality business park and 350 homes. If delivered as envisaged, this would have

the potential to compete with key sites in Warrington, particularly nearby Birchwood.

- 7.111 The latest research into the Port of Liverpool predicts increases in all areas of port trade. This will result in a need for 400 ha of land for logistics uses (500 ha to provide 25 percent headroom) in the sub region over the next 20 years. This need is spread across a large sub regional area which includes all of the Liverpool City Region, West Lancashire, Warrington and parts of Cheshire West and Chester. Locations close to the Port of Liverpool are always likely to be desirable but so are options in established logistics locations such as Omega.
- 7.112 In Halton, there is a clear link between Warrington and the Daresbury area. At the time of the last census, 1,285 residents of Warrington were recorded as travelling to work in Daresbury. This is just over a quarter of all Warrington residents (4674) who indicated that they travelled to work in Halton in 2011. The STFC at Sci-Tech Daresbury is particularly identified as drawing a high proportion of its labour from Warrington. The final masterplan at Sci-Tech is for some 93,000 sqm of floorspace, supporting some 10,000 high quality jobs which will inevitably generate strong benefits for Warrington. Elsewhere in Halton the 45 ha Ditton Strategic Rail Freight Site is now the subject of an application by Alstom for a large rail maintenance (painting) facility. No further large allocations of employment land are proposed by the Council, rather it will look to the remodelling of existing employment areas to meet needs.
- 7.113 In St Helens, development of a Strategic Rail Freight Facility at Parkside would compete with logistics operations in Warrington, although companies specifically needing a rail served site would not consider Omega anyway. It is also likely that the current phases of Omega will be nearing completion once Parkside commences major delivery of premises and rather it will compete with future logistics sites in Warrington Borough.
- 7.114 The HCA, and private land owners, are promoting land to the west of Omega, that sits within St Helens Borough, for employment uses. Although no decisions have been made regarding this option, if ultimately supported it would be accessed through the existing Omega site and represent a resource which would support the land needs of both Warrington and St Helens.
- 7.115 In terms of labour, Warrington is a net importer overall and draws in significant

numbers of workers from Wigan, St Helens and Halton. 10,460 people moved between Halton and Warrington to work in 2011, the largest commuter flow overall. Another 9,320 moved between St Helens and Warrington. Warrington is a large net exporter of labour to the City of Manchester and Trafford.

7.116 The main implications in the FEMA for Warrington can be summarised as follows:

- A growing number of strategic sites which may compete with Omega (and its successors) for B2/B8 requirements and with Birchwood for B1 options. However, locations such as Parkside and Pocket Nook (in St Helens) still have obstacles to overcome before delivery and may not start providing major property options until later in the Local Plan Period. The immediate impact on demand for land and property is expected to be limited, while in the long term increased competition is likely to be offset by growth in demand driven by the expanding Port of Liverpool
- The Manchester Ship Canal is a key asset in the FEMA and expansion at Port Warrington would help the Borough secure a share of its growth
- Warrington is losing professional and scientific labour to Sci-Tech Daresbury, although the strong overlaps between Halton and Warrington in this area mean that Warrington Borough is still deriving economic benefit from this flow. However, between Sci-Tech and The Heath Runcorn and the Cheshire Science Corridor Enterprise Zone Sites, the FEMA appears well catered for with science themed facilities
- Of more concern is the strong competition Warrington's office market faces from Manchester. Discussions with stakeholders suggest this is inhibiting demand for larger office premises at present. It is also behind comments made which suggest that the Borough could not support a second large office focused employment area, alongside Birchwood. For this reason, stakeholders do not support large scale B1(a) provision in Omega, alongside growth at Birchwood Park and in the Town Centre.

7.117 Sites in other local authority areas of the FEMA, even when of a strategic scale, will ultimately meet the OAN of those authorities rather than Warrington. The only exception would be, if realised, an expansion of Omega west into St Helens. Such as site, which would be accessed from Junction 8, M62 in Warrington Borough, would support both Warrington and St Helens. The two authorities would need to agree how the land supply resulting was divided between them.

8.0 OBJECTIVELY ASSESSED NEEDS

Introduction

8.1 Planning Practice Guidance states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods, and highlights that these should include historic land take-up and future employment/population change. The methodology employed in this study uses two models and associated sensitivity testing. None provide a definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and therefore they are considered in the context of the market overview undertaken as part of this study.

8.2 The models are:

- Historic land take-up forecast

This reviews the actual take-up of employment land in the Borough over a period of time. The method is not wholly reliable as there will be peaks and troughs and also different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up.

- Employment based forecast

This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs from figures are then translated to land using a formula based on a jobs to floorspace density, which in turn can be translated into the projected land need. This scenario uses as its base three econometric forecasts – Oxford Economics (2016), Cambridge Econometrics (2016) and the Cheshire and Warrington Econometric Model (2015) which uses some Cambridge Econometrics regional data and this therefore similar in findings to the Cambridge Econometrics data. These are ‘policy-off’ scenarios in that they do not account for any strategic policy initiatives which seek to boost jobs growth. To account for such policy initiatives, further sensitivity testing is undertaken. The sensitivity tests consider two potential outcomes – forecast growth as defined in the 2014 SEP and the LEP’s projections which form part of the devolution deal currently under negotiation (see Section 5.0).

These forecasts have several limitations. They are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends. Therefore, sensitivity testing against actual land take-up is undertaken to assess how the two trends in Warrington are related.

The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing, or shrinking which in turn can inform land and property needs.

- 8.3 In some forecast methodologies, a third, Resident Workforce forecast model is used. This uses the same method of forecasting as the employment based method but takes forecast changes in the working population i.e. labour supply, rather than jobs – labour demand.
- 8.4 However, in completing previous Employment Land Studies BE Group has found that labour supply figures do not accurately predict future land needs. Amongst other flaws there is no allowance for the impact of in-commuting or company aspirations for growth. The relevance of the figures is more related to evaluating the relationship between economic and housing needs. Therefore, the method is not utilised in this study.
- 8.5 The method adopted in this Study brings together all the forecasts, and compares them with historic trends through the sensitivity testing. To do this, actual land take-up and building completions over a period from 1996 to 2016 are compared with land needs that would have been generated from jobs change during the same period. The resultant land figures show that actual take-up is many times the assumed need compared with the jobs calculation for that period.
- 8.6 The methods, and calculations, are considered in turn.

Scope of the OAN

- 8.7 It should first be noted that all analysis in the section, whether of land take up or labour force change (policy on or policy off), relate to the local authority area of

Warrington Borough. Accordingly, the resulting Objectively Assessed Need is for Warrington Borough only. It does not relate to the wider FEMA, as discussed in Section 7.0. However, this does not preclude the option that strategic scale employment sites in areas close to the Warrington Borough boundary could contribute to meeting the identified OAN.

Model 1: Historic Land Take-up

8.8 Employment land take-up annually is recorded by the Council. Table 30 shows the schedule of completions between 1996 and 2016 based on this data. In total, over that period 292.97 ha of land has been developed and that equates to an average of 14.65 ha/year.

Table 30 – Employment Land Take-Up 1996-2016

Year	Total, ha	Comments
1996-1997	9.06	
1997-1998	12.41	
1998-1999	9.43	
1999-2000	21.80	Above average take up this year reflects the development of a Royal Mail Central Processing Depot on 7.81 ha at Omega South
2000-2001	11.63	
2001-2002	18.62	Above average take up this year reflects the development of the North West Regional Assembly building at Centre Park (1.23 ha) and 6.83 ha of completions around Birchwood.
2002-2003	6.49	
2003-2004	3.80	
2004-2005	14.19	
2005-2006	9.68	
2006-2007	17.58	Above average take up this year reflect the completion of 1.77 ha of B1 business premises at Gemini Business Park, 3.13 ha at Birchwood Park and 1.5 ha at Mandarin Court, Centre Park.
2007-2008	7.41	
2008-2009	12.36	
2009-2010	8.20	
2010-2011	5.58	
2011-2012	8.14	
2012-2013	7.12	
2013-2014	19.28 (4.45 less Omega)	14.83 ha at Omega – Brakes and Hermes

Year	Total, ha	Comments
2014-2015	63.91 (2.61 less Omega)	61.30 at Omega including Asda
2015-2016	26.28 (0.48 less Omega)	25.80 at Omega
Total	292.97 =14.65/year Less Omega 183.23 = 9.16/year	

Source: WBC/BE Group, 2016

- 8.9 Although there have been peaks and troughs in take up over the full 20-year period recorded, which generally accord with periods of national growth and recession, by far the most significant change has been the commencement of development at Omega since 2013/14. Overall, 101.93 ha has been completed at both Omega North and South over the last three years, 93.1 percent of overall take-up in those years. This increases to 109.74 ha if the development of the Royal Mail Depot on Omega South in 1999/00 is also included.
- 8.10 Clearly, the scale of this development, which accounts for just over a third of all completions since 1996 has a big impact on take up rates. Indeed, excluding Omega the annual take up rate reduces to 9.16 ha/year.
- 8.11 Omega is a strategic site with a market which is regional and national in scope, delivering B2 and B8 properties of an exceptional size in the local context. It has recently helped to satisfy a pent up regional demand for larger B2 and B8 options. Accordingly, the rest of this section looks at two forward projections of take-up – A strategic/local projection, inclusive of recent strategic Omega completions, i.e. based on 14.65 ha/year, and a local projection excluding Omega of 9.16 ha/year. A strategic only scenario is not considered as it would only be based on a short period (3-4 years) of intense recent take up at Omega that may not reflect real future demand across the next 21 years.
- 8.12 Using the strategic/local projection take-up rate, inclusive of Omega, and applying it to the period 2016-2037 (21 years), Warrington requires 307.65 ha of land to 2037, i.e.

$$14.65 \text{ ha/year} \times 21 \text{ (years)} = \mathbf{307.65 \text{ ha}}$$
- 8.13 Using the local take-up rate, exclusive of Omega, reduces the need to 192.36 ha, i.e.

$$9.16 \text{ ha/year} \times 21 \text{ (years)} = \mathbf{192.36 \text{ ha}}$$

- 8.14 The Borough should also have a buffer in supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2037 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2037. There is no set guidance on how long this buffer should be, however, in the 42 employment land studies completed by BE Group over the last decade, a buffer of five years has usually been applied. This has been identified as an acceptable margin in Local Plan Examination's in Public, in which BE Group's employment needs assessments have been appraised. Based on the historic take-up trend this would generate the following further land needs:

Strategic/Local Take Up Trend: 14.65 ha/year x 5 (years) = **73.25 ha**

Local Take Up Trend: 9.16 ha/year x 5 (years) = **45.80 ha**

- 8.15 Added to the 2037 need figure, this increases the requirement as follows:

Strategic/Local Take Up Trend: 307.65 ha + 73.25 ha = **380.90 ha**

Local Take Up Trend: 192.36 ha + 45.80 ha = **238.16 ha**

- 8.16 Overall need of additional land can then be assessed through a comparison of current supply set against these figures.

- 8.17 At 31st March 2016, there was a baseline of 231.87 ha of available land in the Borough. However, as noted in Section 6.0, a more realistic land supply scenario is 104.53 ha, of which 34.85 ha is largely local supply. This could require the Council finding a further 203.31 ha to meet local needs, increasing to 276.37 ha if a mixed local/strategic requirement is allowed for.

Strategic/Local Take Up Trend, plus a buffer: 380.90 ha – 104.53 ha (realistic supply, strategic and local combined) = **276.37 ha (further need)**

Local Take Up Trend, plus a buffer: 238.16 ha – 34.85 ha (realistic supply, local only)
= **203.31 ha (further need)**

Split by Use Class

- 8.18 Whilst overall need is important, further analysis can evaluate what the potential needs will be in the different use classes. Table 31 splits the 1996-2016 take up by the main employment use classes (B1 (a, b, c), B2, B8). If strategic level take up at Omega is included, over the 20 year period, 27.2 percent of take up was for B1(a)

offices (which will include elements of B1(b) uses, particularly at research facilities in Birchwood), 5.7 percent was for B1(c) light industry, 7.4 percent was for B2 general industry and 52.6 percent was for B8 storage or distribution. The remaining 7.1 percent was for a mix of uses. If Omega is excluded, then the extent of B1(a) office development over the last two decades become apparent. 43.4 percent of development was for offices, with local level B8 storage and distribution accounting for just under a quarter. B1(c)/B2 industry accounts for 20.9 percent.

Table 31 – Employment Land Take-Up 1996-2016, by Use Class

Completion Period	Use Class						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
1996-1997	0.71	-	0.71	-	4.77	2.87	9.06
1997-1998	3.42	-	-	-	6.24	2.75	12.41
1998-1999	2.52	-	0.7	0.73	2.55	2.93	9.43
1999-2000	4.43	-	3.12	-	10.7	3.55	21.8
2000-2001	5.76	-	2.86	-	0.1	2.91	11.63
2001-2002	6.49	-	1.92	-	7.85	2.36	18.62
2002 -2003	0.91	-	-	4.91	-	0.67	6.49
2003-2004	1.88	-	-	0.8	1.02	0.1	3.8
2004-2005	9.87	-	-	4.32	-	-	14.19
2005-2006	3.87	-	0.9	0.91	4		9.68
2006-2007	10.99	-	1.99	0.7	1.1	2.8	17.58
2007-2008	3.92	-	0.98	2.51	0	-	7.41
2008-2009	4.27	-	2.38	2.75	2.96		12.36
2009-2010	7.94	-	-	0.26	-	-	8.2
2010-2011	0.34	-	0.38	0.53	4.33		5.58
2011-2012	2.74	-	-	0.82	4.58		8.14
2012-2013	4.4	-		0.64	2.08	-	7.12
2013-2014	2.03	-	0.67	1.75	14.83	-	19.28
2014-2015	2.61	-	-	-	61.3	-	63.91
2015-2016	0.48	-	-	-	25.8	-	26.28
Total (percent) Inclusive of Omega	79.58 (27.2)	-	16.61 (5.7)	21.63 (7.4)	154.21 (52.6)	20.94 (7.1)	292.97 (100.0)
Total (percent) Excluding Omega	79.58 (43.4)	-	16.61 (9.1)	21.63 (11.8)	44.47 (24.3)	20.94 (11.4)	183.23 (100.0)

Source: WBC/BE Group, 2016

8.19 Therefore, projecting the historic split of land need forward for the period to 2037, and

differentiating between strategic and local growth options, Table 32 shows the anticipated need for the different use classes for the Strategic/Local Take-Up Model. This is then compared to the current realistic employment land supply, as of 31st March 2016, as defined in Section 6.0 and split, in that section, by B1/B2/B8 uses. The Further Need, by use class, for this model can then be identified.

Table 32 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
<i>Percentage Inclusive of Omega</i>	27.2	-	5.7	7.4	52.6	7.1	100.0
Strategic/Local Take Up Trend	103.60	-	21.71	28.19	200.35	27.05	380.90
2016 Realistic Supply, by Use Class*	30.46	-	35.17**		35.72**	3.18	104.53
Further Needs	73.14	-	14.73		164.63	23.87	276.37

Source: WBC/BE Group, 2016

*Strategic and Local Supply. **For the purposes of this exercise, the remaining strategic B2/B8 supply at Omega is split evenly between those two uses.

- 8.20 As Table 32 shows, comparison between the Strategic/Local Take-Up Model and strategic/local land supply, shows a substantial shortfall in B8 land, equating to some 164.63 ha. Comparison with the equivalent need in the Local only model (Table 33, below), suggest that some 117.14 ha (71 percent) of this would be of a strategic nature. Even allowing for a reasonable provision of B1 uses on Omega Phases One and Two, there is still a sizable unmet need for B1(a) offices of 73.14 ha. Demand for B1(c)/B2 industrial uses is more modest by comparison.
- 8.21 Table 33 undertakes the same exercise for the Local Take-Up Model, comparing that need against the identified local only realistic supply (34.85 ha). As the need for offices does not change, but possible B1 land at Omega is taken out of consideration, the unmet B1(a) need raises to 91.90 ha. B8 need is 47.49 ha, an indication of what proportion of that need is locally based. The industrial requirement is some 40 ha, with another 24 ha of mixed, but likely primarily industrial, need.

Table 33 – Full Need, Split by Use Class – Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
<i>Percentage - Excluding Omega</i>	43.4	-	9.1	11.8	24.3	11.4	100.0
Local Take Up Trend	103.36	-	21.67	28.10	57.87	27.16	238.16
2016 Realistic Supply, by Use Class*	11.46	-	9.83		10.38	3.18	34.85
Outstanding Needs	91.90	-	39.94		47.49	23.98	203.31

Source: WBC/BE Group, 2016

*Local Supply only.

Model 2A: Employment Based Forecast – Baseline Forecast

8.22 This scenario uses as its base three econometric forecasts - Oxford Economics, Cambridge Econometrics and with higher level input from the Cheshire and Warrington Econometric Model (2015) which uses some Cambridge Econometrics regional data and is therefore similar in findings to the Cambridge Econometrics data. The forecasts project employment change from 2016 to 2037 (or 2025 in the case of the Cheshire and Warrington model). In addition, the models available includes actual data from 1981 onwards and thus past demand can be used to calculate the assumed land need over the historic period for comparison with actual land take-up over the same period.

8.23 The first section deals with calculation of future needs.

Employment

8.24 The different forecasts provide employment broken down on a different sectoral basis. The Oxford Economics forecasts break down employment to the level of 85 industrial sectors and Cambridge 12 sectors. These provide employment change during the projected time periods, and allow those jobs relevant to employment land to be identified. It should be noted that for this model the forecasts reflect a ‘policy off’ position. In other words, this is a non-intervention scenario in which none of the LEP or Local Authority specific initiatives are considered. Later we consider some reasonable sensitivity analysis to examine potential ‘policy on’ scenarios.

8.25 There are several points that need to be considered when interpreting and using

economic forecasts and the results drawn from them:

- The results are indicative rather than exact. While econometric modelling is carried out using the best available economic data the results are an indication of what is likely to happen and they may of course vary dependent on unexpected events. The recent referendum result on EU membership is an example of this.
- The longer term the data, the more variation is likely.
- There can be significant differences in the outcomes predicted by different companies. Typically, forecasters start with their assumptions on the national growth position and break it down to a local level using a range of assumptions. Clearly the headline growth expectations and the assumptions will differ.

8.26 The overall job growth projections are set out in the table below:

Table 34 – Jobs Growth Projections

Forecast	2013	2016	2025	2037
Oxford Economics (May 2016)	131,400	136,100	146,700	155,800
Cambridge Econometrics (Nov 2015)	131,700	144,500	151,800	162,800
Cheshire and Warrington Econometric Model*	N/a	144,300	151,600	N/a

*Uses Cambridge Econometrics regional data

Source: Oxford Economics, Cambridge Econometrics, 2015 and 2016

8.27 It can be seen from the table above that the different forecasting companies start from different perspectives on current employment. The point at which there is agreement on employment levels in Warrington was 2010 but the estimates in 2013 are reasonably close.

8.28 Growth projections for the 2016-2037 forecast period are summarised in Table 35. The Cheshire and Warrington model has been excluded because it uses Cambridge Econometrics data and does not record historic data nor data beyond 2025.

Table 35 – Jobs Growth Projections, Forecast Period

	2016-2037
Oxford Economics	19,700
Cambridge Econometrics	18,300

Source: Oxford Economics, Cambridge Econometrics, 2015 and 2016

8.29 To try and understand the differences in the projected growth, the sectoral split is analysed. The split is based on Standard Industrial Classification coding, and each use a slightly different breakdown, but for comparison purposes the following table shows the two forecasts with some of the sectors combined.

Table 36 – Employment Change by Employee Numbers 2016-2037

Sector	Oxford Economics	Cambridge Econometrics
Agriculture, etc.	(100)	(100)
Mining and quarrying	0	0
Manufacturing	(1,900)	(2,900)
Electricity, gas and water	(500)	300
Construction	3,300	700
Distribution	2,000	1,700
Transport and storage	600	800
Accommodation and food services	1,200	3,500
Information and communications	1,200	700
Financial and business services	11,100	10,400
Government services	800	2,600
Other services	,2000	800

Source: Oxford Economics, Cambridge Econometrics, 2015 and 2016

*Figures in brackets are negative, i.e. jobs/property/land losses.

8.30 The strongest growth predicted by both forecasts is in the financial and business services sector with between 10,400 and 11,100 jobs forecast to be created before 2037. Both forecasts also predict an increase (albeit more modest) in employment in Information and Communication, Government Services and Other Services. When these results are aggregated Oxford Economics predict a further 15,100 jobs and Cambridge Econometrics 14,500 jobs in sectors likely to require B1(a) office accommodation. This represents a 19.2 percent increase on current sectoral employment levels in these sectors (78,500 in 2016) per Oxford Economics, 17.6 percent per Cambridge Econometrics (82,300 in 2016).

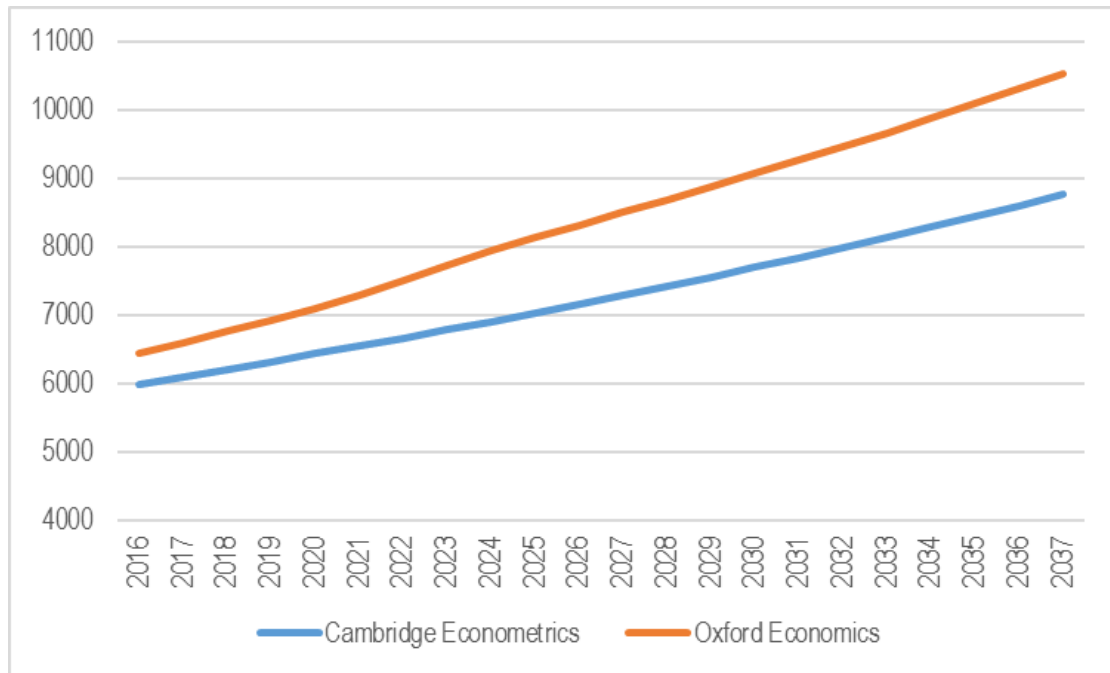
8.31 While both forecasts predict growth in construction services, there is clearly a big variation in the levels of growth predicted, with Oxford Economics predicting over 4.5 times the jobs growth of Cambridge. Accommodation and food services is also predicted to grow, this time with Cambridge the more positive towards the sector.

- 8.32 Both forecasts predict reasonable growth in transport and storage, distribution of 2,500-2,600 jobs which highlights the likely ongoing strength of logistics in the Warrington economy. This is without accounting for 'policy on' initiatives such as Liverpool 'Superport' and Atlantic Gateway which provide further B8 growth potential.
- 8.33 Manufacturing is predicted to continue its decline in Warrington. Oxford Economics predict a further reduction of 1,900 in the sector with Cambridge more pessimistic and predicting a 2,900 job reduction.
- 8.34 Both forecasts suggest growth in public sector employment, with Cambridge Econometrics predicting by far the largest growth of 2,600 Oxford Economics provides a further breakdown of public sector jobs, and predicts a decline in public administration and education, but growth in health. The growth in health and possibly growth in education may well account for Cambridge Econometrics' high figures, where the statistics are drawn down from regional figures and apportioned. Thus, growth that may occur in the cities, such as Liverpool and Manchester which have large education and health bases, are also reflected in neighbouring centres, and which consequently presents an overly optimistic picture.

GVA

- 8.35 Growth across the sectors is not measured by jobs growth alone. Changes in Gross Value Added (GVA) measures the contribution to the economy of each sector and can show how jobs growth compares with economic growth.
- 8.36 Both forecasting firms set out predictions for GVA growth and they are illustrated in Figure 8.
- 8.37 It is interesting to note that there is some difference in the belief of Warrington GVA generated in 2016 with Oxford Economics more upbeat about the current performance of Warrington and then when they extrapolate forecast growth they predict a faster growth than Cambridge Economics.
- 8.38 In terms of overall predicted growth rates, both forecasts show relatively steady growth and the percentage positions are set out in Table 37.
- 8.39 The GVA growth and jobs change are reasonably consistent over time and between the two forecasts but with Oxford Economics suggesting the strongest performance in the Warrington economy.

Figure 8 – Forecast GVA Growth to 2037 (£000s)



Source: Oxford Economics, Cambridge Econometrics, 2015 and 2016

Table 37 – GVA Growth Forecasts 2016-2037

	GVA (Percent increase 2016-2037)	GVA Annual increase
Cambridge Econometrics	46.4	2.21
Oxford Economics	63.6	3.03

Source: Oxford Economics, Cambridge Econometrics, 2015 and 2016

8.40 It is worth noting that, both forecasts have an optimistic view of further GVA gain, as average growth for the UK over the last decade, was 1.25 percent. Clearly if Warrington only achieved this level of growth to 2037 then the jobs increase, and hence the land need, would be smaller than is forecast here. However, it is the function of this study to allow the Council to plan for positive rather than negative growth scenarios and, as is discussed below, even the strong Oxford and Cambridge forecasts of growth underestimate land needs when compared to historic take up levels.

Assessing Objectively Assessed Needs

8.41 Thus, the Gross Value Added trends and jobs change appear reasonably consistent. In terms of future employment land requirements, only certain sectors will translate jobs into a requirement for employment land. The model assesses what percentage of

jobs in each sector translates to floorspace. For example, in transport and storage a percentage of jobs will be warehouse based, whilst the remainder will be drivers not operating on site. Thus this model is likely to be affected by a number of key factors:

- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the period to 2037, and we have therefore assumed that this mix will not change over the period.
- The percentage of employees in each sector that will translate to floorspace
The proportion of people in each industry sector that occupy B1, B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'.
- The average space each employee occupies – the employment density. We have assumed no variation in the density rates through to 2037, and have used those densities identified in the HCA 2015 published Employment Densities Guide 3rd Edition. With changing work practices, the densities will vary, but in the absence of more locally sourced data this industry accepted data is used.
- The average development floorspace per ha for office, manufacturing and warehousing activities. We have applied the uniform amount of 3900 sqm per ha.

8.42 These assumptions are summarised in Table 38.

Table 38 – Model Assumptions

Industry Sector	Employees		
	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
Agriculture	5	12	Managerial, admin, thus B1(a) office space
Manufacturing	100	47	The density reflects largely B1(c) light industrial space. The model ratios do allow for higher levels for B2 uses.
Utilities	26	12	Managerial, admin, thus B1(a) office space
Construction	26	12	Managerial, admin, thus B1(a) office space

Industry Sector	Employees		
	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
Distribution	48	70	Warehouses, offices - primarily 'Final Mile' Distribution Centres
Transport	48	70	Warehouses, offices - primarily 'Final Mile' Distribution Centres
Financial & Business	100	12	B1(a) offices
Government & Other Services	22	12	Local Government, Public Administration B1(a) offices

Source: SERPLAN and HCA, 2015

8.43 Using the adjustments shown in Table 44, the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector. The detailed calculations for this can be found in Appendix 6.

8.44 Once a total floorspace is calculated, the figures are then translated to a land requirement using the ratio of 3,900 sqm per hectare. This applies to all use classes. Table 39 show these calculations. Sectors showing jobs growth resulting a positive land requirement are shown separately from jobs reductions

Table 39 – Employment Based Forecast 2016-2037*

Growth Sectors	Oxford Economics	Cambridge Econometrics
Total Floorspace, sqm	252,648	229,296
Divided by Development Floorspace per ha	3,900	3,900
Equivalent Employment Land Needed, ha	64.78	58.79
Sectors in Decline	Oxford Economics	Cambridge Econometrics
Total Floorspace, sqm	(90,920)	(136,360)
Divided by Development Floorspace per ha	3,900	3,900
Equivalent Employment Land Reduction, ha	(23.31)	(34.96)
Net Land Need, ha	41.47	23.83

Source: BE Group, 2016

*Figures in brackets are negative, i.e. jobs/property/land losses.

8.45 When the land needs from both jobs growth and jobs reduction are brought together the net land requirement based on these changes can be calculated as a land need of 23.83-41.47 ha.

8.46 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in both models. Even if this decrease does occur as forecast, there is no reason to assume that a decline in employment will lead to a significant loss of employment land. Experience suggests that even where businesses are contracting, in labour terms, they will continue to hold onto sites in anticipation of future improvement and change. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.

8.47 Thus there is a case for looking at the land need resulting from sectors predicted to grow only. This gives a need ranging from **58.79 ha** to **64.78 ha**.

8.48 However, even on a growth only scenario, the figures fall significantly below the forecast based on historic take-up.

Model 2B: Employment Based Forecast – Sensitivity Testing Against Policy-On/Revised Growth Scenarios

8.49 Model 2A examined the ‘policy off’ position, i.e. the outcome which, given national trends in the economy might be expected to occur anyway in Warrington without any intervention. This section provides a sensitivity test of the baseline forecasts against existing and emerging strategic policy initiatives. Specifically, these are Cheshire and Warrington LEP growth targets, as defined in the 2014 SEP and further LEP growth projections which form part of the Cheshire and Warrington devolution deal currently under negotiation.

Sensitivity Test One – Strategic Economic Plan

8.50 The 2014 SEP sets out the target that by 2030 Cheshire and Warrington would become a £35 billion economy adding 100,000 residents and creating 75,000 new jobs and 70,000 new homes.

8.51 The SEP outlines a mixture of geographic and functional programmes to support this growth prospect. However, even the geographic programmes do not restrict

employment growth projections to a single local authority area.

- 8.52 To permit some level of apportionment, this study splits the projected growth according to the current distribution of employment, output and residents for Cheshire West and Chester, Cheshire East and Warrington. Table 40 shows what proportion of the three factors should be applied to Warrington.

Table 40 – Apportionment of economic outputs across the LEP

	Proportion in Warrington, Percent
GVA	25.3
Population	22.6
Employment	26.6

Source: Mickledore, 2016

- 8.53 If the 2013 forecasts, which informed the SEP, are apportioned on this this basis, the employment growth predicted in the SEP would suggest that Warrington would increase its employment by 19,950 jobs to 2030.
- 8.54 In practice, this ‘policy on’ position is no more ambitious than the forecast position predicted by Oxford Economics and much less ambitious than the employment growth forecast, with no policy levers, by Cambridge. Cambridge forecast’s employment growth of more 4,770 people than the SEP over the same period.

Table 41 – Comparison of SEP with Baseline Economic Forecasts

	2013	2030
SEP, jobs	-	+75,000
Warrington, percent		26.6
Warrington employment, jobs		+19,950
Cambridge forecast, jobs	131,380	+24,720
SEP difference from Cambridge, jobs		-4,770
Oxford forecast, jobs	131,700	+19,000
SEP difference from Oxford, jobs		+950

Source: Oxford Economics, Cambridge Econometrics, Cheshire and Warrington LEP, 2013- 2016

- 8.55 Applying a ‘policy on’ scenario incorporating the SEP target would not deliver a jobs to land target significantly different from those already set out in Model 2A. On this basis the SEP reinforces the requirements shown above rather than offering a sensitivity variation.

Sensitivity Test Two – Devolution Bid

- 8.56 The SEP was developed in 2013 as part of the preparation for the European Structural Investment Fund Strategy. In 2015, the local and sub-regional agencies of the UK started preparing for a slightly different policy agenda which was based on plans to devolve more power and funding to the regions. Against this policy agenda Cheshire and Warrington LEP prepared a framework of policy requirements and targets to 2040 which would support greater devolution of powers to the sub-region.
- 8.57 As noted in Section 5.0, the Devolution Bid sets out a vision of a ‘Warrington New City’ which involves (within the numbers shown above) 26,000 new homes and 55,000 new jobs over 2015-2040. The Warrington New City targets suggest that their achievement will be ‘across the economic hinterland’ and therefore the growth will extend beyond the Warrington Local Authority Area.
- 8.58 On the basis that the Warrington New City targets are not solely directly attributable to the local authority area, this study instead apportions the jobs growth from the devolution bid in proportion to the scale of current employment in the LEP area. If Warrington secures 26.6 percent of the employment growth predicted in the Devolution Bid the increase in employment in Warrington will be 33,782 by 2040.
- 8.59 This study only forecasts jobs growth to the end of the Warrington Local Plan period of 2037. In order to compare these forecasts with the Devolution Bid this study assumes that the job growth in the bid is linear and therefore that only 88 percent of the job growth would be achieved by 2037. This would suggest that Warrington will achieve 29,728 jobs by 2037. The devolution bid is compared to the economic forecasts in Table 42.

Table 42 – Comparison of Devolution Bid with economic forecasts

	2016	2037
Devolution bid, jobs	-	+111,760*
Warrington, percent		26.6
Warrington employment share, jobs		+29,728
Cambridge forecast, jobs	144,500	+18,300
SEP difference from Cambridge, jobs		+11,428
Oxford forecast, jobs	136,390	+19,700
SEP difference from Oxford, jobs		+10,028

Source: Oxford Economics, Cambridge Econometrics, Cheshire and Warrington LEP, 2013- 2016
* Proportionately reduced back from 127,000 by 2040.

8.60 It can be seen from Table 42 that the ‘policy on’ devolution bid sets employment growth targets which is significantly more ambitious than the growth predicted by the Oxford and Cambridge baseline economic forecasts.

8.61 The devolution bid, at present, has not been developed into a detailed strategy. However, based on the policy emphasis in the current SEP it is assumed there will be a focus on knowledge based industries and logistics associated with the Atlantic Gateway. As such the employment growth is likely to be disproportionately shared between transport and logistics, business services and technical activities.

8.62 Using the Cambridge Econometrics Forecast as a base, Table 43 shows the expected proportional split of employment in Warrington, by sector, in 2037. Within this, it is possible to make an estimate (indicative only as some jobs will be accommodated in non B-Class premises) that a third of employment growth would be based in sectors requiring industrial/warehousing and the remaining two thirds would be in office type facilities.

Table 43 – Proportions of Warrington Employment – Cambridge Econometric Forecasts 2037

Sector	Percent
Agriculture, etc.	0.29
Mining and quarrying	0.00
Manufacturing	2.84
Electricity, gas and water	2.02
Construction	6.23
Distribution	14.70
Transport and storage	7.23
Accommodation and food services	7.26
Information and communications	3.56
Financial and business services	32.92
Government services	18.06
Other services	4.90

Source: Cambridge Econometrics, 2016

8.63 Applying this split to the additional jobs suggests that of the extra, up to 11,428 on the Cambridge Baseline Forecast, 7,542 jobs will be in office/technical based environments and a further 3,886 jobs in warehouse/industrial environments. This is

consistent with the sectors identified in the SEP.

8.64 This additional 'policy on' employment will create an additional development land requirement as follows in Tables 44 and 45.

Table 44 – Additional Floorspace from 'Policy On' Position

Sector	Additional employment	Percentage of employment in premises, percent	Floor space required per person, sqm	Total Floor space required, sqm
Distribution, Transport and Storage	3886	48	70	130,550
Business services, etc.	7542	100	12	90,504
Total				221,054

Source: BE Group and Mickledore, 2016

Table 45 – Additional Land Need from 'Policy on' Position

Sector	Total Floor space required, sqm	Development space, sqm per ha	Total land required, ha
Distribution, Transport and Storage	130,550	3900	33.47
Business services, etc	90,504	3900	23.21
Total	221,054	3900	56.68

Source: BE Group and Mickledore, 2016

8.65 The conclusion is therefore that using the Devolution Bid as the basis for the employment land requirement would result in an additional land requirement over the current forecasts of some 56.68 ha.

Employment Land Take-Up/Employment Change Comparison

8.66 In reality the employment change does not translate to land provision in the way set out in the above employment-based models. There are several factors that will influence the land requirement and it is necessary to understand the market signals to predict a more accurate employment land requirement. These factors include:

- To what extent the growth in office employment takes place in town centre locations, at higher densities, rather than in low-density business parks. Warrington, with its twin office centres of Birchwood and the Town Centre will

likely see development at a mix of densities. Where growth is predicted in town or city centres different densities would be applied, closer to 100 percent site coverage

- Will the decline in jobs lead to the release of land? As noted previously, experience suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvement and change. Where jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.
- Land take-up/property needs can be for different reasons such as modernisation or geographic relocation, land banking for future needs
- Expansion may also be within existing premises or on expansion land not accounted for in land allocations.

8.67 Therefore, to test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for two historic periods. For this analysis, just Cambridge Econometrics baseline (policy-off) forecasts are used, as subject to minor variances, the historic jobs figures of the two forecasts are similar

- The long-term period from 1996-2016 and compared to the actual land take-up during that period (Table 46)
- 2000-2007 which was a period of sustained economic growth nationally (Table 47).

Table 46 – Employment Land Take-Up/Employment Change Comparison 1996-2016 (Cambridge Econometrics) *

Employment Change	Total Jobs	Land (Ha)
Growth	516,672	132.48
Decline	(467,340)	(119.83)
Net growth	49,332	12.65
Historic land take-up	-	292.97 (183.23 less omega)

Source: Cambridge Econometrics, WBC, BE Group, 2016

*Figures in brackets are negative, i.e. jobs/property/land losses.

**Table 47 – Employment Land Take-Up/Employment Change Comparison
2000-2007 (Cambridge Econometrics) ***

Employment Change	Total Jobs	Land (Ha)
Growth	99,804	25.59
Decline	(98,844)	(25.34)
Net growth	960	0.25
Historic land take-up	-	81.99

Source: Cambridge Econometrics, Sefton Council, BE Group, 2015

**Figures in brackets are negative, i.e. jobs/property/land losses.*

8.68 The two tables show that low net jobs growth during both periods, would have resulted in extremely modest land needs which represent only a fraction of what was taken up.

8.69 Thus, the trend shows that net jobs growth is not an accurate method of calculating land. **Even when land is calculated on the sectors that generate a positive jobs figure over the two periods, there is still a shortfall between the anticipated take-up from a jobs calculation and the actual market take up, particularly if strategic development at Omega is included. This calculation reinforces the view that historic take-up is the most appropriate method.**

Summary

8.70 The five alternative forecast options have been produced and considered for the period of 2016-2037, for Warrington Borough. The calculations for each are summarised in Table 54 and show varied outcomes.

8.71 The scenarios outlined in Table 48 are based on the adjusted land availability where sites considered undeliverable (or deliverable only for specific companies), or already developed, are excluded. A distinction is made between the realistic local supply of employment land, 34.85 ha, and the strategic supply at Omega, a further 69.68 ha. The total land supply for the Borough, as noted in Section 6.0 is 104.53 ha.

8.72 To allow for this distinction in strategic and local supply, two take-up scenarios are put forward. The first projects forward all take-up, both strategic and local, over the last 20 years, onwards to 2037. A scenario for strategic take up only is not considered because to date, only 3-4 years of very high take up have been recorded at Omega which may not prove typical of need for the next 21 years.

8.73 The figures also allow for a five-year buffer to allow for choice and potential change in needs during the Plan Period as well as accounting for further possible losses in the supply.

8.74 If employment based forecasts are taken then there is a further need of 16.49-45.35 ha, to 2037 under the Oxford Forecast and 5.35-37.94ha under the Cambridge Forecast. As the forecasts primarily measure local prospects for job growth they are compared to the local land supply only. The enhanced jobs targets of the Devolution Bid would boost that need by an additional 56.68 ha on top of each total.

Table 48 – Warrington Borough Land Forecast Models – Summary

Model	Land Stock 2016, ha – Strategic and/or Local Supply*	Land Need 2016-2037, ha	Buffer (five years further need) ha	Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for Devolution Bid**	Assumptions
Strategic/ Local Take Up	104.53 Strategic/ local supply	307.65	73.25	(276.37)	-	Based on historic (20 years) take-up of 14.65 ha/pa. Inclusive of take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture Devolution Bid figure not applicable to take-up scenarios Of the shortfall in this scenario: <ul style="list-style-type: none"> • 117.14 ha is primarily strategic (B8 uses) • 159.23 ha is primarily local in nature.
Local Take Up	34.85 Local supply	192.36	45.80	(203.31)	-	Based on historic (20 years) take-up of 9.16 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture Devolution Bid figure not applicable to take-up scenarios
Employment based on adjusted stock – Oxford Economics Model	34.85 Local supply	+64.78 Growth +41.47 Change	+15.42 +9.87	1) (45.35) 2) (16.49)	1) (102.03) 2) (73.17)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Model	Land Stock 2016, ha – Strategic and/or Local Supply*	Land Need 2016-2037, ha	Buffer (five years further need) ha	Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for Devolution Bid**	Assumptions
Employment based on adjusted stock – Cambridge Econometrics Model	34.85 Local supply	+58.79 Growth +23.83 Change	+14.00 +5.67	1) (37.94) 2) 5.35	1) (94.62) 2) (51.33)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore 2016

*Realistic land supply at 31st March 2016

**Further 56.68 ha of land need.

8.75 However, from the market assessment and reviewing the historic trends in employment change and land take up, this approach suggests that employment land needs are underestimated. When a comparison of past employment change over the period 1996-2016 and 2000-2007 periods is made, actual land take-up is almost 15 times more than the estimate put forward by the growth only approach.

8.76 In conclusion, it is considered that the most appropriate forecasts are the two Take-Up Scenarios which look at local only and local/strategic needs. Within these two, the Local/Strategic Take-Up Model best reflects the full range of need Warrington is likely to have to 2037.

8.77 Warrington's previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 49 applies the same proportionate split to the Borough's projected supply shortfall, to 2037, under the Local/Strategic Take-Up Model. A strong need for further B8 land is noted, of which 71 percent (117.14 ha) is identified as being primarily strategic in nature. Some 73 ha of B1(a) office land would also be required under this model, a requirement which would increase to 92 ha if the identified 19 ha of B1 land at Omega Phases One and Two is not ultimately brought forward.

Table 49 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
<i>Percentage Inclusive of Omega</i>	27.2	-	5.7	7.4	52.6	7.1	100.0
Strategic/Local Take Up Trend	103.60	-	21.71	28.19	200.35	27.05	380.90
2016 Realistic Supply, by Use Class*	30.46	-	35.17**		35.72**	3.18	104.53
Further Needs	73.14	-	14.73		164.63	23.87	276.37

Source: WBC/BE Group, 2016

*Strategic and Local Supply. **For the purposes of this exercise, the remaining strategic B2/B8 supply at Omega is split evenly between those two uses.

9.0 LAND NEEDS OF NON-B CLASS USES

Introduction

9.1 Reflecting a wider definition of economic development this section considers, as far as is possible, future requirements for land from non-B class sectors that are also employment generators. The geographic focus of this analysis is Warrington Town Centre, the main retail and leisure centre, although District Centres such as Birchwood and Stockton Heath are also discussed, where relevant.

9.2 For this study the following broad sectors have been identified:

- Retail
- Accommodation and food service activities (tourism related)
- Education
- Human health and social work activities
- Arts, entertainment and recreation.

9.3 It must be recognised that the job and space requirements associated with these sectors are estimated and planned for in a different way to B class uses. For example, health facilities will have quite specific land needs that are not linked directly to job numbers; education facilities are planned based on forecasts for pupil roll numbers and capacity in existing schools/colleges. Retail or leisure operators will often locate in town centres, within mixed-use schemes or in locations of their choice, rather than on specifically allocated sites.

Retail and Warrington Town Centre

9.4 Warrington Town Centre is the largest retail centre in the Borough. This is followed by three District Centres – Birchwood, Stockton Heath and Westbrook – eight Neighbourhood Centres and 33 Local Centres.

Retail Demand

Warrington Retail and Leisure Study (2015)

9.5 In 2015 Warrington BC commissioned a Retail and Leisure Strategy. This document considered the comparative and convenience retail offer and the leisure offer across Warrington as a whole.

- 9.6 The overall finding of the study was that whilst the current retail offer is sufficient for a town of the size of Warrington, there is likely to be a requirement for further retail space by 2030. The needs are for a further 1,000-1,900 sqm of convenience goods space and 24,700-41,100 sqm of comparison goods space. The current leisure offer is likely to be sufficient to meet demand.
- 9.7 In terms of further development, the focus is likely to be on Warrington Town Centre, with a need for further convenience shopping in the new residential developments at Omega Phase Three (now separated from the broader land supply at Omega, see Section 6.0) and at Omega Phases One and Two (discussed below). Also associated with the Warrington Waterfront proposals (see Section 7.0) and in Rushgreen Road, Lymm.
- 9.8 In terms of comparison shopping, the report highlights the ability of current vacant floorspace to going some way to meeting the future space requirements and notes that the town centre offers somewhat patchy performance. The Golden Square Shopping Centre is performing well but that the remainder of the town centre has substantially higher vacant space than the national average. The vacancy rate (after accounting for the managed vacancies required for the Bridge Street redevelopment) was 15 percent compared to 9 percent for the average UK High Street.
- 9.9 Warrington Town Centre has a mainly local catchment area due to the competing retail offer in Liverpool and Manchester, including from the Trafford Centre. The Town Centre has also competing offers from within the Borough with increased retail provision at Gemini Retail Park. As a result, Warrington Town Centre's retail ranking slipped from 69th to 76th between 2013 and 2014.
- 9.10 The report specifically links the decline in the market share of the Town Centre to the increase in the market share captured by the Gemini Retail Park, which may have implications for the Bridge Street redevelopment. The recommendation of the report is that Warrington seeks to re-use, redevelop or refurbish the under-used retail units in the Bridge Street area.
- 9.11 Outside of the Town Centre, the report notes vitality of the Birchwood Shopping Centre although considers that the financial and leisure sector are under-represented in Birchwood and that the centre provides no contribution to the night time economy.

- 9.12 Stockton Heath is performing strongly but traffic congestion and a lack of parking are the key issues for the area. The Morrisons foodstore in Stockton Heath captures the highest percentage of expenditure of any convenience store in Warrington.
- 9.13 The third district centre is Westbrook and it is noted that this centre, whilst performing well, is dominated by the Asda supermarket and the retail offer provided by the other smaller units is limited.

Retail and Leisure Premises Demand

- 9.14 Table 50 provides a summary of the comments received by agents on the local retail and leisure property market.

Table 50 – Property Market Comments – Retail and Leisure

Contact	Comment
National Agent	Deals mainly with retail in Warrington Town Centre, where the market has become significantly diminished over the last 10 years. Golden Square dominates the Warrington retail market, combined with strong out-of-town markets in Gemini and Westbrook. Some customer base is also lost to the Trafford Centre and Liverpool One. This competition has hit the Bridge Street hard. Horsemarket Street still sees interest however, and is retaining occupiers. Landlords for these units are having to be flexible on the rent and covenant to secure national and local occupiers. Rents have decreased 50-70 percent in the last couple of years. Another sticking point is business rates. In the view of this stakeholder, rate levels are dissuading potential occupiers from settling and not in correlation with the quality of the current offer. Demand is for units of 100 sqm (independent, small retailers) to 200 sqm (discount stores and larger retailers. Kiosk retailers normally require units of 50 sqm which are in limited supply.
Regional Agent	Demand is for units of 150 sqm, with limited demand for larger properties. Void rates on Bridge Street are high, with limited demand. This is partly the result of nearby developments in Time Square which have moved the prime retail area of the Town Centre away from Bridge Street. Overall rents are around £125/sqm, with 10 year leases sought. Local occupiers are generally seeking space on Sankey Street and Market Gate, the lower end of the market. Such retailers generally find Golden Square unaffordable. Also receive some enquiries come from current Golden Square occupiers heading towards lease events. Increasing rents and service charge at Golden Square are felt to be too high for some occupiers who considering space on Sankey Street and surrounds.
Regional Agent	Identify strong demand in South Warrington, exceeding the current supply in Stockton Heath and elsewhere. Would also wish to see some investment in smaller retail units in Warrington Town Centre, to complement broader proposals at Bridge Street and meet more immediate local needs. Would also wish to see a free parking scheme in retail centres comparable to that in Halton.

Source BE Group, 2016

- 9.15 Agents, consulted for this study feel that, the retail/leisure market in Warrington Town Centre is strongly affected by competition, both internal, between Golden Square and the Bridge Street area, and external, with Gemini Retail Park and strategically with Manchester and Liverpool. Most demand is from local independent retailers looking for shops of 100-200 sqm. Larger units may struggle to let while there is a shortage of kiosk type units of 50 sqm or less. Bridge Street is an area of limited demand at present, although there are pockets of stability within it. Rents and charges at Golden Square may be encouraging some retailers to look for more affordable premises elsewhere in the Town Centre. The regeneration of the Bridge Street Quarter is welcome although, the provision of some smaller scale retail options to meet immediate local needs.
- 9.16 Oxford forecasts that growth in retail sectors will generate a further 1100 jobs to 2037, from a 2016 base of 11,500. Cambridge Econometrics does not provide a breakdown for this sector.

Retail and Town Centre Land Supply

Warrington Retail Centre Report (2012)

- 9.17 The Warrington Retail Centre Report was completed in 2012 and pre-dates the Warrington Retail and Leisure Study. The Warrington Retail Centre Report set out a viability test of the current retail centres across Warrington and provided an evidence base for planning policy.
- 9.18 The report found that all three District Centres display strong vital and viable indicators. A large food store anchors each of the centres and all provide a range of other uses which are easily accessible. However, the Westbrook Centre could benefit from a broader offer. The report highlighted the success of the Stockton Heath evening economy which has continued to grow independently. The report also found that the environmental quality of each of the centres was positive.
- 9.19 In terms of the Neighbourhood Centres, all demonstrated a healthy, vital and viable role which was considered to be an of an appropriate scale in the overall hierarchy. Culcheth was noted to have grown organically, providing a night time economy offer as well, and is the largest of the Neighbourhood Centres.

9.20 The main threat to the retail hierarchy is potential development in locations outside of the defined retail centres. Any attempt to undertake development outside of the defined retail centres should therefore be resisted.

Town Centre Regeneration

9.21 A range of ambitious regeneration programmes are proposed in, and around, Warrington Town Centre. These are considered in Table 51 in terms of their likely impact on provision B-Class land and property. Warrington Waterfront and the Southern Gateway also impinge on the south of Town Centre, but these are considered separately in Sections 5.0 and 10.0.

Table 51 – Town Centre Regeneration Programmes

Programme	Description	Impact on B-Class Land/Premises
Stadium Quarter, Winwick Street /Dallam Lane Junction	<p>Stadium Quarter is a £190 million regeneration scheme to revitalise a 36.43 ha to the north of the town centre. The project will connect the bus interchange with the Warrington Wolves' Halliwell Jones Stadium and create a new mixed-use development of educational, business, leisure and housing uses.</p> <p>The University Technical College, linked to Manchester Metropolitan University, is under development to the south east of this site, with expected completion by September 2016.</p>	<p>The 4645 sqm incubator facility 'The Base', completed in January 2016 on Site 362: Former Dallam Day Centre, Dallam Lane (see Section 6.0).</p> <p>Masterplanning for the site proposes four further multi-storey office blocks of 4,366-7,246 sqm, totalling 23,224 sqm. Another 6750 sqm, in three further buildings is proposed in the longer term. Overall, this could provide another 1.4 ha of employment land within a broader mixed use scheme including leisure uses, a hotel and car parking.</p> <p>The development partners are planning to progress Blocks C and M as the second phase of the Masterplan to provide 11,612 sqm in 2016/2017. However, full delivery remains inhibited by multiple site ownerships which will need to be acquired by the Council.</p>
Bridge Street Quarter, Bridge Street/ Times Square	<p>The 'Bridge Street Quarter' is proposed for 4,000 sqm of retail, 9,200 sqm of leisure (including a cinema and seven family restaurants), a 4,200 sqm indoor market hall, a 10,000 sqm Council office building, a new 1,000 space multi-storey car park and a new public square.</p> <p>The Council has granted outline planning approval for the development as well as detailed planning consent for the Phase 1 demolition and remediation works, which are currently being carried</p>	<p>Plans here include a large office building for the Council. No offices for the private sector are currently proposed.</p>

Programme	Description	Impact on B-Class Land/Premises
	out on site	
Cabinet Works, Barbauld Street	The former Garnett Cabinet Works factory situated between Bridge Street and Warrington's Cultural Quarter. A masterplan is currently being drawn up for the site which will retain the existing landmark water tower and create a new opportunities and public areas.	It is understood that masterplanning options favour residential uses over B-Class employment here.

Source: BE Group and Warrington and Co., 2016

9.22 Other development sites in the Town Centre include:

- Former Forster Bespoke Furniture Site, Grey Street (0.70 ha) – Vacant former factory and open storage land, now largely in Council ownership. Subject to the relocation of an adjacent Council Waste Transfer Station, which is understood to be a medium term prospect, this prominent location off the A57 Manchester Road, represents a further development site, suitable for B-Class uses
- Land between McDonalds and Bathroom Showroom (Vacant plot in front of The Range), Winwick Road (0.30 ha) – The plot has been marketed for retail, and is surrounded by retail, hot food and trade uses. Any development here is likely to be for similar such uses
- Former Mr Smith's Night Club, Arpley Road/Wilson Patten Street (0.52 ha) – Site of a former night club, now cleared and ready for redevelopment. The land is located on a main road, A5061 Wilson Patten Street. However, while there are no firm plans for the redevelopment of this site at present, the owner's aspirations are for a multi-storey residential scheme with ground floor retail.

9.23 Office to residential conversions have not been considered in detail in this study. It is difficult to say how this will impact on Warrington Town Centre's office supply although some such proposals have been noted, including at Empire Court, Museum Street. It is likely to be less of an issue in Birchwood where most offices are in defined business park locations.

Retail in Employment Areas

9.24 Larger retail and leisure uses do overlap with B-Class employment in the south of Winwick Quay, with the Former Fiat Warehouse now being developed for terraced retail. This represents a loss of 5.31 ha of employment land. The Gemini Employment Area in Westbrook also accommodates mixed areas of retail, motor retail, leisure and

hot food use with recent development for such uses at Gemini 8 (see Section 6.0). The prospects for retail development in Omega are considered separately below.

Accommodation and Food Service Activities

- 9.25 The sector covers employment generated by hotel, bed and breakfast self-catering accommodation, as well as bars and restaurants. Both forecasts identify good growth prospects in this sector to 2037, ranging from 1,200 under Oxford to 3,500 under Cambridge. This is from a base of 8,300-8,900 jobs in 2016. The reason for this large difference is unclear, but both forecasts agree sectoral growth will be reasonably steady over the next 21 years. Oxford suggest that the bulk of the growth, 1,000 jobs, will be in food service activities rather than hotel accommodation
- 9.26 Demand for this sector is generated from both domestic, and to a lesser extent overseas tourism (hotels and restaurants), as well as spend by the Borough's residents (most likely to be restaurants and other catering). The nature of Warrington Borough also means that a reasonable portion of hotel demand will come from business travellers. Business hospitality will also support local restaurants, pubs and cafes.
- 9.27 The scale of the predicted sectoral growth means that there may be a need for modest provision of sites for hotel and food uses. A typical hotel site will be up to 0.5 ha, and may be grouped with other restaurant and roadside uses. However, most of Warrington's main Employment Areas are already served by hotels including the Pentahotel at Birchwood Park; Holiday Inn/Premier Inn at Junction 21, M6 (Woolston Grange); Premier Inn A49/Junction 9, M62 (Winwick Quay, Gemini); Premier Inn, Warrington Centre and Village Hotel (Centre Park). Hot food options can also be found at most of these locations, and there is prospect for modest further expansion of such uses at the entrance to Centre Park.
- 9.28 Further hotel/hot food development on existing Employment Areas is likely to be focused at Omega Phases One and Two, where there is outline consent for 11,150 sqm gross for a hotel and up to 1,200 sqm, for A1/A3/A4/A5 and D1 purposes. If all this floorspace was developed for non B-Class uses it would result in the loss of 3.17 ha of employment land. As noted above, proposals for the Stadium Quarter scheme also include provision of a hotel serving northern and central Warrington.

Education

- 9.29 This sector incorporates primary and secondary schools, further education colleges as well as commercial nurseries. Oxford Economics identifies that, in 2016, this sector employs 7,300 jobs and estimate a decline of 100 jobs to 2037. Cambridge Econometrics does not provide a specific breakdown of this sector.
- 9.30 Generally, population of Warrington is expected to expand over the next 20 years and this will lead to the need for additional spaces at schools in some areas of the town. Padgate is identified as an area with demand for further school places, while residential development at Omega Phase Three will generate further school demand. In addition, there has been a shift in education provision which has also resulted in additional education locations. In recent years the town has gained a 'Free School' and the University Technical College, in partnership with Manchester Metropolitan University, is under development south of The Base, off Dallam Lane. The differing provision of schooling may result in additional requirements in the future.
- 9.31 In recent years a number of Warrington schools have added sixth form provision and while demand for further education provision has increased generally. The Warrington Collegiate has recently undertaken some new build activities in its existing site. Apart from the Technical College, higher education provision is focused at the University of Chester's campus in Padgate, which includes some student accommodation blocks. There are no plans for major change in this campus, at the present time.
- 9.32 In summary, while education related employment is not forecast to grow in Warrington there may still be a need to accommodate additional education facilities. However, there is no assumption that any of this growth will take place on land currently proposed for B-Class employment use.

Human Health and Social Work Activities

- 9.33 Included within this sector are hospitals, medical centres, GP and dental surgeries, private or specialist healthcare (e.g. physiotherapy), veterinary practices and residential care homes. Oxford Economics forecast growth of 700 jobs locally from the current total of 800. Cambridge Econometrics does not provide a specific breakdown of this sector.

- 9.34 As is case elsewhere, an ageing and growing population will create additional demand for the Warrington and Halton NHS Trust. There are plans for additional redevelopment of the existing Warrington health campus but in a relatively constrained environment the provision of new services may be offered outside the Borough. There is an elective and day case surgery centre planned for the whole Trust area and based at Halton General Hospital. There is also the likelihood of additional cancer care provision being made available in Liverpool for the whole Liverpool City Region and Warrington area.

Arts Entertainment and Leisure

- 9.35 This sector includes, amongst other activities, forms of commercial leisure such as cinemas, theatres, bowling alleys, bingo halls and nightclubs. In Warrington these are focused in the Town Centre and north along the A49.
- 9.36 The growth in health awareness has seen an increase in demand for private health clubs and gyms and these are uses that will look to locate on business parks, industrial estates or retail parks either through new build or conversion of existing industrial space. Such facilities can range in size from 500 sqm to 2,000 sqm, which could translate to up to 1.5 ha of land with car parking. Such uses are evident in many of Warrington's Employment Areas, particularly Winwick Quay.
- 9.37 Oxford Economics forecast only modest growth in this sector, 100 extra jobs to 2037, from a 2016 base of 5,200. It was also a finding of the Warrington Retail and Leisure Study (2015), that the current local leisure offer is sufficient to meet needs. Taken together these findings do not suggest a need for significant further land allocations for leisure use in Warrington.

Summary

- 9.38 Jobs growth from non B-Class uses is forecast to focus in the retail and accommodation and food service sectors, although there is significant disagreement between the two forecasts about prospects for growth in the latter.
- 9.39 In terms of retail, demand for further 1,000-1,900 sqm of convenience goods space and 24,700-41,100 sqm of comparison goods space was noted in the Warrington Retail and Leisure Study (2015). The current leisure offer is likely to be sufficient to meet demand. Local agents report demand for units of 100-200 sqm and some shortages of smaller kiosk properties of up to 50 sqm. The Bridge Street Area is

identified as being of concern in terms of current levels of vacancy and lack of demand, although this location is the subject of ongoing regeneration investment which may address this.

- 9.40 In terms of land for B-Class uses in Warrington Town Centre, the Stadium Quarter Scheme is expected to deliver a further 1.4 ha of land, to be developed for seven multi-storey office premises totalling almost 30,000 sqm. In the Bridge Street Quarter, the only office development is earmarked for the exclusive use of the Council. Elsewhere, the Former Forster Bespoke Furniture Site, Grey Street, has the potential to deliver a further 0.70 ha of employment land, if site constraints can be overcome. Office to residential conversions may also have some impact on the supply of office premises in the Town Centre although the scale of that impact is difficult to assess.
- 9.41 At Winwick Quay, the former Fiat Warehouse is now being developed for terraced retail. This represents a further loss of 5.31 ha of employment land.
- 9.42 As noted, sizable growth in employment in the accommodation and food sectors, 1,200-3,500 jobs to 2037, is forecast. Evidence from the Oxford forecast suggests that this will be focused in the food sector, particularly as Warrington has a reasonable existing hotel offer linked to its main Employment Areas. New hotels are however proposed at Omega and at the Stadium Quarter in the Town Centre. The former, combined with retail options in Omega Phases One and Two would result in the loss of 3.17 ha of employment land if brought forward.
- 9.43 A modest decrease in employment in the education sector is forecast, although a growing population and major residential schemes, including that at Omega will require more investment in local schools. Higher and further education facilities in Warrington are continuing to modernise and develop, with completion of University Technical College key in 2016. This growth will not impact on the local supply of B-Class land, however.
- 9.44 Growth of 800 jobs is forecast by Oxford for the health sector to 2037. Further investment in local health services is expected, but again this is unlikely to impact on the supply of employment land.
- 9.45 In terms of arts, entertainment and leisure, the Oxford jobs forecast is modest for the recreational sector predicting an additional 100 jobs to 2036. The main impact on the

employment land supply from this sector is likely to be the reuse of premises for private health clubs and gyms, already a feature in areas such as Winwick Quay.

- 9.46 The loss of employment land to alternative uses is thus a significant issue in Warrington and is likely to continue to be so over the period to 2037. It is difficult to estimate the full scale of likely losses over the next 21 years, however, a reduction in the overall land supply resulting from this is one of the factors allowed for in the five-year buffer applied to OAN calculations in Section 8.0.

10.0 CONCLUSIONS

Introduction

- 10.1 This study has included a wide-ranging look at the factors affecting Warrington's economy, with particular reference to those that are likely to affect the future need for land and property within the Borough. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 11.0.
- 10.2 The study has been undertaken in line with both the National Planning Policy Framework and relevant Planning Practice Guidance. It updates and supersedes the Warrington's previous employment land evidence base documents, specifically the 2012 Warrington Employment Land Review.

The Functional Economic Market Area

- 10.3 In the view of this study, the FEMA for Warrington includes its immediate neighbours of Wigan, Trafford and Salford in Greater Manchester; Cheshire West and Chester, Cheshire East and particularly Halton and St Helens in the Liverpool City Region. Warrington also has good links with the nearby urban centres of Manchester and Liverpool. The other areas of Greater Manchester and the Liverpool City Region have more limited relationships with Warrington. All the local authorities within this FEMA have been consulted.
- 10.4 In the Cheshire and Warrington sub-region, sites in Birchwood Park now form part of the Cheshire Science Corridor Enterprise Zone with Thornton Science Park, Ellesmere Port and Alderley Park, Macclesfield. The three locations generally have differing sectoral foci which should minimise competition although there is some overlap between Thornton and Birchwood regarding energy sectors. In Cheshire East, Midpoint 18 has some potential to compete with Omega for B2/B8 requirements. Crewe is a sub-regional focus for public sector policy and investment, ultimately including HS2 infrastructure. The town's continuing economic development will have implications for Warrington.
- 10.5 Chester has the potential to compete with Warrington for larger office enquiries although stakeholders were far more concerned about the impact of Manchester. It was generally felt that Warrington is losing out on major new B1(a) requirements to

the City although few existing Warrington occupiers are moving into Manchester. In the industrial sector, nearby Trafford Park is a major competing area and Warrington is a significant net exporter of labour into Trafford.

- 10.6 Elsewhere in Greater Manchester Port Salford is likely to compete with Port Warrington for Canal-linked logistics uses. In Wigan, development of the 29 ha Pocket Nook Major Site, has the potential to create a sizable high quality business park on the A580 East Lancashire Road, relatively close to Birchwood. There are some obstacles to delivery here however.
- 10.7 In the Liverpool City Region, there is a clear link between Warrington and the Daresbury area of Halton, with large travel to work flows between the two locations. Stakeholders also identified Daresbury, along with Manchester, as Birchwood's main competitor for larger office requirements. In the industrial sector, stakeholders also highlighted an overlapping market for larger properties. Businesses will frequently have an area of search that can extend across Halton and Warrington. If Warrington lacks appropriate available premises it will lose out to its neighbour.
- 10.8 In St Helens, development of Parkside would create a Strategic Rail Freight Facility close to Warrington. This does offer some potential for competition although companies specifically needing a rail served site would not have Omega as an area of interest. It is also likely that the current phases of Omega will be largely complete once Parkside commences major delivery of premises and rather it will compete with future logistics sites in Warrington Borough.
- 10.9 The HCA/private owners are promoting land to the west of Omega, that sits within St Helens Borough, for employment uses. Although no decisions have been made regarding this option, if ultimately supported it would be accessed through the existing Omega site and represent a resource which would support the land needs of both Warrington and St Helens.
- 10.10 The latest research into the Port of Liverpool predicts increases in all areas of port trade. This will result in a need for 500 ha of land for logistics uses, over the next 20 years, in a catchment area that does include Warrington.

Economic Profile

- 10.11 The socio-economic profile of Warrington shows that the Borough had a 2014 population of 206,400. That population has grown by 10 percent over the last 20

years, a growth level well above LEP area and regional averages.

- 10.12 81.5 percent of the local workforce is active, above LEP area, regional or national averages. Unemployment, at 4.3 percent at the end of 2015, exceeds that of the LEP area although is lower than the regional or national average. In recent years Warrington has also been the net recipient of internal UK migration. Local skill levels are above most wider averages.
- 10.13 In 2014 there were 122,100 in employment in Warrington. Unlike many other local authorities in England, the largest employment sector is not health, education or retail but business administration with 16 percent of the total. This sector gained some 6000 jobs locally over 2009-2014. In GVA terms Warrington generates the largest proportion of its economy from distribution, transport, accommodation and food (20 percent).
- 10.14 More generally industries which are represented in Warrington to a greater extent than England, and have also generated growth since 1998, are business services, utilities, professional scientific and technical as well as transport. Transport is a sector that has demonstrated consistent growth over many years in Warrington whereas manufacturing has been equally consistent in its declining levels of employment. Over 1998-2014 transport employment has risen by over 2,000 jobs in the period and manufacturing has lost more than 4,000 jobs.
- 10.15 The largest increase in employment pre-recession was recorded by the public sector. In the period 1998-2008 the public sector added 10,400 jobs, although it has lost some 2,800 jobs in the years since 2008. Generally, however, Warrington is less reliant on public sector employment than England as a whole. Public sector employment in Warrington represents 15 percent of the workforce rather than 17 percent across England.
- 10.16 The number of VAT and PAYE registered businesses was 7,340 in 2015, equating to a business density of 57 per 1,000 working age residents. 87.7 percent of companies are micro-businesses (less than 10 employees). 97.6 percent employ up to 49 people (small businesses).
- 10.17 The overall local stock of businesses has been increasing over time and in Warrington the recorded growth was 20 percent over the last five years (Figure 17).

This growth in the number of businesses has outperformed the England rate of 17 percent growth over the same period.

Property Market Assessment

- 10.18 Nationally and regionally the prospect is for increased demand in all the main commercial sectors as the UK economy continues a period of growth. Increased demand following a period of limited development is generating stock shortfalls which are in turn encouraging development activity. For the first time since 2007 speculative development is a realistic prospect outside of prime city economies, albeit primarily for industrial and warehouse options, and demand for freehold options is growing both from occupiers and investors.
- 10.19 With Omega nearing capacity, it was the consensus of property market stakeholders that there is a need for further land allocations in Warrington. It was also broadly felt that these should include South Warrington, to take advantage of the key M56/M6 links, reflect current market interest and the lack of remaining supply along the M62 in North Warrington. While B8 logistics will remain a major element of land needs, sites are also needed to grow the office and industrial sectors.

Industrial Market

- 10.20 Nationally and regionally, market demand has grown steadily over 2013-2016, with no short or medium term prospects of it slowing. Against rising demand, the supply of stock continues to decrease. In the North West, as across much of the rest of the country, there is a dearth of good quality existing buildings in prime locations particularly for sub-1,000 sqm units and 'mid box' options of 5,000-10,000 sqm.
- 10.21 Warrington is following this broad growth trend, with 2015 seeing the highest number of industrial deals (84) of units of more than 200 sqm each, since records of local transaction rates began in 1998. Some modest provision of speculative units at Birchwood Park is also noted although this remains exceptional at this time.
- 10.22 The local market appears to require industrial units starting at 100 sqm and extending up to 1,000 sqm. Larger businesses are looking for industrial and warehouse units of 2,000-5,000 sqm. Demand, relative to supply, is felt to be particularly strong at Woolston Grange, and around Birchwood, although most of the main Employment Areas are performing well. There is also a lack of freehold options locally. Overall, the quality of local industrial stock is felt to be good, Gemini and

Winwick Quay are the only areas where concerns were raised. Rents for reasonable quality space are £54-65/sqm.

- 10.23 82,259 sqm of industrial space was vacant at July 2016 – 4.5 percent of the total floorspace and 6.8 percent by premises numbers. This is considered low in average supply terms and points to a lack of availability and choice. Overall, the supply was focused in Winwick and Woolston. There was a reasonable supply of good quality options at Winwick, Westbrook, Birchwood and Woolston. Budget options are mostly found in, and around, Warrington Town Centre. Freehold options were limited across the Borough.

Warehouse Market

- 10.24 Nationally, growth prospects for the warehouse/distribution property market remain good although overall demand over 2015 was lower than in 2014. Demand is expected to remain strong for prime logistics space, with the biggest online retailers continuing to fuel the demand.
- 10.25 Development at Omega has clearly been a key feature of Warrington's property market over the last three years and the strategic site has secured inward investment of regional and occasionally national scope. New build Omega distribution units' have commanded rents of £64/sqm, levels not achieved for distribution units in the North West previously. Demand appears to remain strong here and indeed deals for B2 and B8 development land at Omega have been taking place while this study was being completed.
- 10.26 The recent very high levels of take up at Omega partly reflect pent up demand in the regional market. The future is also expected to see greater competition for larger B2/B8 requirements regionally as other large schemes, such as Parkside, St Helens, are brought forward. However, stakeholders are broadly confident that demand for larger logistics/manufacturing sites in Warrington will continue. In part at least, this will be driven by growing levels of trade through the Port of Liverpool and related activity along the Manchester Ship Canal.
- 10.27 Developers are considering proposals for new employment strategic sites (B2/B8 uses) within Warrington Borough. The focus is around the existing Port of Warrington on the Manchester Ship Canal and land in South Warrington along the M56 Corridor. Realising either would require an adjustment to Warrington's Green Belt boundaries.

Office Market

- 10.28 Nationally, the office market remains more subdued than industrial and warehouse markets. However, Manchester remains an office centre of national importance that performed well in 2015. Generally, Manchester and Liverpool are benefitting from growth in financial and professional services, while locations such as Warrington and South Manchester are seeing increased demand from a broader range of sectors. In Warrington, dominant sectors include nuclear industries, with a growing prominence in construction and engineering. Nationally, increasing demand against a reducing stock of Grade A space is encouraging development although pressures are less intense in Manchester and Liverpool which retain reasonable development pipelines.
- 10.29 Speculative office development is still the exception and most office development still requires an element of pre-let or public sector funding to secure a start. However, it is slowing changing and indeed 2016 has seen completion of The Base in Warrington Town Centre as a speculative scheme.
- 10.30 Local office demand is primarily for suites of 0-500 sqm, in Birchwood and Warrington Town Centre. Larger requirements can extend to 2,000 sqm and tend to be focused at Birchwood only. There is limited Town Centre stock, relative to demand, while Birchwood lacks 1,000-2,000 sqm properties, particularly freehold options. The local office market appears to have recovered well from the national recession, with transaction rates, for units of greater than 200 sqm at least, at their highest levels since 2008 and headline rents approaching their previous peak of 2004. More generally, rents of £156-£161/sqm can be achieved for reasonable quality space. Stakeholders also report local business centres are performing well, with healthy demand for sub-50 sqm suites.
- 10.31 Overall, Warrington has a reasonable supply of office accommodation available – 65,738 sqm in 299 suites, which equates to a vacancy rate of 12.9 percent by floorspace. By number of premises the vacancy rate is 18.9 percent although this rate may be skewed by multi-let business centres which only count as single hereditaments in VO data. Reflecting stakeholder comments the supply of properties greater than 1,000 sqm is limited to five properties in Birchwood, none available freehold, and one at Woolston Grange. Town Centre space is focused in the 21-200 sqm range and concentrated in three business centres.

Employment Land Supply

10.32 Warrington's current potential employment land resource (at 31st March 2016) amounts to 231.87 ha, located across 30 sites. This comprises a local supply of 82.24 ha in 23 sites (35.5 percent of the floorspace total), a strategic supply of 149.63 ha in seven sites at Omega (64.5 percent). This supply has been reviewed in detail and the following sites judged unlikely to come forward for B-Class development:

Strategic Supply

- Omega Phase 3 Remainder (51.36 ha) – Now consented for housing.

Local Supply

- Site 216: Stanford House (Land at), Garratt Field, Birchwood (2.25 ha) – Consent for offices has now lapsed, landowner no longer interested in pursuing the scheme
- Site 324: Land at Cameron Court/Colville Court/Chetham Court, Winwick Quay (9.42 ha) – Landowner no longer interested in pursuing the scheme
- Site 353: 24 Kingsland Grange, Woolston (6.20 ha) - Consent for offices has now lapsed, landowner no longer interested in pursuing the scheme
- Site 355: Perstorp UK Ltd, Baronet Road, Latchford (1.51 ha) – Landowner no longer interested in pursuing the scheme
- Site 365: Calver Park, Calver Park Road (6.16 ha) – Although it may be subject to a revised planning consent, whole site now assumed lost to Sui-Generis motor retail uses
- Site 368: Plot 4 - Barleycastle Trading Estate, Lyncastle Road, Appleton Thorn (1.62 ha) – Consent has now lapsed, landowner no longer interested in pursuing the scheme
- Site 369: Tanyard Farm Estate, Rushgreen Road, Lymm (1.66 ha) – Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington
- Site 380: Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington (0.80 ha) – Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington
- Site 15 A(g): Phase 2 - Lingley Mere (9.37 ha) – Now consented for housing.

10.33 However, most of the above sites are within identified Employment Areas. Therefore, except for sites with relevant consents, they could not be developed for uses, other than B1/B2/B8 or relevant ancillary uses, without the appropriate justification.

10.34 Accounting for the above and also excluding land now developed, held to meet the needs of individual companies only, and any sub-areas within sites proposed for non B-Class uses, gives a realistic employment land supply of 104.53 ha in 14 sites of which 34.85 ha in 11 sites represents the local supply and just over two thirds, 69.68 ha in three sites, represents the strategic (Omega) supply.

Employment Areas

10.35 The Borough's existing 14 Local Employment Areas (i.e. excluding Omega) have been appraised and graded A-E, as defined in Table 52. Collectively they provide some 644.87 ha of brownfield land in B1/B2/B8 use in Warrington, increasing to 839.05 with Omega. Within this, the largest individual Local Employment Area is Birchwood (incorporating Birchwood Park), which comprises 152.40 ha. East Warrington generally contains 45.6 percent of the developed local land supply, 294.21 ha. Just over a quarter, 177.67 ha, is at Gemini and Winwick Quay.

Table 52 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect in the Local Plan Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible
E		

Source: BE Group 2016

10.36 Table 53 summarises the Employment Areas by each of the above grades. It is assumed that future growth will be focused around the nine flagship locations (Grade A or B). Areas graded B/C and C generally represent the Borough's supply of B1/B2/B8 premises for meeting local needs. They should be protected for that use.

Table 53 – Employment Areas' Appraisal by Category

Category	Number of Sites	Comments
<u>A and B</u> Key/ Flagship areas	9	<ul style="list-style-type: none"> • Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn • Birchwood (incorporating Birchwood Park) • Birchwood Boulevard • Centre Park • Gemini, Westbrook • Lingley Mere • Olympic Park, Birchwood • Winwick Quay • Woolston Grange. <p>The Borough's current 'flagship' locations, the focus for growth proposals and inward investment enquiries.</p>
<u>B/C and C</u> Fit-for-purpose local Employment Areas	3	Active and established industrial estates/business parks in the area, primarily catering to local business needs.
<u>C/D and D</u> Lower quality in residential/rural areas	3	Incorporates Phipps Lane, Burtonwood, the lowest graded Employment Area overall. In the long term the whole location may represent a redevelopment opportunity, to meet a range of needs appropriate to this small settlement location
<u>D/E and E</u> Areas of concern, requiring immediate attention or areas lost to other uses	-	No areas suffer from widespread vacancy and/or dereliction.
TOTAL	14	

Source: BE Group, 2016

10.37 It is not envisaged that large scale growth will take place at these locations, outside of the allocated employment sites. However, this study has identified a number of small scale 'regeneration opportunities' which have the potential to provide additional/alternative employment land, meet the growth needs of existing local firms or other requirements, specifically:

- Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn
– With a focus on open storage yards, along Lyncastle Road.

- Birchwood (incorporating Birchwood Park) – Trident Business Park may ultimately provide some redevelopment opportunities
- Centre Park – Consider the long term future of Spectra Business Park
- Holmsfield Road/Howley Lane, Howley – Further redevelopment opportunities may exist on peripheral sites
- New Cut Lane, Woolston – Modest infill options exist along New Cut Lane. Long term regeneration planning should consider if the whole area represents an option for change
- Phipps Lane, Burtonwood – Long term regeneration planning should consider if the whole area represents an option for change
- Winwick Quay – Some land remains in B-Class use around the former Fiat Warehouse, south of Cromwell Road.

Objectively Assessed Needs

- 10.38 There is no definitive model for forecasting future employment land need. Two ‘policy off’ based models have been used to assess future employment land provision. These are the projection forward of historic land take and a forecast based on employment sector change. All assessments of OAN relate to Warrington Borough only.
- 10.39 In terms of a ‘policy-on’ model, sensitivity testing has been undertaken to understand the forecast growth, above the baseline, outlined in the 2014 SEP and the LEP’s projections which form part of the devolution deal currently under negotiation.
- 10.40 Take-up data was obtained for the 1996-2016 period from the Council. This includes 109.74 ha of development at Omega. Omega is a strategic site with a market which is regional and national in scope, delivering B2 and B8 properties of an exceptional size in the local context. Accordingly, two forward projections of take-up have been undertaken – A strategic/local projection, inclusive of recent strategic Omega completions, with an average annual take up rate of 14.65 ha/year, and a local projection excluding Omega of 9.16 ha/year. Projected forward over 21 years, to 2037, the following need is identified:
- Strategic/Local Take Up Trend: $14.65 \text{ ha/year} \times 21 \text{ (years)} = 307.65 \text{ ha}$
 - Local Take Up Trend: $9.16 \text{ ha/year} \times 21 \text{ (years)} = 192.36 \text{ ha}$

- 10.41 The Borough should also have a buffer to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2037 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2037. A buffer of five years has been applied. Based on the historic take-up trend this would generate a further land need of 73.25 ha under the strategic/local model, 45.80 ha under the local only model.
- 10.42 When measured against realistic supply, it is clear that Warrington has insufficient land available to meet needs to 2037 (plus a buffer). To summarise:
- Strategic/Local Take Up Trend, plus a buffer: 380.90 ha – 104.53 ha (realistic supply, strategic and local combined) = 276.37 ha (further need)
 - Local Take Up Trend, plus a buffer: 238.16 ha – 34.85 ha (realistic supply, local only) = 203.31 ha (further need).
- 10.43 The employment based forecasts suggest the following in terms of future employment land provision to 2037 (Table 54).

Table 54 – Employment Based Forecast 2016-2037*

Growth Sectors	Oxford Economics	Cambridge Econometrics
Total Floorspace, sqm	252,648	229,296
Divided by Development Floorspace per ha	3,900	3,900
Equivalent Employment Land Needed, ha	64.78	58.79

Sectors in Decline	Oxford Economics	Cambridge Econometrics
Total Floorspace, sqm	(90,920)	(136,360)
Divided by Development Floorspace per ha	3,900	3,900
Equivalent Employment Land Reduction, ha	(23.31)	(34.96)
<i>Net Land Need, ha</i>	<i>41.47</i>	<i>23.83</i>

Source: BE Group, 2016

*Figures in brackets are negative, i.e. jobs/property/land losses

- 10.44 The forecasts consider baseline local jobs only and accordingly are compared against Warrington's local land supply only. Against that realistic local supply (34.85 ha) Warrington continues to have a supply deficit under most scenarios albeit a far smaller one than under the take-up models.

- 10.45 The strongest growth sectors in both forecasts is in the financial and business services sector with between 10,400 and 11,100 jobs forecast to be created before 2037. Both forecasts also predict an increase (albeit more modest) in employment in Information and Communication, Government Services and Other Services. This growth does reflect national trends and also what is predicted to happen in the region. For Warrington, this suggests ongoing growth in the local service sector economy which is particularly focused around Birchwood. In property terms almost all this growth will be in in the B1 office sector.
- 10.46 Construction is also projected to see jobs growth, with Oxford Economics showing a much higher level than Cambridge Econometrics.
- 10.47 Both forecasts predict reasonable growth in transport and storage, distribution of 2500-2600 jobs which highlights the likely ongoing strength of logistics in the Warrington economy. This is without accounting for 'policy on' initiatives such as Atlantic Gateway which provide further B8 growth potential.

Sensitivity Testing

- 10.48 The 2014 SEP target is that by 2030 Cheshire and Warrington would become a £35 billion economy generating 75,000 extra jobs. Based on the current split of employment across the sub-region, 26.6 percent of that growth could be in Warrington Borough, a gain of 19,950 jobs by 2030.
- 10.49 This 'policy on' position is no more ambitious than the baseline forecast position predicted by Oxford Economics to 2030, 19,000 extra, and indeed is much less ambitious than the gain of 24,720 jobs forecast by Cambridge Econometrics for the same period. Thus applying a 'policy on' scenario incorporating the SEP target would not deliver a jobs to land target significantly different from those set out above. On this basis the SEP reinforces the requirements shown above rather than offering a sensitivity variation.
- 10.50 In addition to the SEP, over 2015/16, negotiations have been underway (although stalled at the time of writing) regarding a devolution deal for Cheshire and Warrington. The deal proposes a Warrington New City, generating 55,000 new jobs over 2015-2040. However, this target would be across an economic hinterland extending beyond the Warrington Local Authority Area. If Warrington Borough ultimately secures 26.6 percent of the employment growth predicted in the Devolution

Bid, equal to its current share of the sub-regional economy, the increase in employment in Warrington will be 29,728 over the study period 2016-2037.

10.51 No sectoral split of this growth is set out in policy, but, based on SEP targets it is assumed most jobs generation will be in transport and logistics, business services and technical activities. Measured against the more ambitious of the two baseline forecasts, Cambridge Econometrics, the deal is forecast to provide a further 11,428 jobs to 2037. This can be translated to an additional land requirement of 56.68 ha.

Scenario Testing

10.52 The employment methods of forecasting, both policy on and policy off make no allowance for a range of practical issues such as the extent that growth in office employment takes place in town centre locations, at higher densities, rather than in low-density business parks. Also that land take-up/property needs can be for different reasons such as modernisation or geographic relocation or that expansion may also be within existing premises or on expansion land not accounted for in land allocations. Past experience also suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate, and improved productivity could lead to additional need.

10.53 It is therefore considered that the land requirements' calculations can represent a misleading position. To test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land need based on employment change has been calculated for two historic periods. For this analysis, just Cambridge Econometrics baseline (policy-off) forecasts are used, as subject to minor variances, the historic jobs figures of the two forecasts are similar:

- The long term period from 1996-2016 and compared to the actual land take-up during that period (Table 55)
- 2000-2007 which was a period of sustained economic growth nationally (Table 56).

Table 55 – Employment Land Take-Up/Employment Change Comparison 1996-2016 (Cambridge Econometrics)*

Employment Change	Total Jobs	Land (Ha)
Growth	516,672	132.48
Decline	(467,340)	(119.83)
Net growth	49,332	12.65
Historic land take-up	-	292.97 (183.23 less omega)

Source: Cambridge Econometrics, WBC, BE Group, 2016

*Figures in brackets are negative, i.e. jobs/property/land losses.

Table 56 – Employment Land Take-Up/Employment Change Comparison 2000-2007 (Cambridge Econometrics)*

Employment Change	Total Jobs	Land (Ha)
Growth	99,804	25.59
Decline	(98,844)	(25.34)
Net growth	960	0.25
Historic land take-up	-	81.99

Source: Cambridge Econometrics, Sefton Council, BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

- 10.54 The two tables show that baseline forecasting predicted levels of land development over the last 20 years that were negligible compared to the levels of take-up really achieved. The trend shows that net jobs growth is not an accurate method of calculating land, with far more land being developed than was calculated from the jobs prediction, even when sectors forecast to grow only are considered.
- 10.55 A summary of the take up and policy-on/policy-off forecast scenarios, for Warrington Borough, is set out in Table 57.
- 10.56 The variation in the outcome figures demonstrates the uncertainty of forecasting. The outputs range from an oversupply of 5.35 ha to a shortfall of 276.37 ha, even ignoring policy-on sensitivity testing. However, from the market assessment and also reviewing the historic trends in employment change and land take up, the conclusion is that the employment based forecasts underestimate land need significantly. When a comparison of past employment change over the period 1996-2016 is made, actual land take-up is far higher than the estimate that even the growth only sectors suggest. Finally, the locally based jobs targets cannot allow for the strategic growth potential of Omega.

10.57 In conclusion, it is considered that the most appropriate forecasts are based on the historic take-up rates. The need to plan for strategic as well as local growth in the Borough favours the Strategic/Local Take Up model over the Local only forecast. This indicates a sizable shortfall in Warrington's employment land supply of employment land, equating to 276.37 ha to 2037.

10.58 As the Devolution Bid figures are based on an extrapolation of jobs growth it cannot be applied to the take-up scenarios. It is also noted that projecting historic take-up figures forward suggests levels of land need well in excess of the employment based modelling, even if the ambitious policy-on targets of the Devolution Bid are included.

Table 57 – Warrington Borough Land Forecast Models – Summary

Model	Land Stock 2016, ha – Strategic and/or Local Supply*	Land Need 2016-2037, ha	Buffer (five years further need) ha	Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for Devolution Bid**	Assumptions
Strategic/ Local Take Up	104.53 Strategic/ local supply	307.65	73.25	(276.37)	-	Based on historic (20 years) take-up of 14.65 ha/pa. Inclusive of take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture Devolution Bid figure not applicable to take-up scenarios Of the shortfall in this scenario: <ul style="list-style-type: none"> • 117.14 ha is primarily strategic (B8 uses) • 159.23 ha is primarily local in nature.
Local Take Up	34.85 Local supply	192.36	45.80	(203.31)	-	Based on historic (20 years) take-up of 9.16 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture Devolution Bid figure not applicable to take-up scenarios

Model	Land Stock 2016, ha – Strategic and/or Local Supply*	Land Need 2016-2037, ha	Buffer (five years further need) ha	Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for Devolution Bid**	Assumptions
Employment based on adjusted stock – Oxford Economics Model	34.85 Local supply	+64.78 Growth +41.47 Change	+15.42 +9.87	1) (45.35) 2) (16.49)	1) (102.03) 2) (73.17)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario
Employment based on adjusted stock – Cambridge Econometrics Model	34.85 Local supply	+58.79 Growth +23.83 Change	+14.00 +5.67	1) (37.94) 2) 5.35	1) (94.62) 2) (51.33)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore 2016

*Realistic land supply at 31st March 2016

**Further 56.68 ha of land need.

10.59 Warrington's previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 58 applies the same proportionate split to the Borough's projected needs against supply, to 2037. It shows the bulk of the need is for B8 land, including strategic requirements, but also with a sizable B1(a) office requirement.

Table 58 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
Percentage Inclusive of Omega	27.2	-	5.7	7.4	52.6	7.1	100.0
Strategic/Local Take Up Trend	103.60	-	21.71	28.19	200.35	27.05	380.90
2016 Realistic Supply, by Use Class*	30.46	-	35.17**		35.72**	3.18	104.53
Further Needs	73.14	-	14.73		164.63	23.87	276.37

Source: WBC/BE Group, 2016

*Strategic and Local Supply. **For the purposes of this exercise, the remaining strategic B2/B8 supply at Omega is split evenly between those two uses.

Non B-Class Uses

- 10.60 Forecasting suggests that relevant non B-Class uses (retail; accommodation and food service activities; education; human health and social work activities; arts, entertainment and recreation) could provide 3,000 more jobs in Warrington by 2037, with retail and accommodation and food service activities showing the strongest growth prospects.
- 10.61 In terms of retail, local agents report demand for units of 100-200 sqm and some shortages of smaller kiosk properties of up to 50 sqm. The Bridge Street Area is identified as being of concern in terms of current levels of vacancy and lack of demand, although this location is the subject of ongoing regeneration investment which should help address this.
- 10.62 Town Centre regeneration plans include the delivery of a further 1.4 ha of land, to be developed for seven multi-storey office premises totalling almost 30,000 sqm at the Stadium Quarter. Prospects for further expansion of this site east to the A49 do exist although land ownerships represent a significant barrier. Several small infill sites exist in, and around, the Town Centre which could provide some B-Class development opportunities although most are expected to come forward for retail-led options.
- 10.63 Elsewhere the issue is with employment land lost to alternative uses. Most recently this includes 5.31 ha of employment land at Winwick Quay lost to retail, while some Town Centre office sites and properties have been lost, primarily to residential schemes. Proposals at Omega would result in the further loss of 3.17 ha of employment land to alternative uses, if brought forward as currently envisioned.
- 10.64 Uses that may be located on active employment land are likely to include gyms, small scale medical and veterinary clinics, petrol filling stations and food outlets. Clearly losses of B1/B2/B8 land to other uses are an ongoing issue in Warrington although it is difficult to estimate the full scale of loss which could occur to 2037. Accounting for such losses is one of the reasons why a five-year buffer of additional take up is applied to needs calculations, as described above.

11.0 RECOMMENDATIONS

11.1 This section sets out the consultants' recommendations arising from the Economic Development Needs Study. The recommendations in this report have had full regard to the requirements of the NPPF to encourage and deliver growth through the planning system. It updates and supersedes Warrington's previous Employment Land Studies.

Employment Land Supply

Recommendation 1 – Employment Land Provision Definition

11.2 The NPPF does not define employment land provision within the main document. However, Annex 2 defines economic development as *“development, including those uses within the B use classes, public and community uses and main town centre uses (but excluding housing development)”*.

11.3 For the purpose of this study, the current available land supply in Warrington is defined as 30 sites as at 31st March 2016. These comprise a local supply of 82.24 ha in 23 sites and a strategic supply of 149.63 ha in seven sites at Omega as identified in Section 6.0 Table 24. Employment land site proformas for the 30 sites are included within Appendix 3.

Recommendation 2 – Employment Areas to be Retained

11.4 The NPPF provides the opportunity for Warrington Borough Council to identify 'key employment sites' that are considered to significantly contribute to the Borough's land supply for B-Class uses. It enables these to be safeguarded for B-Class uses and other employment uses which achieve economic enhancement without detrimental impact to either the site or the wider area. Based on this Study's grading of Local Employment Areas, the following locations are above average in quality and could be designated as 'key' sites:

- Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn
- Birchwood (incorporating Birchwood Park)
- Birchwood Boulevard
- Centre Park
- Gemini, Westbrook

- Lingley Mere
- Olympic Park, Birchwood
- Winwick Quay
- Woolston Grange.

- 11.5 At the strategic level, Omega could also be included in this list.
- 11.6 Within these areas, only applications for B-Class use should generally be permitted. Non-B Class uses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. It is accepted that on rare occasions some exceptions may have to be made, for example to provide for a complimentary services offer in Omega. Such development should however not prejudice the efficient and effective uses of the remainder of the employment area.
- 11.7 General retail uses should not normally be supported on employment areas unless justified by exceptional circumstances and clearly ancillary to the main B-Class uses. Where alternative uses are considered, the general priority should be linked uses such as car showrooms, tyre and exhaust centres, or trade counters, providing the employment areas have good access to a range of sustainable transport options.
- 11.8 Where non-B Class uses are proposed for, or within, such areas then the Council should require the applicants to demonstrate that:
- The site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and
 - The site/premises has been proactively marketed for employment purposes for a reasonable period of time (a minimum of twelve months) at a reasonable market rate (i.e. rent or capital value) as supported through a documented formal marketing strategy and campaign, or
 - There will be a significant community benefit which outweighs the impact of losing the employment site/premises.
- 11.9 For the 3 Employment Areas graded C/D or D, a more flexible approach could be taken to help facilitate a broad range of economic development, which is vital for the future sustainability and development of the local area's economy. In some cases, the size, location and characteristics of a site may mean that a development for non-B Class uses could provide greater benefit to the local community, in terms of

addressing local needs, than if the site was retained solely in B1/B2/B8 employment use.

11.10 Warrington Borough Council should also recognise the increasing level of precedents of non-B use employment activity provision within employment areas across the UK. Sui generis uses, such as vets' practices, and D1 non-residential institutions including training centres, nurseries/children's play facilities and activity centres do generate employment opportunities. Such applications within the Borough should be treated on their individual merits, including employment outputs, but should be restricted to the Employment Areas graded B/C to D.

11.11 It is suggested that in terms of protecting employment sites that do not sit within Employment Areas, the redevelopment of employment land and premises for non B-Class employment uses be allowed in the following circumstances:

- The present (or previous, if vacant or derelict) use causes significant harm to the character or amenities of the surrounding area, and it is demonstrated that no other appropriate viable alternative B1/B2/B8 employment uses could be attracted to the site, or
- Mixed-use redevelopment would provide important community and/or regeneration benefits with no significant loss of jobs, potential jobs, and the proposed mix of uses accords with other planning policies.

11.12 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed use developments inappropriate on particular employment areas. It is clearly for Warrington Borough Council to judge proposals on their merits taking account of these factors.

Recommendation 3 – Sites Not Deliverable for Primarily B-Class Schemes

11.13 In Section 6.0, Warrington's baseline land supply was reviewed in detail. The research identified several employment sites which do not appear to be viable and deliverable for B1/B2/B8 uses. They should not be counted as part of the Borough's supply of employment land in future monitoring or included in any Local Plan allocations for B-Class uses. Most prominent amongst these is Omega Phase 3 Remainder (51.36 ha) which is now consented for housing. Nine further local sites are identified in Section 10.0 Conclusions as unlikely to deliver additional employment uses for the Borough, although in most cases they remain within the Borough's Employment Areas (as identified in the Core Strategy Proposals Map

under Policy PV1) and could not be developed for non B-Class uses without the appropriate justification.

Recommendation 4 – Future Employment Land Provision

11.14 The identified realistic land supply of 104.53 ha, at 31st March 2016, is not sufficient to meet needs over the period 2016-2037 even if a five-year buffer is excluded. Based on the Strategic/Local Take Up rate the shortfall is 276.37 ha. Against a Local only take-up model, the surplus reduces to 203.31 ha.

11.15 The forecasts of industry sector activity (jobs), suggest even much more modest land needs and even a degree of surplus. The need on these models is increased if an allowance is made for the Devolution Bid, generating additional requirements ranging from 51-102 ha.

11.16 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision up to 2037. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Other issues include:

- That within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
- That there will be local market churn
- That there will be need to maintain a choice of supply by size, type, location and quality of sites and premises for businesses at differing levels of their maturity
- That there should be a continuing forward supply to accommodate site development beyond 2037
- The level and nature of the existing employment land supply at 31st March 2016.

11.17 The Devolution Bid Sensitivity Test whilst irrelevant if an agreement on devolution cannot be secured does set out an agenda for growth and Warrington should consider this as aspiration even if it does not proceed as envisioned in Section 9.0.

11.18 It is therefore recommended that Warrington Borough Council use the roll forward of historic take-up as the main measure of Warrington's future land need for the period up to 2037. The Strategic/Local Take Up Model best

accounts for the full range of need the Borough will face over the next 21 years. This indicates a need of 380.90 ha to 2037, incorporating a five-year buffer. Measured against the Borough’s current realistic supply there is a shortfall of 276.37 ha.

11.19 Warrington’s previous take up and realistic supply can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 59 applies the same proportionate split to the land supply shortfall, to 2037, and shows that the strongest needs are for B8 warehousing land, followed by B1(a) offices. The industrial requirement is comparatively more modest.

Table 59 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	Mixed	
Further Needs	73.14	-	14.73		164.63	23.87	276.37

Source: WBC/BE Group, 2016

11.20 However in reality, modern companies frequently require a mix of office, industrial and storage space, tailored to their individual needs. The full range of needs which may emerge cannot be predicted in advance and indeed the requirements of companies change as they grow. Demand from different sectors will also fluctuate over the lifetime of the Local Plan. Thus policy should avoid proscriptions on what B-Class uses can or cannot locate on employment sites, unless there are specific environmental reasons for excluding some uses, such as the proximity of land to housing.

Recommendation 5 – Protecting Key Local Plan Employment Sites

11.21 The needs calculations above show that Warrington has a sizable land shortfall to 2037. This shortfall is exacerbated by recent large scale losses of employment land to non B-Class uses, including 51.36 ha in Omega Phase Three, a third of the baseline supply at Omega, and 9.37 ha at Lingley Mere, 61 percent of the supply in that Employment Area. Given the low, and reducing, land supply against need, there is a strong incentive to protect the remaining employment sites for B1/B2/B8 uses.

11.22 Protection of the remaining employment land for B1/B2/B8 development, particularly key sites and defined employment areas, needs to be considered a

policy priority. Further losses in the land supply, to alternative uses, should be resisted.

Recommendation 6 – Meeting Needs

- 11.23 A need of 276.37 ha above current supply levels is identified. A key task for the Local Plan will therefore be to identify further locations for B1/B2/B8 provision. Based on study research Table 60 outlines the locational requirements of each B-Class land use.

Recommendation 7 – Future Reviews

- 11.24 This report has shown how market conditions in Warrington have changed significantly in only the three years since the end of the recession. In addition, this study has suggested a need for further large land allocations to 2037, while take up on many of Warrington's existing large sites is ongoing. In view of these factors, Warrington should review its employment land portfolio at intervals of around five years. This is also in accordance with the NPPF which recommends regular monitoring and review of the local land supply to ensure a robust evidence base.

Recommendation 8 – Maintain Awareness of External Influences

- 11.25 As a first point, Warrington Borough Council must recognise its role, together with its neighbours, in developing the economy of its FEMA. In this respect, they are interconnected, to varying degrees, on several levels.
- 11.26 Warrington clearly has links with the two Cheshire local authority area, including the shared Enterprise Zone. However, linkages are just as strong with Manchester, a major competitor for strategic office requirements and Trafford, which is a significant importer of labour from Warrington. In the Liverpool City Region, Halton and Warrington have a strong interrelationship around Daresbury and an industrial market which overlaps in place. Port growth in the City Region is likely to boost logistics demand across a broader market area, including Warrington, with related expansion along the Manchester Ship Canal. Accordingly, a high level of joint working between these authorities and Warrington Borough Council is advisable and should be continued.

Table 60 – Locational Land Needs

Need by Use Class, ha	Locational Needs	Areas of Search
<p>B1(a): 73.14</p>	<ul style="list-style-type: none"> • Stakeholders report reasonable demand for sub-500 sqm units in Warrington Town Centre, particularly for freehold options • In addition to the completed 'The Base', the Stadium Quarter will provide larger floorplate offices but there remains a demand for smaller units and multi-occupancy serviced schemes serving the local micro business market. Infill and refurbishment opportunities for further office provision in the Town Centre should therefore be encouraged • It is assumed most provision over the period to 2037 will link to the established Town Centre regeneration programmes including the Stadium Quarter (with options for further expansion east of Winwick Road), Southern Gateway and Warrington Waterfront • However, the market for larger offices, up to 2,000 sqm, and including most inward investment, remains strongly focused in Birchwood • This is not expected to change over the period to 2037 and indeed stakeholders argued against creating a new office centre elsewhere in the Borough that would split and dilute the Birchwood offer in the face of strong competition from Manchester • Accordingly, the bulk of the land provision should be focused around Birchwood • There appears limited scope for further infill development, for offices, in Birchwood. All undeveloped plots in Birchwood Park are accounted for in the current employment land supply • The scale of the requirement would support additional employment land in the existing Birchwood Employment Area as possible to benefit from the existing critical mass of premises, services and road linkages • Locations north of Junction 11, M62 would be an option, but sites south of Birchwood and east of the M6 (Rixton area) could also support industrial/warehouse requirements linked to Woolston Grange, discussed below • Sites will need to be of a size and scope to allow the development of individual office plots of up to 0.5 ha each which could be brought forward individually, or in combined schemes, and have the flexibility to combine or sub-divide, to meet specific requirements. The quality of infrastructure and general environment would need to be high to allow the location to be competitively marketed, and strong links to the existing services of Birchwood/Woolston (or to new services) and Birchwood Station would be preferable. 	<p>Warrington Town Centre and periphery East Warrington – North or south of Birchwood</p>
<p>B1(c)/B2: 14.73</p>	<ul style="list-style-type: none"> • At the strategic level there will be some overlap with the B8 requirements discussed below • In terms of meeting local demand, stakeholders support greater provision in East Warrington, reflecting the existing critical mass of premises and strong strategic road connections • Woolston Grange remains a focus for demand for both light and general industrial space. Demand outweighs supply both for land and property • Infill opportunities within Woolston Grange appear limited, but options to expand the Employment Area should be considered • Birchwood is also identified as a strong location for further industrial land provision, as evidenced by the recent success of speculatively delivered B2/B8 units in Birchwood Park • There may be some scope for redevelopment and infill within the existing industrial estates of the area. Trident Business Park is identified as a location which contains older premises, potentially suited for selective redevelopment 	<p>East Warrington – Locations in and around Birchwood and Woolston Grange M56 Corridor Focused at Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn</p>

Need by Use Class, ha	Locational Needs	Areas of Search
	<ul style="list-style-type: none"> • There was also strong stakeholder support for further local industrial opportunities in South Warrington, alongside the strategic provision discussed below. This would take advantage of the M56 Motorway Corridor and provide new employment opportunities in the south of the Borough, balancing historic focus on the north and east • Some older buildings in Barleycastle Trading Estate are reaching the end of their economic lives and could be subject to redevelopment/major refurbishment. However, the main growth opportunities are likely to be found in the development of the open storage yards in the south of the area, along Lyncastle Road. There appears to be prospects for delivering further brownfield employment sites here. Sites should be of a size and configuration to allow the delivery of both light industrial units of up to 1,000 sqm and general industrial units of up to 5,000 sqm each, to meet both local and sub-regional demand. The latter will require plots of up to 1.3 ha each and sites should have the flexibility for sub-division to allow the delivery of either smaller terraced schemes or single larger units for design and build/speculative provision. 	
<p>B8 Strategic Need: 117.14</p>	<ul style="list-style-type: none"> • It is assumed strategic need will be primarily for storage and distribution space although experience at Omega shows there will be some overlap between B2 and B8 uses • It is assumed future strategic take up will reflect recent development at Omega, i.e. will comprise ongoing requirements for large regional and national production/distribution facilities wanting sites of 5-10 ha (or larger) to accommodate single 'big shed' properties. Employment sites allocated to meet this need will therefore need to be of a size and shape capable of meeting such large single requirements and have the internal flexibility to combine or sub-divide plots as required • The Asda development at Omega South took up 43 ha of land (gross) and likely represents the largest single development strategic sites in Warrington will need to accommodate. Individual strategic sites will therefore have to be at least this size, and ideally larger, to ensure they can meet all plausible requirements • Most logistics in Warrington is 100 percent road related and immediate motorway access is essential for any site looking to replicate the success of Omega and compete with other emerging motorway linked schemes elsewhere in the North West. • Locations on the M62, which link to the existing critical mass of Omega would be desirable for new strategic sites. However, it is accepted that there is limited capacity for a further site of the scale required in this area, particularly south of the M62 • Stakeholders showed strong support for the provision of a new strategic site(s) along the M56 Corridor. Although this would likely require some Green Belt release the advantages were felt to include a greater body of potentially available land; links to the crucial Manchester-North Wales Corridor; the ability to build on the existing logistics base of Barleycastle Trading Estate/Stretton Green Distribution Park and the ability to provide greater employment opportunities in the south of the Borough • 24-hr operation is also essential for many modern production and logistics operations and this, combined with the scale of likely buildings proposed means that locations close to housing, or other sensitive uses should be avoided • Relevant local and internal access roads will also need to be able to support activities with high levels of HGV and general traffic. 	<p>M62 Corridor M56 Corridor Port Warrington and surroundings (additional to the above)</p>

Need by Use Class, ha	Locational Needs	Areas of Search
	<p>Port Related</p> <ul style="list-style-type: none"> • A sub-set of the general need, focused on the Manchester Ship Canal and Port Warrington. The Liverpool LEP expect traffic along the Ship Canal to reach 30,000 containers a day, while growth pressures are already in evidence at Port Runcorn, which is now at capacity, and Port Salford which is seeing further development of food logistics. • There is no data on the specific future requirements of Port Warrington however, owners Peel note they have some 14 ha of expansion land at the Port and but will then require Green Belt release, as part of a broader scheme, to meet needs. 	
<p>B8 Local Need: 47.49</p>	<ul style="list-style-type: none"> • Local warehousing demand is generally for properties of up to 5,000 sqm, on sites of up to or over 1.3 ha • At the larger end, the locational needs of local B8 space will generally overlap with strategic, with general logistics looking to the M62/M56 Corridors and any port related looking to Port Warrington • Smaller scale need will overlap with B1(c)/B2 requirements as many larger manufacturing operations now incorporate elements of B8 storage • Woolston Grange has been a historic centre for small-mid-sized logistics operations and although it has recently lost out to Omega for some larger requirements, it is expected to remain a centre for B8 operations. In South Warrington, Barleycastle Trading Estate/Stretton Green Distribution Park support an established cluster of logistics operations, focused around facilities for national operators such as Stobart Group, Iron Mountain and DPD. Future B8 land allocations should look to build on these established locations • Given the scale of requirement it is assumed that most of the need will not be met through infill development, but rather through new large allocations in East and South Warrington, as discussed above. • As with strategic need, the requirement is for large flexible sites which link to the strategic road network and are in locations which can support increased HGV traffic. Locations must also have the flexibility to support mixed B2/B8 uses. 	<p>M62 Corridor M56 Corridor Port Warrington and surroundings (additional to the above)</p> <p>East Warrington – Locations in and around Birchwood and Woolston Grange M56 Corridor Focused at Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn</p>
<p>Mixed: 23.87</p>	<ul style="list-style-type: none"> • Although land need is described as mixed, it is assumed the majority of take up will be for B1(c), B2 or smaller B8 space • This will be subject to the same locational requirements as the other local industrial-warehouse uses described above. 	<p>East Warrington – Locations in and around Birchwood and Woolston Grange M56 Corridor Focused at Barleycastle Trading Estate/Stretton Green Distribution Park, Appleton Thorn</p>

Source: BE Group, 2016

Appendix 1

List of Consultees

Appendix 1 – List of Consultees

Altus Eileen Bilton	Muse Developments
Appleton Parish Council	Network Space
B8 Real Estate	NHS Property
Bilfinger GVA	Orbit Developments
CB Richard Ellis	Patrizia (Birchwood Park)
Cheshire and Warrington Local Enterprise Partnership	Peel Properties/Peel Ports
Cheshire East Council	PIN Properties
Cheshire West and Chester Council	Priestley College
Colliers	RAM Properties
Halton Borough Council	Read Property Associates
Hitchcock and Wright	Regus UK
Homes and Communities Agency	Salford City Council
Jones Lang LaSalle	St Helens Metropolitan Borough Council
Knight Frank	St Modwen
Lambert Smith Hampton	Trafford Council
Legat Owen	United Utilities
Liverpool City Council	University of Chester
Liverpool Local Enterprise Partnership	UTC Warrington
Manchester City Council	Warrington Borough Council/Warrington and Co.
Maro Developments	Warrington Collegiate
Miller Developments	WHR Property Consultants
Morgan Williams	Wigan Council

Appendix 2

Warrington Vacant Property Schedules

Appendix 2 – Vacant Property Schedules

Table A2.1 – Schedule of Industrial Premises

INDUSTRIAL				
Property	Area	Tenure	Quality	Size, Sqm
Kingsland123, Kingsland Grange	Woolston	LH	Good	11,427
Melbury Court, Clayton Road Industrial Estate	Birchwood	LH/FH	Good	5,304
Dallam 1, Folly Lane	Town Centre	LH	Moderate	4,805
Unit 1, Eagle Park, Hawleys Lane	Winwick	LH	Good	2,904
Unit 10, Stretton Green Distribution Park	Appleton	LH	Moderate	2,272
Unit 713, Cavendish Place	Birchwood	LH	Good	2,004
Unit 15, Chesford Grange	Woolston	LH	Good	1,990
Unit 2 Asher Court, Barleycastle Trading Estate,	Appleton	LH	Moderate	1,835
Unit 3 Heaton Court, Risley Road	Birchwood	LH	Good	1,676
Unit 4C, Stretton Industrial Estate	Appleton	LH/FH	Moderate	1,672
Unit 2 Heaton Court, Risley Road	Birchwood	LH	Good	1,454
Unit 8, Bishops Court	Winwick	LH	Good	1,368
Unit 5, Westway 21, Chesford Grange	Woolston	LH	Moderate	1,328
Unit 711, Cavendish Place	Birchwood	LH	Good	1,292
Unit 3, Bishops Court	Winwick	LH	Good	1,281
Units 3-9, Chetham Court	Winwick	LH	Good	1,269
Unit 6, Bishops Court	Winwick	LH	Good	1,258
Unit 12, Cameron Court	Winwick	LH	Good	1,246
Unit 4A, Stretton Industrial Estate	Appleton	LH/FH	Moderate	1,163
Unit 1, Bishops Court	Winwick	LH	Good	1,147
Unit 14, Cameron Court	Winwick	LH	Good	1,136
Unit 2, Centre 21	Woolston	LH	Moderate	1,070
Units 22/23 Grosvenor Grange	Woolston	LH	Moderate	1,032
Unit 4, Eagle Park, Hawleys Lane	Winwick	LH	Good	1,020
Unit 19 Gemini Business Park	Westbrook	LH	Good	845
Units 12-15, Cranford Court, Hardwick Grange	Woolston	FH	Good	836
Unit 3, Melford Court, Hardwick Grange	Woolston	LH	Moderate	793
Unit 30, Melford Court, Hardwick Grange	Woolston	LH	Good	740
Unit 8b, Slutchers Lane	Town Centre	LH/FH	Moderate	721
Unit 1, Centre 21 Bridge Lane	Woolston	LH	Moderate	713

INDUSTRIAL				
Property	Area	Tenure	Quality	Size, Sqm
Unit 11, Taurus Park	Westbrook	LH	Good	712
Unit 18, Adlington Court	Birchwood	LH/FH	Good	697
Unit 19, Adlington Court	Birchwood	LH/FH	Good	697
Unit 20 Gemini Business Park	Westbrook	LH	Good	694
208A Cavendish Place	Birchwood	LH	Good	637
Unit 3.3, Third Floor, Evans House	Town Centre	LH	Poor	626
Unit 23/24, Melford Court, Hardwick Grange	Woolston	LH	Good	597
Unit 252, Europa Trade Park	Westbrook	LH	Good	591
Unit 1, Winstanley Industrial Estate	Orford	LH	Poor	553
Unit 14, Colville Court	Winwick	LH	Good	515
Unit 8, Colville Court	Winwick	LH	Good	505
Unit 9, Grosvenor Grange	Woolston	LH	Moderate	505
Unit 21, Grosvenor Grange, Kingsland Grange	Woolston	LH	Moderate	500
Unit 245, Europa Trade Park	Westbrook	LH	Good	499
Unit 232, Europa Trade Park	Westbrook	LH	Good	495
Unit 7, Taurus Park, Europa Boulevard	Winwick	LH	Moderate	467
Unit 35, Burtonwood Industrial Estate	Burtonwood	LH/FH	Moderate	452
Unit 38 Gateway 49 Trade Park	Winwick	LH	Good	437
Unit 33, Burtonwood Industrial Estate	Burtonwood	LH/FH	Moderate	434
Unit 8, Ravenhurst Court	Birchwood	LH	Moderate	423
Unit 2, The Wharf Industrial Estate	Town Centre	LH	Moderate	423
Unit 1C, Causeway Park, Central Road	Wilderspool	LH	Good	418
Unit 1, Winwick Point	Winwick	LH	Good	409
Unit 2, Winwick Point	Winwick	LH	Good	393
Unit 9, Easter Court, Gemini Business Park	Westbrook	LH	Good	386
Unit 4, Bowood Court	Winwick	LH	Good	380
Unit 22, Chetham Court	Winwick	LH	Good	372
Unit 255, Europa Trade Park	Westbrook	LH	Good	350
Unit 242, Europa Trade Park	Westbrook	LH	Good	347
Unit 254, Europa Trade Park	Westbrook	LH	Good	345
14/14a Catherine Street, Bewsey Industrial Estate	Bewsey	LH	Moderate	342
Unit 11, Grosvenor Grange	Woolston	LH	Moderate	324
Unit 22, Cameron Court	Winwick	LH	Good	320

INDUSTRIAL				
Property	Area	Tenure	Quality	Size, Sqm
Unit 10, Easter Court, Gemini Business Park	Westbrook	LH	Good	317
Unit 2, Tanning Court	Town Centre	LH	Moderate	316
Unit 1, Tanning Court	Town Centre	LH	Moderate	314
Unit 23, Cameron Court	Winwick	LH	Good	312
Unit 7B, Melford Court, Hardwick Grange	Woolston	LH	Poor	310
Unit 241, Europa Trade Park	Westbrook	LH	Good	293
Unit 18, Melford Court, Hardwick Grange	Woolston	LH	Good	274
28 Tatton Court, Kingsland Grange,	Woolston	LH/FH	Good	232
Unit 4 Gatewath Industrial Estate	Great Sankey	LH	Moderate	221
Unit 8 Gatewath Industrial Estate	Great Sankey	LH	Moderate	221
Unit 3, Tanning Court	Town Centre	LH	Moderate	212
Unit 8, Sankey Bridges Industrial Estate	Great Sankey	LH	Poor	211
B4 Trident Business Park	Birchwood	LH	Good	205
Unit 7, Howley Quay Industrial Estate	Town Centre	LH	Moderate	199
Unit 2.2, Second Floor, Evans House	Town Centre	LH	Poor	193
14 Greenwood Court, Taylor Business Park	Risley	LH	Good	186
26B Kingsland Grange,	Woolston	LH	Moderate	182
Unit 2, Trinity Court, Risley Industrial Estate	Birchwood	LH	Moderate	181
Units 12/14, Aston Court	Woolston	LH	Moderate	176
Units 15/16, Aston Court	Woolston	LH	Moderate	176
Unit 7, Hawthorne Business Park	Bewsey	LH	Moderate	160
Unit 6, Craven Court	Winwick	LH	Moderate	158
Unit 10, Craven Court	Winwick	LH	Moderate	158
Unit 12, Craven Court	Winwick	LH	Moderate	158
Unit 16, Craven Court	Winwick	LH	Moderate	158
Unit 12, Birch Court	Woolston	LH	Good	155
Unit 12, Hawthorne Business Park	Bewsey	LH	Moderate	153
Unit 14, Willow Court	Winwick	LH	Good	151
Unit 18, Willow Court	Winwick	LH	Good	151
Unit 7, Clarendon Court	Winwick	LH	Good	150
Unit 8, Clarendon Court	Winwick	LH	Good	150
Unit 18 Tanning Court	Town Centre	LH	Moderate	148
Unit 16, Greys Court	Woolston	LH	Moderate	146

INDUSTRIAL				
Property	Area	Tenure	Quality	Size, Sqm
Unit 4, Hawthorne Business Park	Bewsey	LH	Moderate	141
Palatine Industrial Estate	Wilderspool	LH	Budget	124
Unit 9, Clarendon Court	Winwick	LH	Good	116
Unit 30, Craven Court	Winwick	LH	Moderate	107
Unit 5, Hawthorne Business Park	Bewsey	LH	Moderate	106
Unit 6, Hawthorne Business Park	Bewsey	LH	Moderate	106
Unit 15, Willow Court	Winwick	LH	Good	100
Unit 4, Prestwood Court, Leacroft Road	Birchwood	LH	Moderate	97
Unit 7, Prestwood Court, Leacroft Road	Birchwood	LH	Moderate	97
Units 25, Aston Court	Woolston	LH	Moderate	89
Unit 5, Aston Court	Woolston	LH	Moderate	88
Unit 3, Greys Court	Woolston	LH	Moderate	88
Unit 15, Prestwood Court, Leacroft Road	Birchwood	LH	Moderate	84
Unit 9, Hawthorne Business Park	Bewsey	LH	Moderate	76
Unit 17, Prestwood Court, Leacroft Road	Birchwood	LH	Moderate	75
Unit 4, Greys Court	Woolston	LH	Moderate	72
Unit 2.2A, Second Floor, Evans House	Town Centre	LH	Poor	65
Unit 2.3, Second Floor, Evans House	Town Centre	LH	Poor	65
Unit 5, Craven Court	Winwick	LH	Moderate	51
Unit 11, Craven Court	Winwick	LH	Moderate	51
Unit 17, Craven Court	Winwick	LH	Moderate	51
Unit 19, Craven Court	Winwick	LH	Moderate	51
Unit 25, Craven Court	Winwick	LH	Moderate	51
Unit 25, Prestwood Court, Leacroft Road	Birchwood	LH	Moderate	48
K3, Taylor Business Park	Risley	LH	Good	35
Unit 2.6, Second Floor, Evans House	Town Centre	LH	Poor	27
Unit HL.1, First Floor, Evans House	Town Centre	LH	Poor	25

Source: BE Group, 2016

Table A2.2 – Schedule of Office Premises

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Stanford House, Garrett Field	Birchwood	LH	Good	5,090
Ground Floor, Washington House	Birchwood	LH	Good	2,474
First Floor, Faraday 401, Birchwood Park	Birchwood	LH	Good	1,820
21 & 23 Bridge Road	Woolston	FH	Good	1,091
Ground Floor, Building 1, Daten Park	Birchwood	LH	Good	1,026
First Floor, Building 1, Daten Park	Birchwood	LH	Good	1,026
4F East Wing, Chadwick House, Birchwood Park	Birchwood	LH	Moderate	990
Ground Floor, Lingley House, Birchwood Boulevard	Birchwood	LH	Good	964
330 Firecrest Court, Centre Park	Town Centre	LH	Moderate	957
Unit 4, Webster Court	Westbrook	LH/FH	Moderate	935
210 Cygnet Court, Centre Park	Town Centre	LH	Moderate	929
Brewhouse, Wilderspool Park	Wilderspool	LH	Good	873
First Floor, Europa House, Gemini Business Park	Westbrook	LH	Moderate	864
103 Dalton Avenue, Birchwood Park	Birchwood	LH	Good	797
4 Ibis Court, Centre Park	Town Centre	LH/FH	Moderate	770
910 Birchwood Boulevard	Birchwood	LH	Good	743
Second Floor, Mersey Bank House, Barbauld Street	Town Centre	LH	Good	722
Ground Floor, Exchange House, Daten Park	Birchwood	LH	Moderate	710
First Floor, Exchange House, Daten Park	Birchwood	LH	Moderate	710
Unit 6, 1 Olympic Way, Olympic Park	Birchwood	FH	Good	668
Unit 8, 1 Olympic Way, Olympic Park	Birchwood	FH	Good	666
East Wing, Second Floor, Rutherford House	Birchwood	LH	Good	630
Ground Floor, Atlantic House, Birchwood Point	Birchwood	LH	Good	623
First Floor, Atlantic House, Birchwood Point	Birchwood	LH	Good	623
Second Floor, Atlantic House, Birchwood Point	Birchwood	LH	Good	623
Second Floor, Kings Court, Scotland Road	Town Centre	LH	Moderate	602
First Floor, Kings Court, Scotland Road	Town Centre	LH	Moderate	592
3 Cygnet Court, Centre Park	Town Centre	LH/FH	Moderate	589
Unit 9, 1 Olympic Way, Olympic Park	Birchwood	FH	Good	576
2 Ibis Court, Centre Park	Town Centre	LH/FH	Moderate	565
First Floor, Building 3, Cinnamon Park, Crab Lane	Birchwood	LH	Moderate	562
Penthouse, Third Floor, Phoenix House, Centre Park	Wilderspool	LH	Good	553

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
First Floor, Suite 95, Spencer House, Dewhurst Road	Birchwood	LH	Moderate	540
Second Floor, Europa House, Gemini Business Park	Westbrook	LH	Moderate	529
First Floor, Kings Court, Scotland Road	Town Centre	LH	Moderate	523
6 Cygnet Court, Lakeside Drive, Centre Park	Town Centre	FH	Good	522
Main Building, Second Floor, Tannery Court	Town Centre	LH	Good	519
Third Floor, Quayside, Wilderspool Business Park	Wilderspool	LH	Good	511
Suite 95, Spencer House, Dewhurst Road	Birchwood	LH	Moderate	493
First Floor, Europa Point, Europa Boulevard	Westbrook	LH	Good	480
Ground Floor, Europa Point, Europa Boulevard	Westbrook	LH	Good	480
First Floor, 9 Mandarin Point, Centre Park	Town Centre	LH	Good	480
Ground Floor, 9 Mandarin Point, Centre Park	Town Centre	LH	Good	480
First Floor, Building 2, Cinnamon Park, Crab Lane	Birchwood	LH	Moderate	459
Second Floor, Building 2, Cinnamon Park, Crab Lane	Birchwood	LH	Moderate	459
Ground Floor, The Beacons	Birchwood	LH	Good	455
First Floor, Haden House, 63 Mersey Street	Town Centre	LH/FH	Good	455
4F SE Wing, Chadwick House, Birchwood Park	Birchwood	LH	Moderate	453
Quayside, Wilderspool Park	Wilderspool	LH	Good	427
Ground Floor, Haden House, 63 Mersey Street	Town Centre	LH/FH	Good	425
Ground Floor, Building 2, Cinnamon Park, Crab Lane	Birchwood	LH	Moderate	422
First Floor, Quayside, Wilderspool Business Park	Wilderspool	LH	Good	418
Malt Building, Wilderspool Park	Wilderspool	LH	Good	418
Second Floor, Quayside, Wilderspool Business Park	Wilderspool	LH	Good	418
First Floor, The Beacons	Birchwood	LH	Good	417
Ground Floor, Building 3, Daten Park	Birchwood	LH	Good	398
First Floor, Building 3, Daten Park	Birchwood	LH	Good	398
Unit 5a, 1 Olympic Way, Olympic Park	Birchwood	FH	Good	390
Ground Floor, The Point, Birchwood Boulevard	Birchwood	LH	Good	385
Unit 2, Forrest Way, Gatewarth Industrial Estate	Great Sankey	LH	Moderate	341
Ground Floor, Fontwell House, Trident Business Park	Birchwood	LH/FH	Good	333
First Floor, Fontwell House, Trident Business Park	Birchwood	LH/FH	Good	333
520 Birchwood Boulevard	Birchwood	LH	Good	330
Ground Floor, Suite 15, St James' Business Centre	Town Centre	LH	Good	326
Ground Floor, 1 Quay Business Centre	Winwick	LH	Moderate	325
Unit 2, First Floor, Cronton Cottages	Penketh	LH	Good	317

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
First Floor, Suite 20, St James' Business Centre	Town Centre	LH	Good	317
Unit D, Second Floor, Ribban Court, Dallam Lane	Town Centre	LH	Good	310
First Floor, 1 Quay Business Centre	Winwick	LH	Moderate	302
5 Bold Street	Town Centre	LH/FH	Good	298
114 Newton House, Birchwood Park	Birchwood	LH	Moderate	295
First Floor, Units 114-116, Genesis Centre	Birchwood	LH	Moderate	282
First Floor, 720 Mandarin Court	Town Centre	LH	Good	281
Ground Floor, EQE House, The Beacons	Birchwood	LH	Good	278
First Floor, Building 250, Cygnet Court, Centre Park	Town Centre	LH/FH	Good	278
Second Floor, Suite 24, St James' Business Centre	Town Centre	LH	Good	274
Ground Floor, 720 Mandarin Court	Town Centre	LH	Good	271
Warrington Business Centre, 65 Bewsey Street	Town Centre	FH	Good	270
Ground Floor, 830 Mandarin Court, Centre Park	Town Centre	LH/FH	Moderate	269
First Floor, 830 Mandarin Court, Centre Park	Town Centre	LH/FH	Moderate	269
824-825 Birchwood Boulevard	Birchwood	LH	Good	260
First Floor, Sedgefield House, Trident Business Park	Birchwood	LH/FH	Moderate	257
Suite E, Chadwick House, Birchwood Park	Birchwood	LH	Moderate	256
First Floor, Bank House, Bank Street	Town Centre	LH	Good	255
Second Floor, Empire Court, 30 Museum Street	Town Centre	LH	Good	253
Ground Floor, Quayside, Wilderspool Business Park	Wilderspool	LH	Good	248
2 Quay Business Centre	Winwick	LH	Moderate	248
14 Quay Business Centre	Winwick	LH	Moderate	244
Suite D, Chadwick House, Birchwood Park	Birchwood	LH	Moderate	238
Second Floor, Priory House	Town Centre	LH	Good	235
Building 2, Priory Court, Buttermarket Street	Town Centre	LH	Good	234
Building 3, Priory Court, Buttermarket Street	Town Centre	LH	Good	234
First Floor, Studio One, Rylands Street	Town Centre	LH	Good	200
First Floor, 790 Mandarin Court, Centre Park	Town Centre	LH/FH	Good	189
Ground Floor, 790 Mandarin Court, Centre Park	Town Centre	LH/FH	Good	188
Fourth Floor, Suite 2, Bank Quay House	Town Centre	LH	Moderate	186
Ground Floor, Units 21-22, Genesis Centre	Birchwood	LH	Moderate	172
Second Floor, 82-86 Bridge Street	Town Centre	LH	Good	167
First Floor, Ascot House, Trident Business Park,	Birchwood	LH	Good	156
Suite G03, The Base, Dallam Lane	Town Centre	LH	Good	140

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Suite 104, The Base, Dallam Lane	Town Centre	LH	Good	140
Suite 204, The Base, Dallam Lane	Town Centre	LH	Good	140
Suite 304, The Base, Dallam Lane	Town Centre	LH	Good	140
Second Floor, 82 Buttermarket Street	Town Centre	LH	Good	139
Terraces, First Floor, Tannery Court, Tanners Lane	Town Centre	LH	Good	139
First Floor, 780 Mandarin Court, Centre Park	Town Centre	LH/FH	Good	139
Ground Floor, 780 Mandarin Court, Centre Park	Town Centre	LH/FH	Good	139
Lower Ground Floor, Unit 3, Stockport Road	Thelwall	LH	Moderate	139
15 Quay Business Centre	Winwick	LH	Moderate	137
First Floor, 82 Buttermarket Street	Town Centre	LH	Good	134
113 Bridge Street	Town Centre	LH	Good	133
845 Birchwood Boulevard	Birchwood	LH	Good	130
864 Birchwood Boulevard	Birchwood	LH	Good	130
865 Birchwood Boulevard	Birchwood	LH	Good	130
First Floor, Suite 14a, St James' Business Centre	Town Centre	LH	Good	130
First Floor, Suite 10b-10c, St James' Business Centre	Town Centre	LH	Good	128
405 Faraday 401, Birchwood Park	Birchwood	LH	Good	128
First Floor, 14 Liverpool Road	Great Sankey	LH	Good	128
Suite 2, First Floor, Mayne Coaches	Town Centre	LH	Good	123
First Floor, 80 Buttermarket Street	Town Centre	LH	Good	122
First Floor Suite A, Priory House	Town Centre	LH	Good	119
First Floor, 10 Webster Court, Carina Park	Westbrook	LH	Good	118
Former Heliport Site, Barleycastle Trading Estate	Appleton	LH	Moderate	116
Ground Floor, 80 Buttermarket Street	Town Centre	LH	Good	114
Ground Floor, 82 Buttermarket Street	Town Centre	LH	Good	113
1200 Whitehouse, Wilderspool Business Park	Wilderspool	LH	Good	111
Part Ground Floor, Faraday 401, Birchwood Park	Birchwood	LH	Good	110
Fourth Floor, Suite 1 Bank Quay House	Town Centre	LH	Moderate	108
4b, Bold Street	Town Centre	LH/FH	Good	106
Second Floor, Suite 2, Bank Quay House	Town Centre	LH	Moderate	106
First Floor, Suite 10-10a, St James' Business Centre	Town Centre	LH	Good	104
Suite A, Empire Court, 30 Museum Street	Town Centre	LH	Good	104
Suite 404, The Base, Dallam Lane	Town Centre	LH	Good	104
Ground Floor East, Faraday 401, Birchwood Park	Birchwood	LH	Good	99

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
516 Chadwick House, Birchwood Park	Birchwood	LH	Good	98
Suite 17, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	96
First Floor, 13a Museum Street	Town Centre	LH	Good	95
Station House, Moss Side Lane	Woolston	FH	Moderate	92
Ground Floor, 10 Webster Court, Carina Park	Westbrook	LH	Good	92
Second Floor, 1 Priory Court, Buttermarket Street	Town Centre	LH	Good	92
Suite 103, The Base, Dallam Lane	Town Centre	LH	Good	87
Suite 203, The Base, Dallam Lane	Town Centre	LH	Good	87
Suite 303, The Base, Dallam Lane	Town Centre	LH	Good	87
Suite G01, The Base, Dallam Lane	Town Centre	LH	Good	82
508 Chadwick House, Birchwood Park	Birchwood	LH	Good	81
403 Faraday 401, Birchwood Park	Birchwood	LH	Good	80
Suite 9, Beech House, Padgate Business Park	Padgate	LH	Moderate	80
First Floor, 1 Priory Court, Buttermarket Street	Town Centre	LH	Good	80
631 Birchwood Boulevard	Birchwood	LH	Good	79
820 Birchwood Boulevard	Birchwood	LH	Good	79
823 Birchwood Boulevard	Birchwood	LH	Good	79
843 Birchwood Boulevard	Birchwood	LH	Good	79
First Floor, 457 Warrington Road,	Culcheth	LH	Good	79
Suite 18, Rowan House, Padgate Business Park	Padgate	LH	Moderate	78
Ground Floor, Suite 11a, St James' Business Centre	Town Centre	LH	Good	77
Suite 407, The Base, Dallam Lane	Town Centre	LH	Good	77
518 Chadwick House, Birchwood Park	Birchwood	LH	Good	76
510 Chadwick House, Birchwood Park	Birchwood	LH	Good	75
First Floor, Suite 4, St James' Business Centre	Town Centre	LH	Good	75
Suite 102, The Base, Dallam Lane	Town Centre	LH	Good	72
Suite 202, The Base, Dallam Lane	Town Centre	LH	Good	72
Suite 302, The Base, Dallam Lane	Town Centre	LH	Good	72
Suite 403, The Base, Dallam Lane	Town Centre	LH	Good	71
First Floor, Suite 15a, St James' Business Centre	Town Centre	LH	Good	69
Ground Floor, Unit 38-39, Genesis Centre	Birchwood	LH	Moderate	69
Suite 16, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	67
Ground Floor, Unit 3, Stockport Road	Thelwall	LH	Moderate	67
Office 115/16, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	65

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
700 Whitehouse, Wilderspool Business Park	Wilderspool	LH	Good	65
First Floor, Suite 5, St James' Business Centre	Town Centre	LH	Good	65
Ground Floor, 224 Wilderspool Causeway	Wilderspool	LH	Good	64
4F South Wing, Chadwick House, Birchwood Park	Birchwood	LH	Moderate	63
Office 15, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	57
Second Floor, 80 Buttermarket Street	Town Centre	LH	Good	57
Suite 12, Rowan House, Padgate Business Park	Padgate	LH	Moderate	57
Suite 4, Maple House, Padgate Business Park	Padgate	LH	Moderate	57
First Floor, 411 Warrington Road	Culcheth	LH	Good	56
Suite 13, Rowan House, Padgate Business Park	Padgate	LH	Moderate	56
First Floor, Bank Quay House, Sankey Street	Town Centre	LH	Moderate	56
First Floor, Suite 24, St James' Business Centre	Town Centre	LH	Good	56
Suite 207, The Base, Dallam Lane	Town Centre	LH	Good	56
Suite 208, The Base, Dallam Lane	Town Centre	LH	Good	56
Suite 307, The Base, Dallam Lane	Town Centre	LH	Good	56
Suite 308, The Base, Dallam Lane	Town Centre	LH	Good	56
Suite 105, The Base, Dallam Lane	Town Centre	LH	Good	54
Suite 205, The Base, Dallam Lane	Town Centre	LH	Good	54
Suite 305, The Base, Dallam Lane	Town Centre	LH	Good	54
Suite 108, The Base, Dallam Lane	Town Centre	LH	Good	53
Suite 210, The Base, Dallam Lane	Town Centre	LH	Good	53
Suite 310, The Base, Dallam Lane	Town Centre	LH	Good	53
Suite 1&2, Maple House, Padgate Business Park	Padgate	LH	Moderate	53
Ground Floor, 1 Priory Court, Buttermarket Street	Town Centre	LH	Good	52
509 Chadwick House, Birchwood Park	Birchwood	LH	Good	51
First Floor, 27 Rylands Street	Town Centre	LH	Good	49
Office 12, Second Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	49
Suite G05, The Base, Dallam Lane	Town Centre	LH	Good	49
Suite G06, The Base, Dallam Lane	Town Centre	LH	Good	49
Suite G07, The Base, Dallam Lane	Town Centre	LH	Good	48
404 Faraday 401, Birchwood Park	Birchwood	LH	Good	47
409 Chadwick House, Birchwood Park	Birchwood	LH	Good	47
506 Chadwick House, Birchwood Park	Birchwood	LH	Good	47
Ground Floor, 27 Rylands Street	Town Centre	LH	Good	47

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Office 123, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	46
402 Faraday 401, Birchwood Park	Birchwood	LH	Good	46
406 Faraday 401, Birchwood Park	Birchwood	LH	Good	46
517 Chadwick House, Birchwood Park	Birchwood	LH	Good	46
Suite, The Breeze, Kelvin Close	Birchwood	LH	Moderate	46
Suite 110, The Base, Dallam Lane	Town Centre	LH	Good	46
Suite 212, The Base, Dallam Lane	Town Centre	LH	Good	46
Suite 312, The Base, Dallam Lane	Town Centre	LH	Good	46
Suite 402, The Base, Dallam Lane	Town Centre	LH	Good	45
Suite 410, The Base, Dallam Lane	Town Centre	LH	Good	45
First Floor, Friars Court, Barbauld Street	Town Centre	LH	Good	45
Suite 112, The Base, Dallam Lane	Town Centre	LH	Good	44
Suite 214, The Base, Dallam Lane	Town Centre	LH	Good	44
Suite 314, The Base, Dallam Lane	Town Centre	LH	Good	44
Suite 2, Central House, Central Way, Winwick Street	Town Centre	LH	Moderate	41
Suite 412, The Base, Dallam Lane	Town Centre	LH	Good	41
First Floor, 224 Wilderspool Causeway	Wilderspool	LH	Good	40
Suite 15, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	40
423 Chadwick House, Birchwood Park	Birchwood	LH	Good	39
Suite 101, The Base, Dallam Lane	Town Centre	LH	Good	39
Suite 106, The Base, Dallam Lane	Town Centre	LH	Good	39
Suite 201, The Base, Dallam Lane	Town Centre	LH	Good	39
Suite 206, The Base, Dallam Lane	Town Centre	LH	Good	39
Suite 301, The Base, Dallam Lane	Town Centre	LH	Good	39
Suite 306, The Base, Dallam Lane	Town Centre	LH	Good	39
421 Chadwick House, Birchwood Park	Birchwood	LH	Good	38
Unit 1p, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	38
Office 110, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	37
Office 114, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	37
Suite, Carnoustie House, The Links, Kelvin Close	Birchwood	LH	Moderate	37
First Floor, 49 Museum Street	Town Centre	LH	Good	37
Office 1, Ground Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	37
Suite 14, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	37
Suite 406, The Base, Dallam Lane	Town Centre	LH	Good	37

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Suite 401, The Base, Dallam Lane	Town Centre	LH	Good	36
Ground Floor, 49 Museum Street	Town Centre	LH	Good	36
Unit 1n, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	35
Suite 405, The Base, Dallam Lane	Town Centre	LH	Good	35
Suite 411, The Base, Dallam Lane	Town Centre	LH	Good	35
Suite 109, The Base, Dallam Lane	Town Centre	LH	Good	34
Suite 211, The Base, Dallam Lane	Town Centre	LH	Good	34
Suite 311, The Base, Dallam Lane	Town Centre	LH	Good	34
Suite 409, The Base, Dallam Lane	Town Centre	LH	Good	34
Suite 13, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	33
Ground Floor, Fernden House, Chapel Lane	Stockton Heath	LH	Moderate	30
Suite 111, The Base, Dallam Lane	Town Centre	LH	Good	30
Suite 213, The Base, Dallam Lane	Town Centre	LH	Good	30
Suite 313, The Base, Dallam Lane	Town Centre	LH	Good	30
Office 15, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	28
Claremont House, Kelvin Close	Birchwood	LH	Good	28
300 Whitehouse, Wilderspool Business Park	Wilderspool	LH	Good	28
Suite, Claremont House, The Links, Kelvin Close	Birchwood	LH	Moderate	27
Suite 12, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	27
Room 5, 21 Common Lane	Culcheth	LH	Poor	25
Suite 11, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	24
Office 3, Ground Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	24
Office 6, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	22
Office 14, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	21
Suite 10, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	21
Ground Floor, St. Austins Chambers	Town Centre	LH	Poor	19
105 Newton House, Birchwood Park	Birchwood	LH	Good	18
Unit 1g, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	18
Unit 1l, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	18
200 Whitehouse, Wilderspool Business Park	Wilderspool	LH	Good	18
First Floor, Exec Suite 14, St James' Business Centre	Town Centre	LH	Good	18
Unit 1m, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	16
Office 105, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	16
Office 13, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	15

OFFICE				
Property	Settlement	Tenure	Quality	Size, Sqm
Office 7, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	15
First Floor, Exec Suite 15, St James' Business Centre	Town Centre	LH	Good	15
011 Newton House, Birchwood Park	Birchwood	LH	Good	14
Unit 1b, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	14
Office 11, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	14
First Floor, Exec Suite 10, St James' Business Centre	Town Centre	LH	Good	13
First Floor, Exec Suite 16, St James' Business Centre	Town Centre	LH	Good	13
Suite 8, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	13
Suite 9, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	13
Unit 1k, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	12
Unit 1c, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	12
First Floor, Exec Suite 4, St James' Business Centre	Town Centre	LH	Good	12
First Floor, Exec Suite 5, St James' Business Centre	Town Centre	LH	Good	12
First Floor, Exec Suite 8, St James' Business Centre	Town Centre	LH	Good	12
111 Newton House, Birchwood Park	Birchwood	LH	Good	11
Office 9, First Floor, 3-5 Wilson Patten Street	Town Centre	LH	Moderate	11
Suite 7, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	11
Unit 1h, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	10
Unit 1a, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	9
Unit 1d, Hawthorne Business Park, Hawthorne Street	Bewsey	LH	Moderate	9
100 Whitehouse, Wilderspool Business Park	Wilderspool	LH	Good	9
Suite 4, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	9
Suite 5, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	9
Suite 6, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	9
Office 8, Portal Business Centre, Dallam Court	Town Centre	LH	Moderate	9
59 Wilson Pattern Street	Town Centre	LH	Moderate	7
Suite 1, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	5
Suite 2, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	5
Suite 3, Cinnamon House, Cinnamon Park	Birchwood	LH	Moderate	5

Source: BE Group, 2016

Appendix 3

Employment Site Proformas

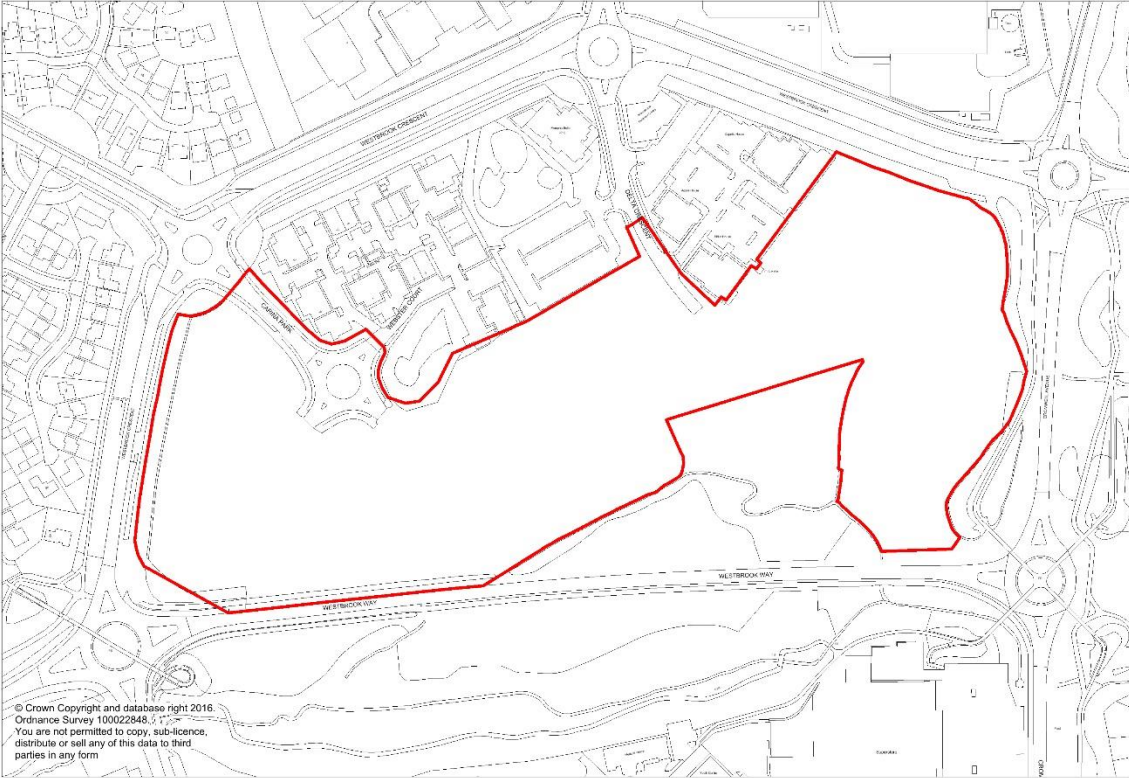
Appendix 3 – Employment Site Proformas

This appendix contains details of employment sites via a table of their details followed by a map showing the site outlined in red.

Local Employment Sites

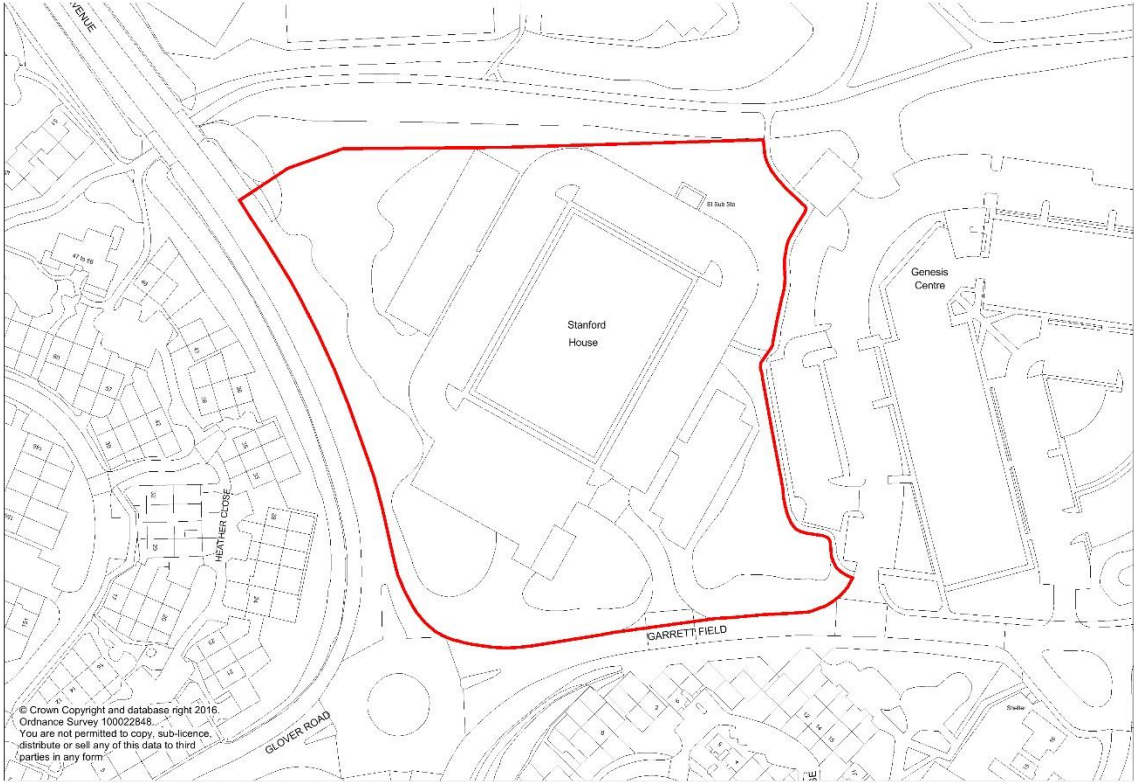
Site Ref: Name	36c: Gemini 16, Westbrook
Owner	Homes and Communities Agency, Quorum Estates
Agent(s)	Bloor Homes (housing developer)
Size, ha	7.60 (2.20, once land now consented for housing is excluded)
Market Availability	Not available
Planning	<p>Within existing Employment Area (Policy PV1) Consent for B1, B2, B8 uses under Section 6.1 / 7.1 of the New Towns Act</p> <p>2014/24762 – Reserved matters consent for 120 homes. Three further discharge of conditions consents.</p> <p>2013/22322 – Outline consent for the principle of residential development with associated access, parking and open greenspace</p>
Proposal	<p>Western portion of the land, 5.4 ha, is now a housing site. Some 2.2 ha in the east remains theoretically available for employment use</p>
Constraints	<p>Trees onsite Ponds onsite Streams cross the site Access to Westbrook Crescent, from eastern land, is now limited by housing development site Site has claw back conditions regarding any value derived</p>
Comments	<p>Landowners for the east of the site report difficulties in marketing the site for employment uses (offices), due to lack of market demand and access constraints onto Westbrook Crescent</p> <p>Owner now in pre-application discussions with the Council regarding a 1,672 sqm foodstore and associated A1 retail on the land with interest expressed from a foodstore operator.</p> <p>However, land remains a key part of the wider Gemini Employment Area and could support office uses on land now adjacent to housing.</p>
Likely Development Potential	B1(a) office
Serviced	No
Availability, years	6-10

Site: 36c: Gemini 16, Westbrook



Site Ref: Name	216: Stanford House (Land at), Garratt Field, Birchwood
Owner	Capital and Provincial
Agent(s)	Jones Lang LaSalle
Size, ha	2.25 This covers the entirety of the Stanford House curtilage, including the existing buildings and car parking. The new build property, 4,940 sqm over four storeys, would only require 0.32 ha at a development density of 3,900 sqm/ha.
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2010/15826 – Full consent for erection of 4 storey office building with 150 car parking spaces. 2013/21379 – Extension of time secured for three years to 10 th May 2016. Thus application has recently lapsed.
Proposal	Proposed for a 4,940 sqm office property on the site of existing car parking for Stanford House, incorporating new decked and surface car parking to replace that which would be lost. Access, independent of Stanford House would be provided onto Birchwood Park Avenue. Proposed as a standalone headquarters style building, not linked to Talk Talk
Constraints	Land in active use as parking for Stanford House Some trees on site
Comments	Site currently provides some 91 car parking spaces for Stanford House Talk Talk hold a 15-year lease on the site and are currently looking to sub-let Stanford House Agents report the site was purchased as an investment for the rental income of Stanford House, not for further development. Thus proposed scheme, consent for which has now lapsed, is judged unlikely to ever come forward.
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Assumed will not come forward at any time.

Site 216: Stanford House, Garratt Field, Birchwood



Site Ref: Name	309: Forrest Way Business Park, Forrest Way
Owner	United Utilities
Agent(s)	CBRE/Littler and Associates
Size, ha	7.50
Market Availability	Not available Previously marketed, for sale, as nine development plots of 0.4-2.0 ha, with options to combine plots a make a single development site of up to 7.30 ha. Has now been taken off the market
Planning	Within existing Employment Area (Policy PV1) Within Strategic Green Link area (Policy CS6) 'Active Travel Greenway Route' (Policy MP3) passes through the site 2007/11662 and 2010/17309 – Full consent for land raising, and outline consent for a mixed supply of employment floorspace totalling 22,324 sqm 2013/21921 – Extension of time secured: <ul style="list-style-type: none"> • Application(s) for approval of any reserved matters shall be made not later than of 7 years from 1st July 2013 • The development shall commence not later than whichever is the later of the following dates: <ul style="list-style-type: none"> ○ 9 years from the date of the grant of this permission ○ 2 years from the final approval of the last reserved matter ○ By 23rd December 2017.
Proposal	Proposed for a mixed business park comprising: <ul style="list-style-type: none"> • 3,230 sqm B1(a) office • 6,937 sqm B1(c) light industrial • 2,680 sqm B2 general industrial • 9,477 sqm B8 warehouse. Previously agreed that the size of individual units would not exceed 4,645 sqm each. Land to the south west is proposed for ecological mitigation.
Constraints	In food risk area – Flood Zone 3 (some existing flood defence bunding onsite) A pipeline, subject to HSE PADHI exclusion zone, runs across the site. Land affected is proposed for ecological mitigation. Main sewer routes run across the site, restricting development in some locations Pylons cross the site Public right of way bounds the site (Trans-Pennine Trail) Trees onsite Site uneven in places Wildlife Corridors cross the site Some site contamination
Comments	Owner has taken the Business Park off the market, with no sales completed. The current plan is to await completion of the new cross-Mersey link road, which will run adjacent to the site. After that the Business Park will be better accessed and more likely to attract market interest. The road is expected to commence from 2018.
Likely Development Potential	Assumed any scheme will be primarily industrial and warehouse based – 50 percent B1(c)/B2 industrial and 50 percent B8 - 3.75 ha each
Serviced	No
Availability, years	6-10

Site 309: Forrest Way Business Park, Forrest Way



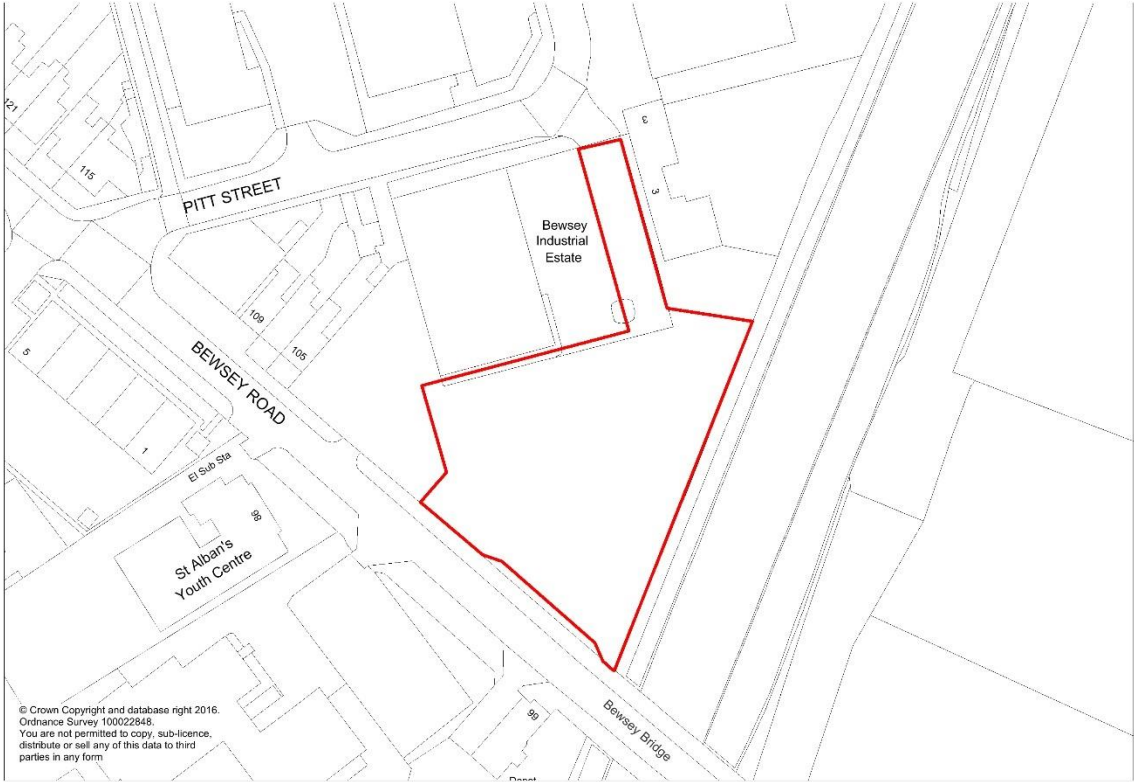
Site Ref: Name	324: Land at Cameron Court/Colville Court/Chetham Court, Winwick Quay
Owner	LaSalle Investment Management
Agent(s)	Riddell TPS
Size, ha	9.42 – Although this size covers the whole Winwick Quay area, including developed property. Land for new build units only equates to 1.6 ha at 3,900 sqm/ha.
Market Availability	Land not available – Individual units may be marketed.
Planning	Within existing Employment Area (Policy PV1) 2008/14053 – Full consent for the erection of new employment units, along with the reconfiguration of existing units at Cameron, Colville and Chetham Courts. 2013/21379 – Extension of time secured for three years to 11 th February 2016. Thus application has now lapsed.
Proposal	Proposal is for: <ul style="list-style-type: none"> • The erection of seven new units (units 1a, 5a, 6a, 14a, 17a, 19a and 24a) (use classes B1, B2 and B8) at Cameron Court – 6,160 sqm of new floorspace. • Reconfiguration of units 9-11 and 17-19 and external alterations to existing elevations at Cameron Court • Erection of two new units (units 6a, 7a) (use classes B1, B2 and B8) and reconfiguration of units 3-9 and external alterations to existing elevations at Colville Court • Reconfiguration of units 1-9 and 22-25 and external alterations to existing elevations at Chetham Court • Redevelopment at Chetham Court • Associated car parking and construction of link road between the A49 (Mill Lane) and Calver Road. <p>Overall 6,377 sqm of new space in 9 units.</p>
Constraints	-
Comments	Agents report that Winwick Quay was purchased by current owners in 2015 as an investment only. New development will not be progressed here.
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Assumed will not come forward at any time (at least in terms of new build development).

Site 324: Land at Cameron Court/Colville Court/Chetham Court, Winwick Quay



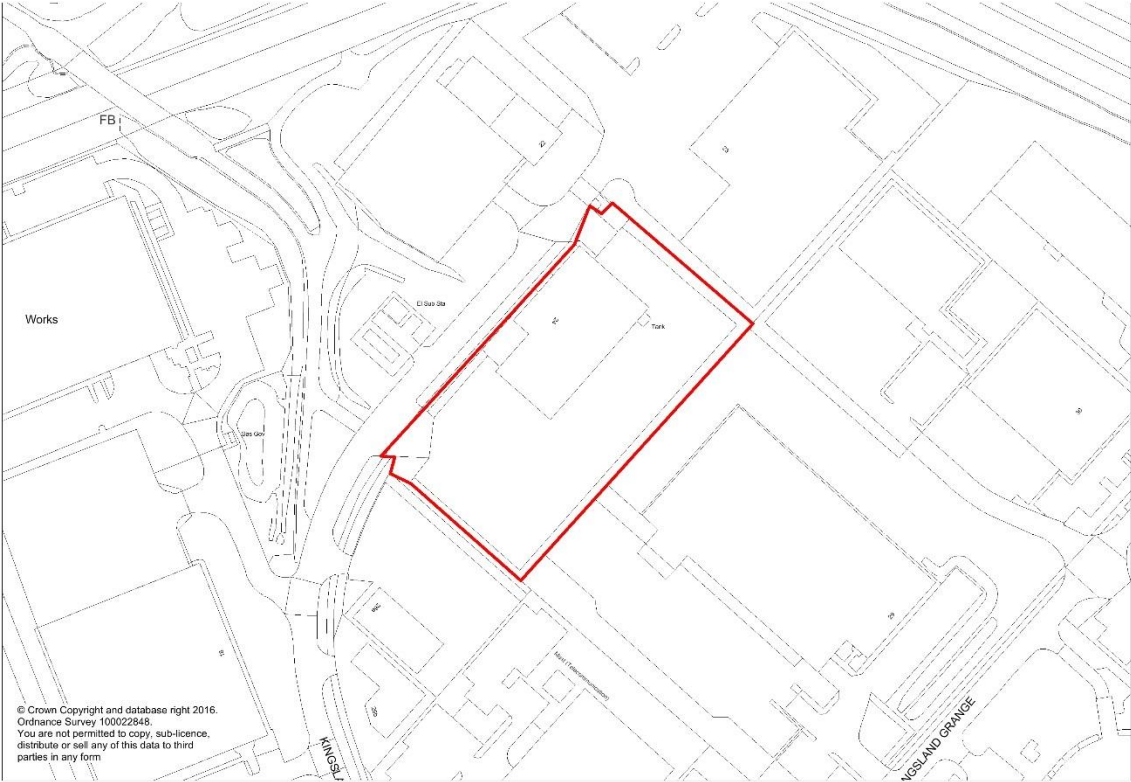
Site Ref: Name	336: Land off Bewsey Road
Owner	Asinile Ltd
Agent(s)	Aarck Design
Size, ha	0.28 Reduced to 0.15 ha if land for A1 retail use is excluded
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2010/16550 – Full consent for four, mixed A1 retail and B1(c) light industrial units
Proposal	Proposed for: <ul style="list-style-type: none"> • A1 – 114 sqm • B1(c) – 580 sqm
Constraints	Flood risk area – Flood Zone 3.
Comments	Units under construction.
Likely Development Potential	B1(c) Industrial
Serviced	Yes
Availability, years	0-1

Site 336: Land off Bewsey Road



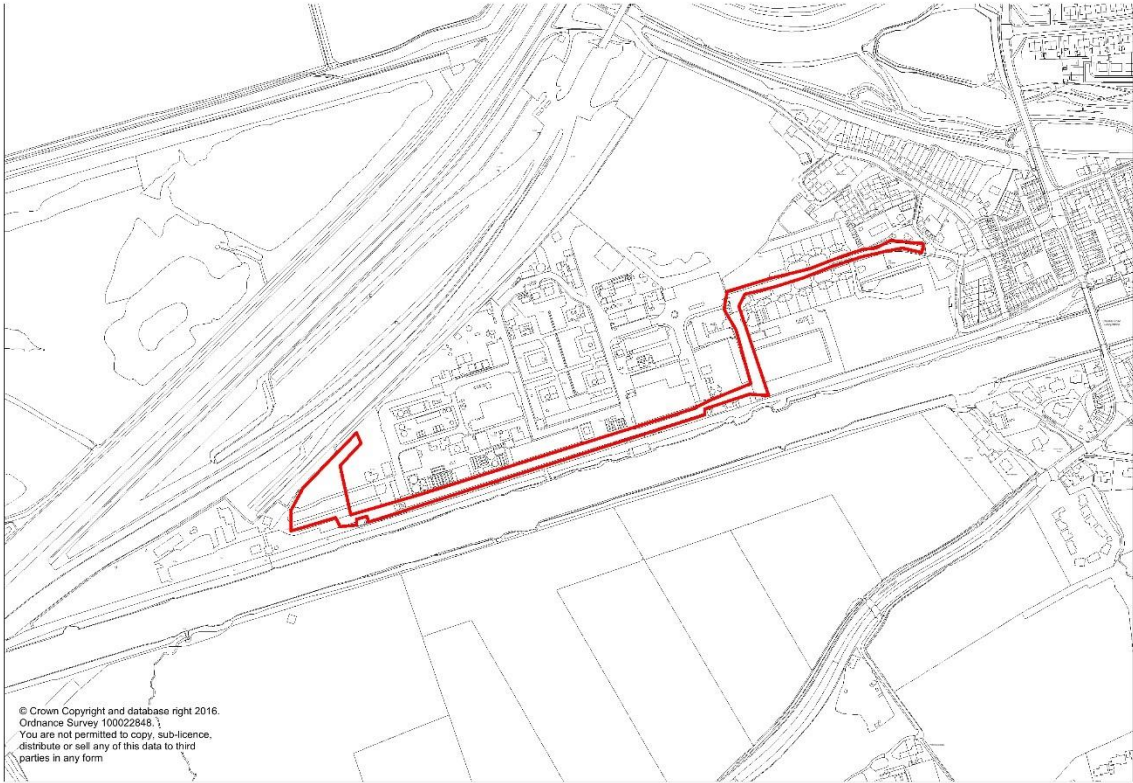
Site Ref: Name	353: 24 Kingsland Grange, Woolston
Owner	NM Utilities Limited
Agent(s)	NMBCE Limited
Size, ha	6.20 - Although this covers the whole of the NM Utilities site. Land for the new build office only equates to 0.07 ha at 3,900 sqm/ha.
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2012/20452 – Full consent for a new office building to the rear of existing premises. Consent appears to have lapsed in October 2015.
Proposal	Proposal is for a 262 sqm office building, on top of 1,559 sqm of additional space. New office would be a single story prefabricated structure.
Constraints	-
Comments	Site currently occupied by open storage, small scale storage units and hard standing. No evidence that applicant wishes to implement this scheme.
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Assume will not come forward

Site: 353: 24 Kingsland Grange, Woolston



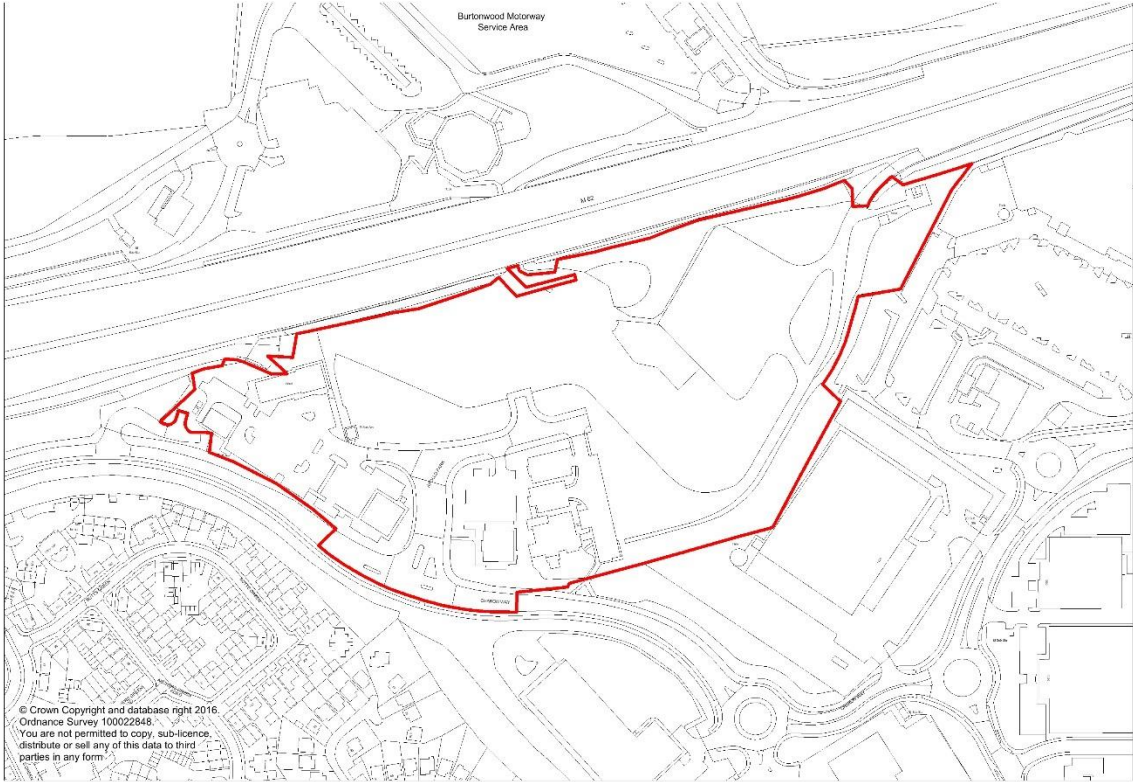
Site Ref: Name	355: Perstorp UK Ltd, Baronet Road, Latchford
Owner	Solvey Interox
Agent(s)	Ellis Williams Architects
Size, ha	1.51 Site area incorporates access roads through the chemicals complex. The proposed office building would only require 0.25 ha at 3,900 sqm/ha.
Market Availability	Not available
Planning	2012/20949 – Full consent for office building within curtilage of chemical plant, car parking and associated landscaping. Also a new internal access road across the Perstorp site. Consent appears to have lapsed in February 2016.
Proposal	Proposed for a 982 sqm single-storey office building with a mezzanine level.
Constraints	Flood risk area – Flood Zone 3 Foundations of cleared buildings, and several small structures onsite
Comments	For the sole use of Solvey/Perstorp UK, to accommodate plant engineers and business staff currently housed in Portacabins or otherwise distributed across the site. No evidence that applicant wishes to implement this scheme.
Likely Development Potential	N/A
Serviced	No
Availability, years	Assume will not come forward

Site 355: Perstop UK, Baronet Road, Latchford



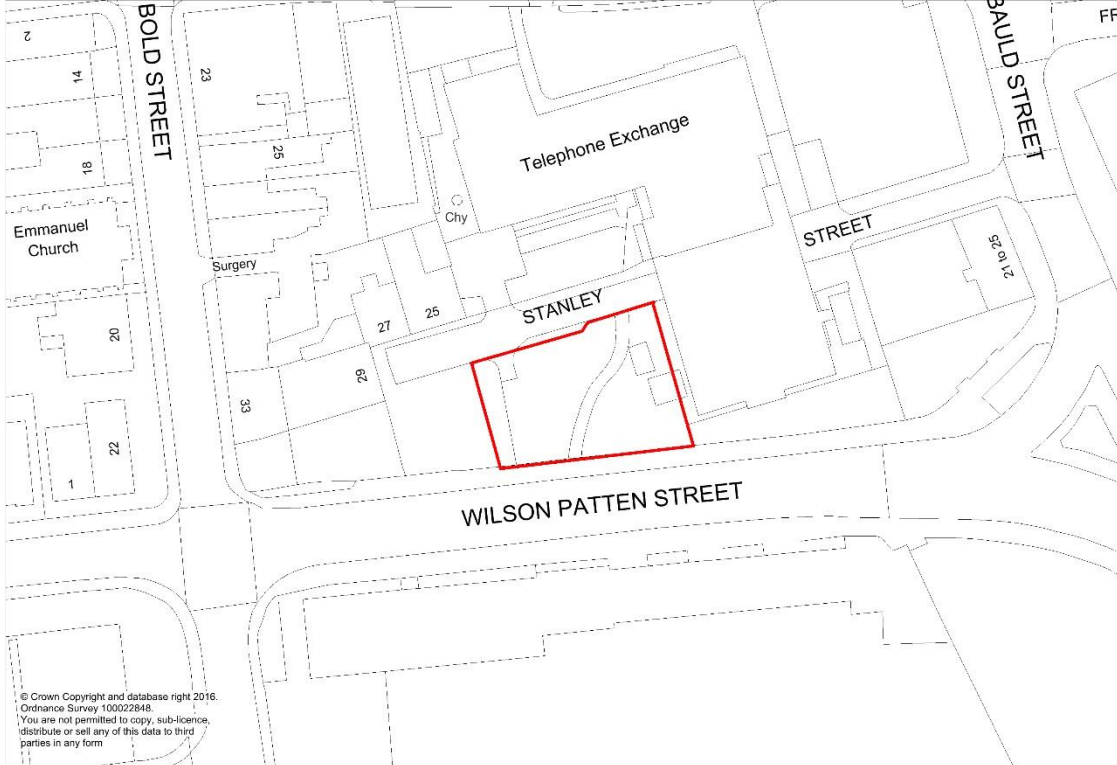
Site Ref: Name	356: Gemini 8 Retail Park, Charon Way, Westbrook
Owner	Marshall CDP
Agent(s)	Knight Frank, Davis Harrison
Size, ha	5.21
Market Availability	Marketed for design and build developments of 929-18,581 sqm on either a freehold or a leasehold basis.
Planning	Within existing Employment Area (Policy PV1) 2007/11923 – Outline consent for redevelopment for B1/B2 and B8 business uses together with Hotel (C1) and pub/restaurant (A3/A4). Provision of access and on-site infrastructure, provision of internal estate road, plateau formation, drainage and all associated works 2013/21417 – In May 2013, the period in which a Reserved Matters application can be submitted was extended by 5 years.
Proposal	Proposal comprises the following: <ul style="list-style-type: none"> • 0.77ha – pub/restaurant/hotel (3,100 sqm gross floor area) – developed as Starbucks ‘Drive To’, Travelodge, Subway, Harvester restaurant, Frankie and Benny’s and Marston’s pub/restaurant ‘The Skymaster’. • 2.03ha – B1(a) office (10,917 sqm gross floor area) • 3.18ha – B1(c)/B2/B8 industrial (12,450 sqm gross floor area)
Constraints	-
Comments	Now a cleared development site
Likely Development Potential	2.03ha – B1(a) office 3.18ha – B1(c)/B2/B8 industrial
Serviced	No
Availability, years	6-10

Site 356: Gemini 8 Retail Park, Charon Way, Westbrook



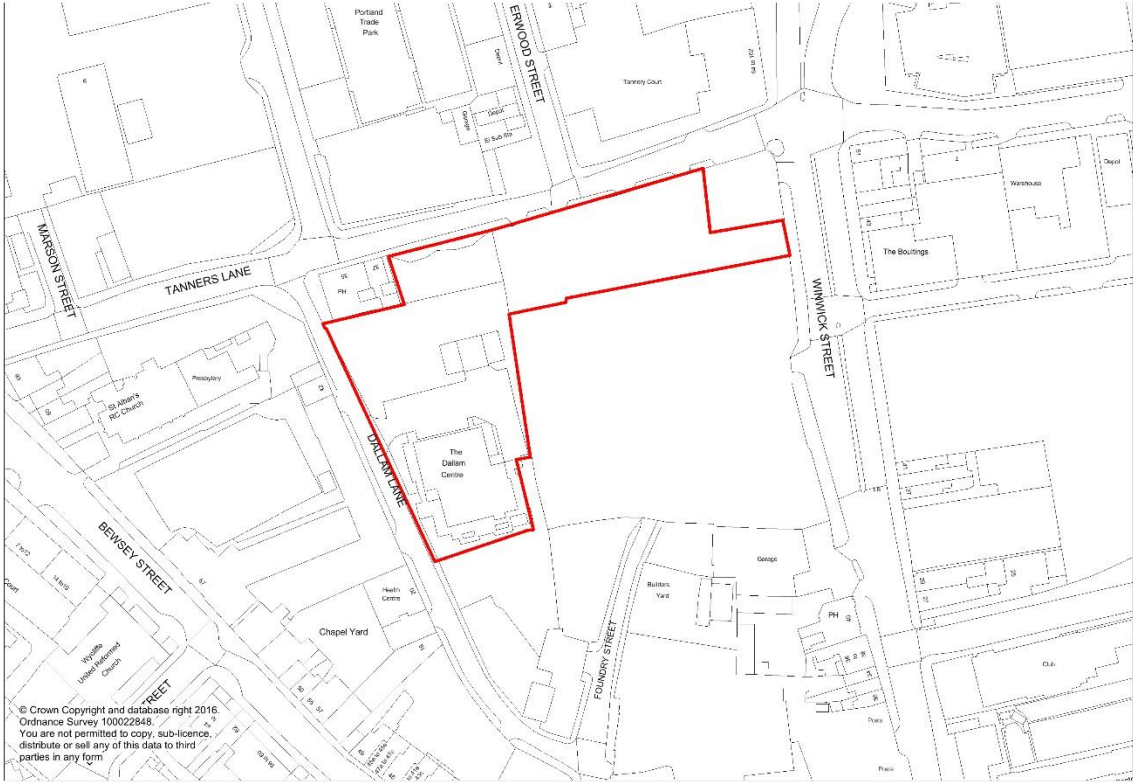
Site Ref: Name	360: Land at Stanley Street
Owner	Chesro
Agent(s)	Emery Planning Partnership
Size, ha	0.05
Market Availability	Site on the market with outline consent.
Planning	Town Centre site In Area of Archaeological Importance (Policy QE8) 2009/14268 and 2010/16063 – Outline consent for the construction of a 5-storey office block and associated car parking with matters of appearance and landscaping reserved for later approval 2013/22160 – Extension of time secured for three years to 8 th August 2016 (or two years from final reserved matters approval).
Proposal	Proposed for a 1,677 sqm, five-storey office building.
Constraints	Small tightly defined site overlooked by Telephone Exchange building Flood risk area – Flood Zone 3 Conservation Area adjacent
Comments	Land currently a small contract car park, operated by the owner.
Likely Development Potential	B1(a) office
Serviced	No
Availability, years	6-10

Site 360: Land at Stanley Street



Site Ref: Name	362: Former Dallam Day Centre, Dallam Lane
Owner	Warrington Borough Council
Agent(s)	Managed by Langtree
Size, ha	0.48
Market Availability	Land not available Incubator scheme is now marketed as 'The Base'. Offers office suites of 30-140 sqm, to let to advanced manufacturing and engineering businesses. Two tenants have been secured to date.
Planning	Town Centre site In Area of Archaeological Importance (Policy QE8) 2013/22881 – Full consent for a five storey office building with associated access, parking, landscaping and infrastructure
Proposal	Proposed as for business start-up 'incubator' units (Use Class B1(a) and (b)) totalling 4,645 sqm Scheme completed in January 2016 Land to the south also accommodates UTC Warrington a 14-19 Science and Engineering academy. This property is also under construction and nearing completion.
Constraints	-
Comments	Conservation Area adjacent
Likely Development Potential	B1(a) office
Serviced	Yes
Availability, years	All B-Class development completed onsite

Site: 362: Former Dallam Day Centre, Dallam Lane



Site Ref: Name	363: Novelis UK, Latchford Locks, Thelwall Lane
Owner	Novelis UK
Agent(s)	Framptons
Size, ha	0.30
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2013/22329 – Full consent for a new barn extension and erection of dust filter unit
Proposal	A further 3,012 sqm total gross internal floorspace proposed (Use Class B2) as an automotive scrap recycling facility, providing an additional line to the existing aluminium recycling processes that are undertaken at the Latchford Lock Works.
Constraints	Flood risk area – Flood Zone 3
Comments	Site currently in use for open storage
Likely Development Potential	B2 industrial
Serviced	Yes
Availability, years	1-5

Site 363: Novelis UK, Latchford Locks, Thelwall Lane



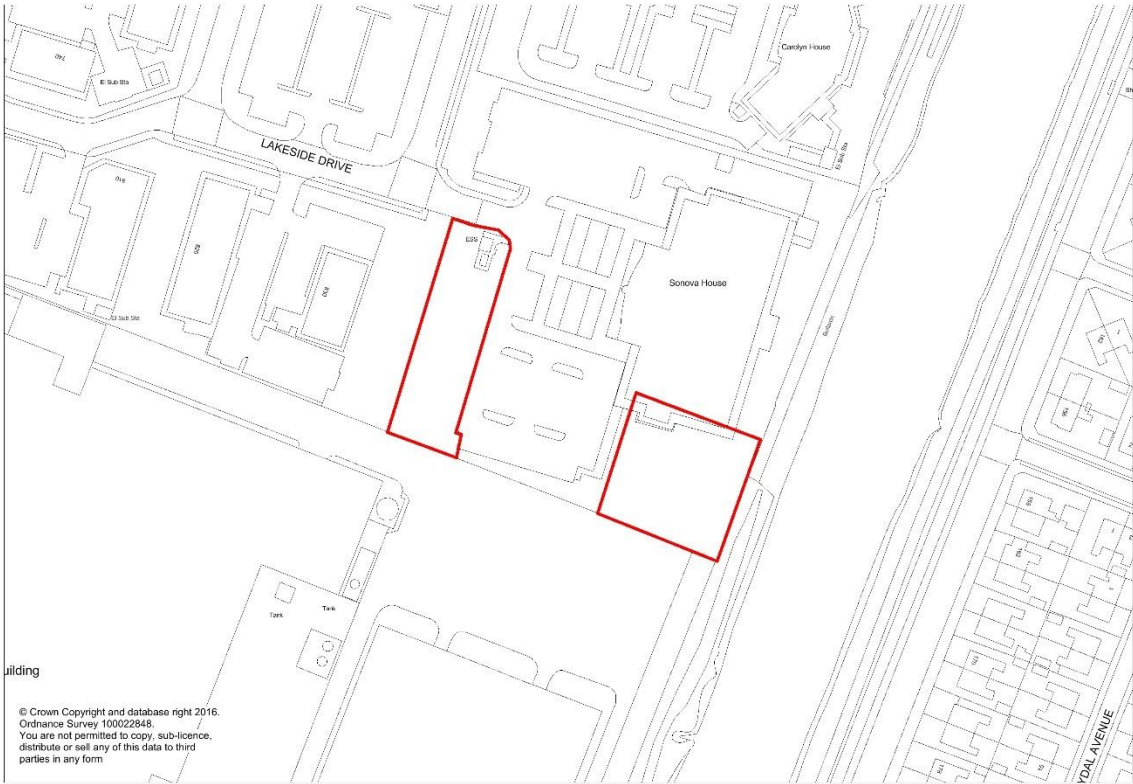
Site Ref:Name	365: Calver Park, Calver Park Road
Owner	Greater Manchester Property Venture Fund
Agent(s)	GVA
Size, ha	6.16 Reduces to 4.94 ha if land now proposed for a 1,722 sqm sui generis car showroom is excluded.
Market Availability	On the market for design and build options, for sale or to let
Planning	Within existing Employment Area (Policy PV1) 2013/22533 – Outline consent for an industrial development excluding access for vehicle and ancillary uses (sui generis), light industry (use class B1c), general industrial (B2), storage/distribution (B8), including ancillary office and trade counter (up to 20% floorspace for goods assembled or manufactured on the premises) and associated access, parking, fencing and landscaping.
Proposal	Proposed for 11 B1, B2, B8 units of 382-4923 sqm, totalling 14,899 sqm, plus a 1,722 sqm car showroom at the junction of Calver Road and Cromwell Road. Initial site preparation underway
Constraints	Pylons cross the site Main River line crosses eastern edge of site
Comments	Site agents report that the owner is now seeking to develop the whole site for a single sui generis car showroom of 3800 sqm, with associated car maintenance and parking facilities, for The Car People. This would be subject to any revisions on the current planning consents required. Completion of this scheme is expected by April 2017.
Likely Development Potential	N/A
Serviced	No (servicing underway)
Availability, years	Assume site now lost to sui generis car showroom use.

Site 365: Calver Park, Calver Park Road



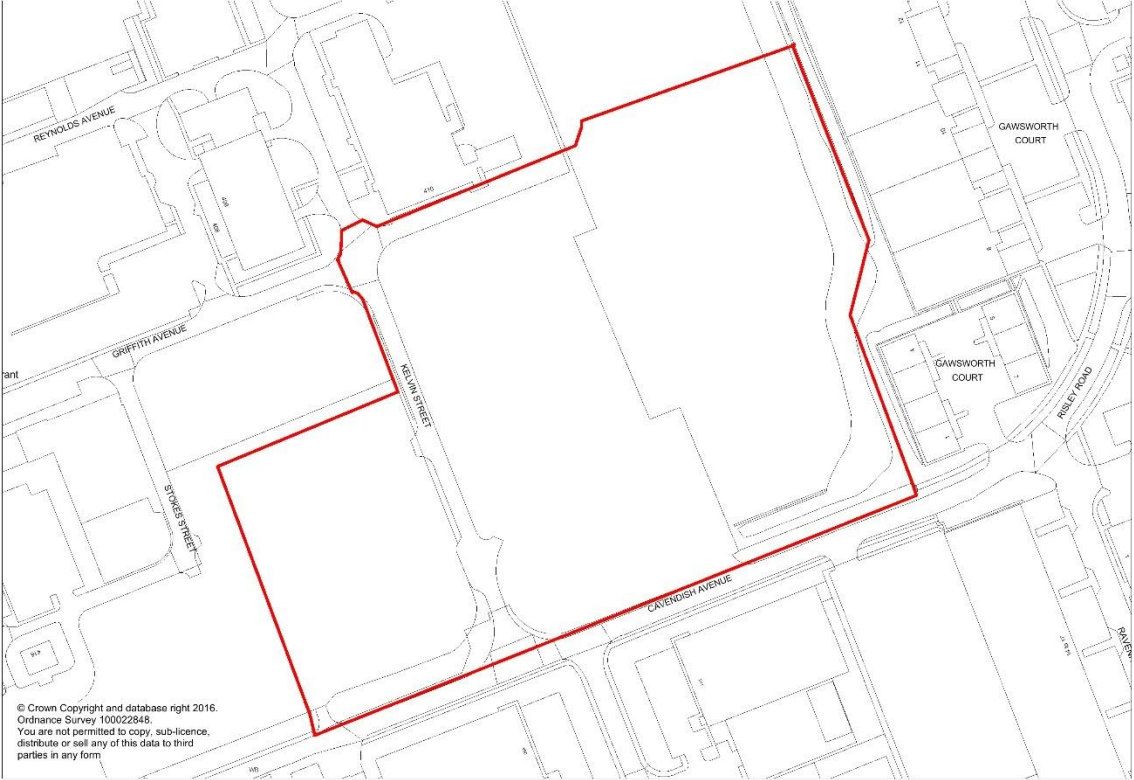
Site Ref: Name	366: Plot R, Lakeside Drive
Owner	Green Dolphin Property LLP
Agent(s)	Knight Frank LLP
Size, ha	0.26
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) In Strategic Green Links Area (Policy CS6) Lakeside Drive is part of the Active Travel Gateway Network (Policy MP3) 2014/24027 – Full consent for an office extension and associated car parking provision
Proposal	Proposed for the erection of a 2,007 sqm office extension and an additional 58 space car park, in two sites south and west of the current office building
Constraints	Flood risk area – Flood Zones 2 and 3
Comments	Part of the curtilage of Sonova House (4,686 sqm), occupied by Phonak. Site currently comprises car parking and landscaping for Sonova House. Office is for the exclusive use of Phonak, to house an additional 46 employees (to 338 staff overall), reflecting predicted business growth over 2015/16.
Likely Development Potential	B1(a) office
Serviced	Yes
Availability, years	1-5

Site 366: Plot R, Lakeside Drive, Warrington, WA1 1RW



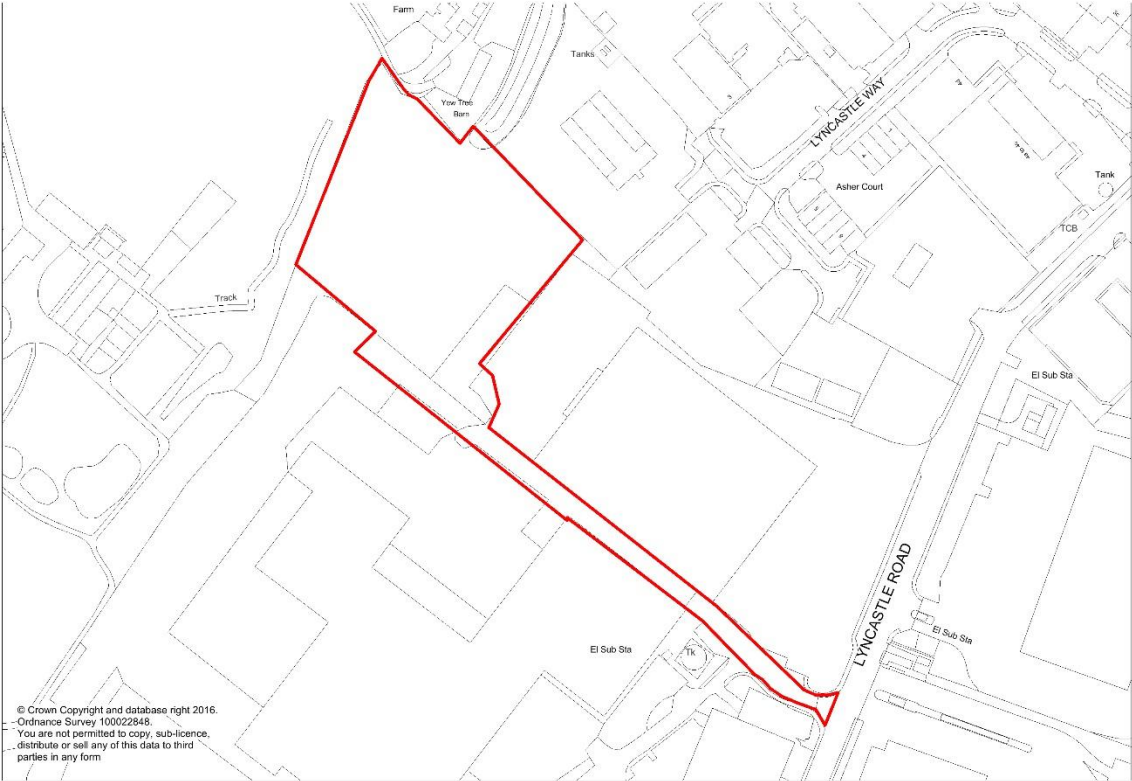
Site Ref: Name	367: The Quadrant (South), Birchwood Park
Owner	Patrizia (Birchwood Park)
Agent(s)	B8, Jones Lang LaSalle
Size, ha	3.64 (of which approx. 1.87 ha remains undeveloped)
Market Availability	Land not available. Completed properties available, to let.
Planning	Within existing Employment Area (Policy PV1) 2014/23358 – Full consent for seven units for general industry and/or warehouse/distribution use (Use Classes B2 and/or B8).
Proposal	Proposed for seven units totalling 12,225 sqm. Units 711 (1,298 sqm), 712 (1,623 sqm) and 713 (2,008 sqm) are completed. 712 is let while 711-713 remain on the market, to let. Thus four units totalling 7,296 sqm remain to be delivered on approx. 1.87 ha of land.
Constraints	Trees onsite Foundations of cleared buildings onsite
Comments	Further units are proposed as primarily B8 options. Further development will be dependent on ongoing market expansion. Some overlap with land to the north which form part of Site 381 (see the below proforma) Falls within the Cheshire Science Corridor Enterprise Zone.
Likely Development Potential	B8
Serviced	Yes
Availability, years	1-5

Site 367: The Quadrant (South), Birchwood Park



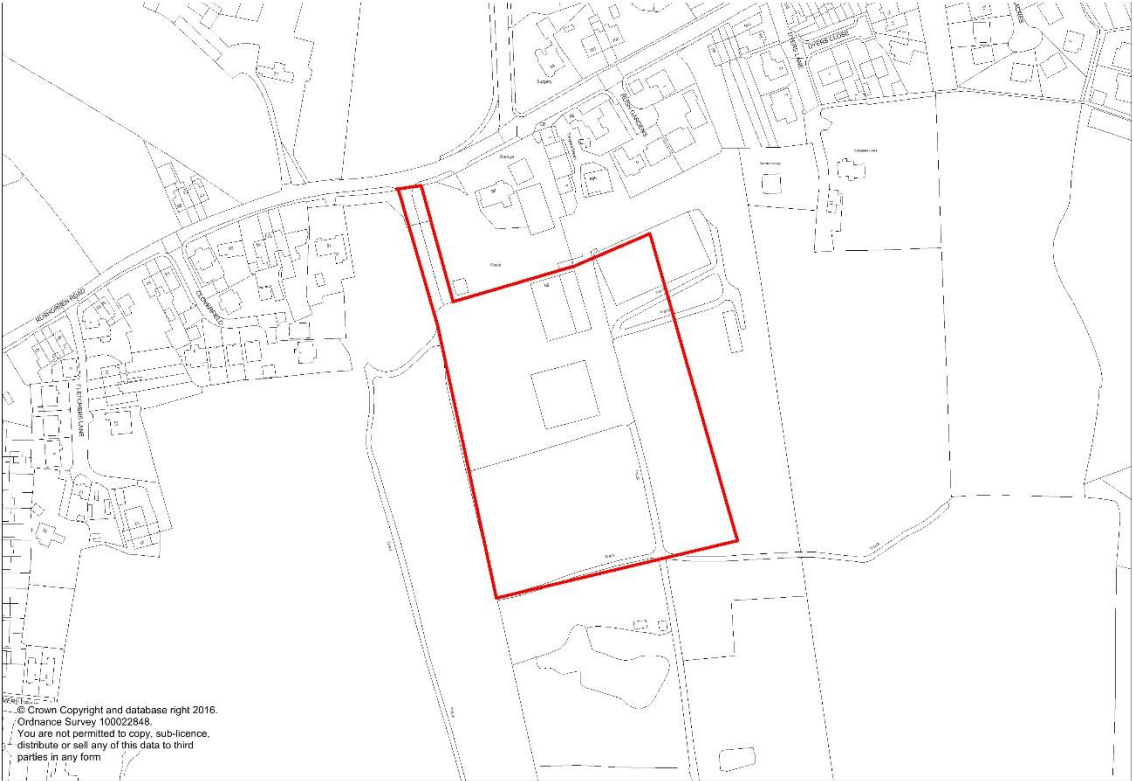
Site Ref: Name	368: Plot 4 - Barleycastle Trading Estate, Lyncastle Road, Appleton Thorne
Owner	Morley Estates
Agent(s)	Roman Summer Associates
Size, ha	1.62 0.73 ha if roads and car parking land is excluded
Market Availability	Not available
Planning	2012/19826 – Full consent for a B8 storage and distribution warehouse with ancillary office/welfare facilities, creation of 39 delivery van parking spaces and 63 car parking spaces Section 106 agreement signed relating to transport contributions Proposal is to meet the exclusive needs of Warburtons. Consent lapsed in May 2016.
Proposal	Proposed for a 2,830 sqm warehousing in a backland site in the north of Barleycastle Trading Estate.
Constraints	Trees onsite Ponds onsite Housing adjacent
Comments	-
Likely Development Potential	N/A
Serviced	No
Availability, years	Assume will not come forward

368: Plot 4 - Barleycastle Trading Estate, Lyncastle Road, Appleton Thorne



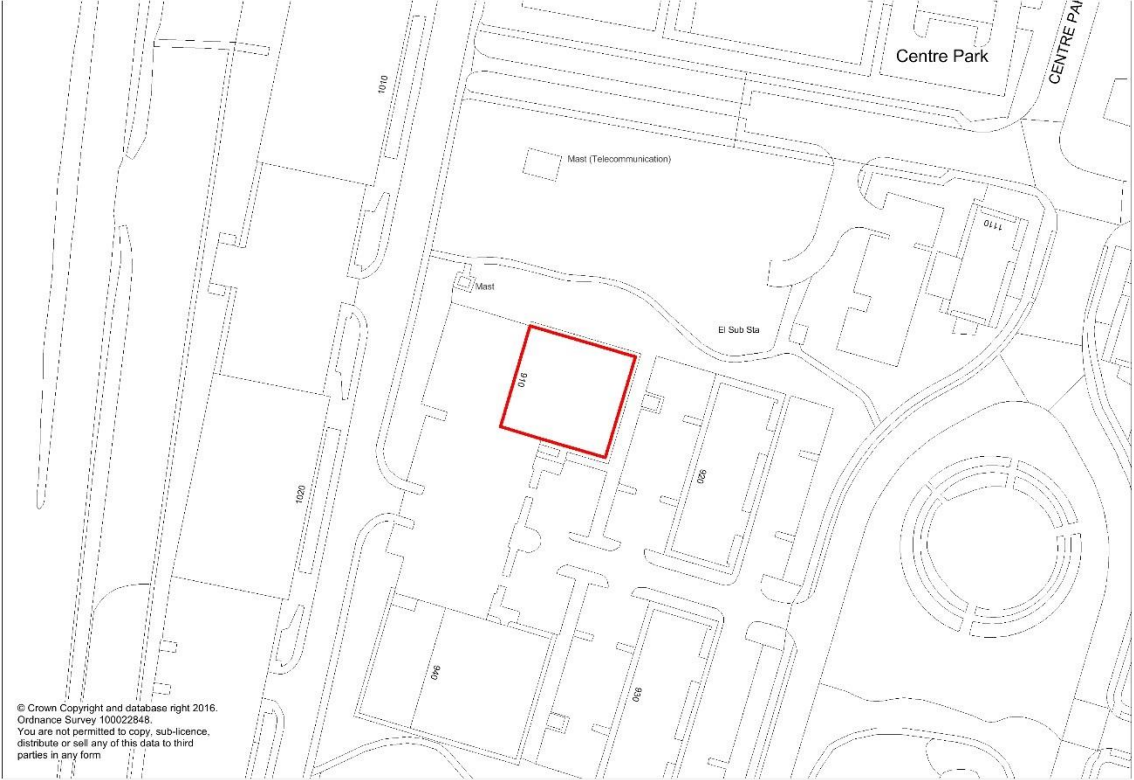
Site Ref: Name	369: Tanyard Farm Estate, Rushgreen Road, Lymm
Owner	Majonet
Agent(s)	Emery Planning Partnership
Size, ha	1.66 0.83 ha if roads and car parking land is excluded
Market Availability	Not available
Planning	In Green Belt (Policy CS5) 2014/24228 – Outline consent for the demolition of existing buildings and erection of replacement buildings (Use Classes B1/B8/D2), alongside associated works to include car parking
Proposal	Proposal is for B1(a), B8 or D2 premises: <ul style="list-style-type: none"> • B1 = 644 sqm (as currently exists on site) • B8 = 1,279 sqm (as currently exists on site) • D2 = 210 sqm (as currently exists on site) Total = 3,250 sqm
Constraints	Trees onsite In Green Belt
Comments	Site currently comprises a number of low quality, prefabricated units, plus temporary structures: <ul style="list-style-type: none"> • Building 3 (1,050 sqm) – Vacant, semi derelict • Building 6 (429 sqm) – In storage use • Building 9 (1,323 sqm) – Large greenhouse, vacant • Building 11 (644 sqm) – Accommodating B1(c) business • Building 12 (390 sqm) – In storage use • Building 14 (810 sqm) – In mixed use accommodating a gym, second business and storage. Proposal is for the redevelopment of the existing premises with no additional B-Class development proposed.
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington

Site: 369: Tanyard Farm Estate, Rushgreen Road, Lymm



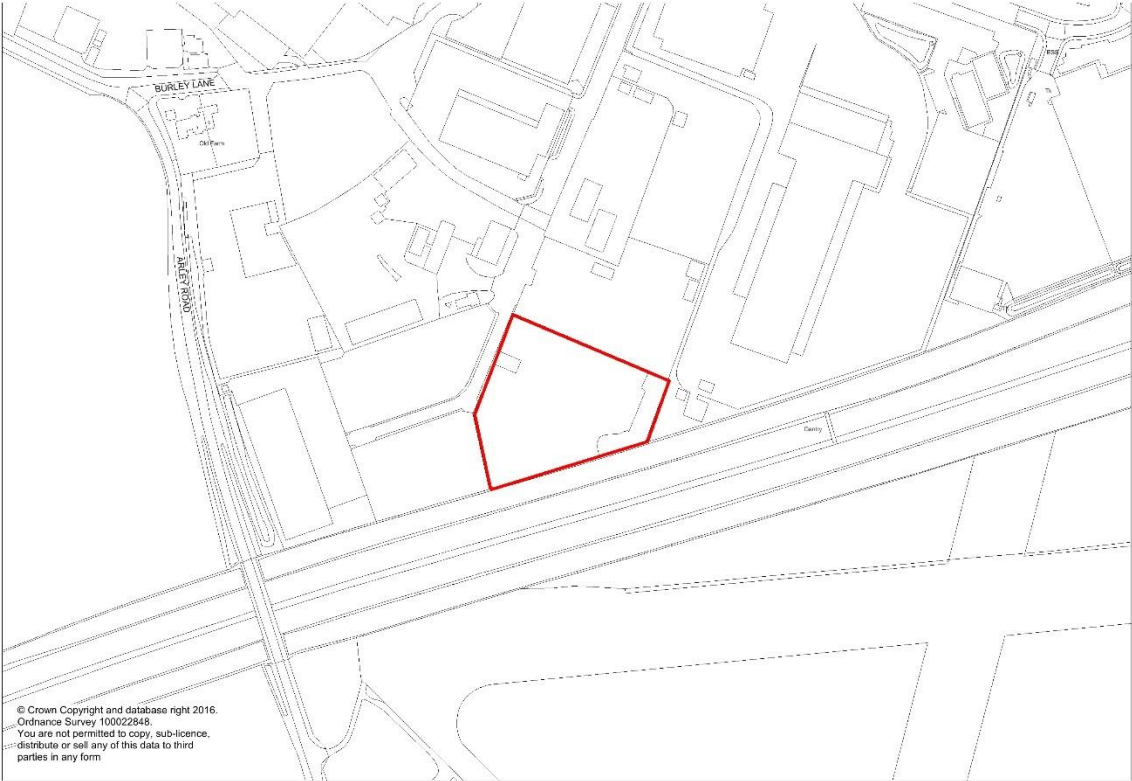
Site Ref: Name	370: Unit 910, Centre Park, Lakeside Drive
Owner	Brevini UK
Agent(s)	AJS Structural Design
Size, ha	0.06
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) In Strategic Green Links Area (Policy CS6) Lakeside Drive is part of the Active Travel Gateway Network (Policy MP3) 2014/24678 – Full consent for a two storey side extension and re-cladding of existing building
Proposal	Proposed for a side extension of 406 sqm for the exclusive use of Brevini UK.
Constraints	Flood risk area – Flood Zone 2
Comments	Site currently comprises car parking and landscaping for Unit 910.
Likely Development Potential	B1(a) office
Serviced	Yes
Availability, years	1-5

Site 370: Unit 910, Centre Park, Lakeside Drive



Site Ref: Name	380: Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington
Owner	Shepard Group Properties (Portasilo)
Agent(s)	Hayward McMullan Architects
Size, ha	0.80 Although in practice, employment land gain is negligible as small property is replacing existing temporary structures
Market Availability	Not available
Planning	2015/26032 – Full consent for a new workshop
Proposal	Proposed for a 460 sqm B2 general industrial unit Will replace and upgrade an existing workshop located to the rear of the site. Intended for the exclusive use of the site owner and occupier.
Constraints	-
Comments	-
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Redevelopment of existing premises. As currently envisaged will not increase the employment land/premises supply in Warrington.

Site 380: Barleycastle Trading Estate, Lyncastle Road, Appleton, Warrington



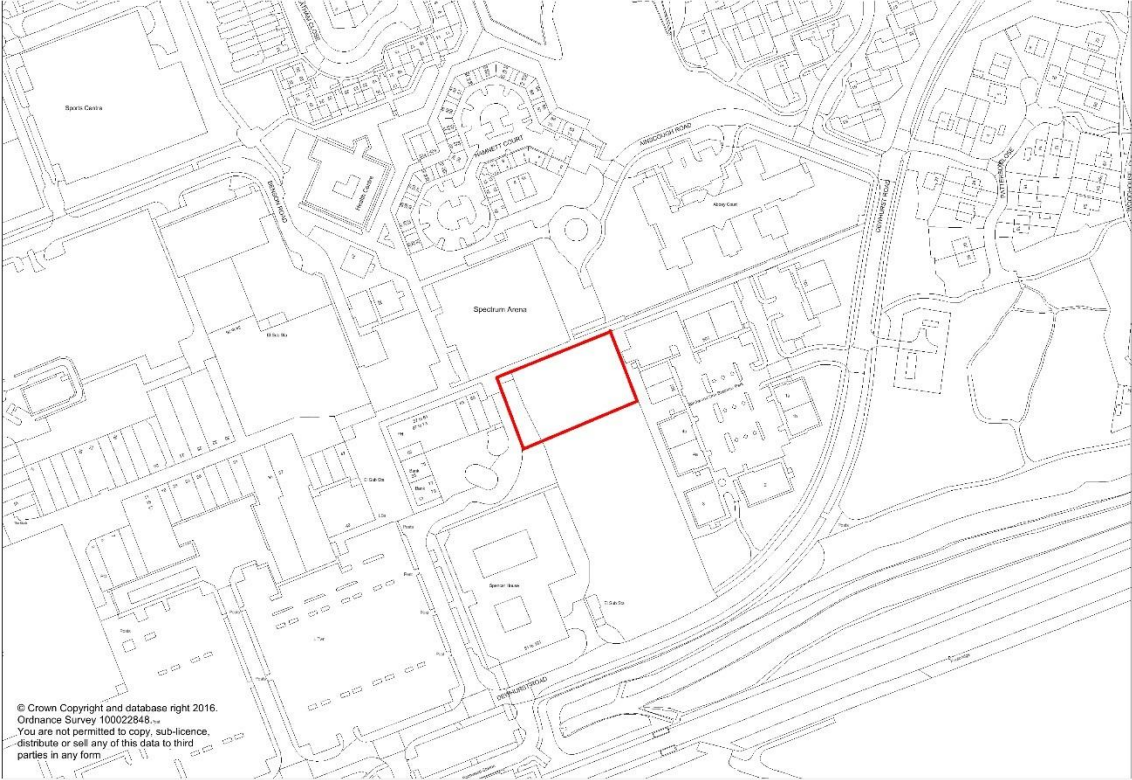
Site Ref: Name	381: Plots 107, 501-502, 611-612, 701-702 and Quadrant, Eastern Edge, Birchwood Park
Owner	Patrizia (Birchwood Park) and AMEC Foster Wheeler
Agent(s)	Turley Associates
Size, ha	11.66
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2015/26044 – Outline consent for the demolition of some existing buildings and erection of offices, light and general industrial and warehousing development (use classes B1, B2 and B8) and ancillary uses (A1/A2/D1/D2)
Proposal	Proposed for up to 50,464 sqm of B1 floorspace, 27,129 sqm of B2/B8 floorspace and 1,000 sqm of A1/A2/D1/D2 floorspace subject to a combined floor area of 70,379 -72,089 sqm. The differing total reflects that at least one plot (701-702) may be developed for different amounts of B1 or B2/B8 floorspace. The permission will assume the demolition of three existing buildings totalling 7,642 sqm. Proposal extends across six parcels of land across Birchwood Park: <ul style="list-style-type: none"> • 107: B1 offices • 300: B1 offices • 501-502: B1 offices • 701-702: B1 offices or B2/B8 • 611-612: B1 offices • Quadrant: B2/B8.
Constraints	-
Comments	Sites: <ul style="list-style-type: none"> • 107 (1.04 ha): Had previous outline planning permission for a B1 office building in 2008 (renewed in 2012); Interest from a private occupier for an office development here • 300 (0.50 ha): Proposed for office uses • 501-502 (2.76 ha): Proposed for office uses. Has a previous consent for some 20,000 sqm of B1(a) space • 611-612 (1.16 ha): Proposed for office or industrial uses, with interest from an existing Park occupier for expansion. Currently accommodates Areva. • 701-702 (4.41 ha): Proposed for industrial uses • Quadrant (1.79 ha, some overlap with Site 367: The Quadrant (South)): The bulk of the site is now marketed for a warehouse pre-let opportunity of 9,754 sqm, referred to as 720 Cavendish Avenue All the plots apart from 611-612 fall within the Cheshire Science Corridor Enterprise Zone All development will be on a design and build basis, responding to individual requirements as they arise. Speculative development is not proposed at this time.
Likely Development Potential	Current likely split: <ul style="list-style-type: none"> • B1(a) – 4.30 ha • B2/B8 – 5.57 ha • B8 – 1.79 ha
Serviced	Yes
Availability, years	10+

Site 381: Plots 107, 501-502, 611-612, 701-702 and Quadrant, Eastern Edge, Birchwood Park



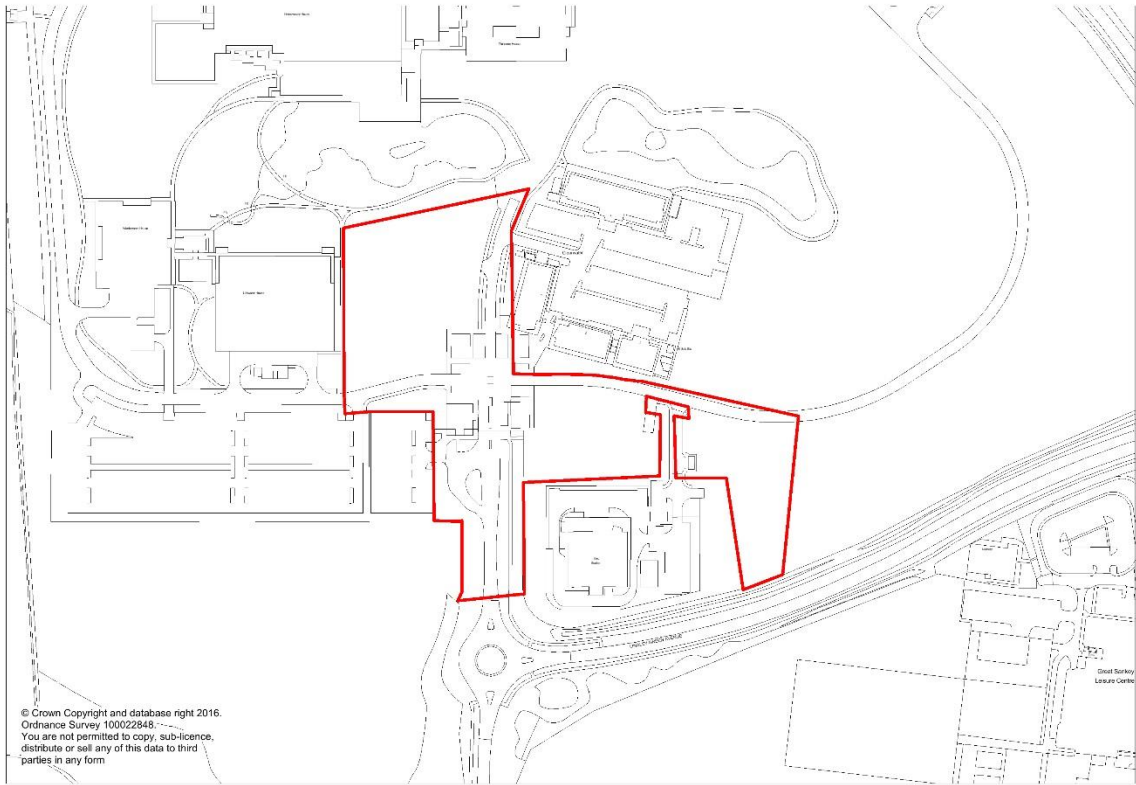
Site Ref: Name	382: Benson Road, Birchwood
Owner	The Trustees of the Done Pension Fund (Betfred)
Agent(s)	-
Size, ha	0.24
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2015/26220 – Outline consent for a two-storey office block with supplementary parking and a link bridge the existing space at the Spectrum Centre
Proposal	Proposed for an additional 2,400 sqm of additional gross internal floorspace
Constraints	Trees onsite
Comments	Office could provide further space for Betfred, a second occupier, or most likely a mix of the two.
Likely Development Potential	B1(a) office
Serviced	No
Availability, years	1-5

Site: 382: Benson Road, Birchwood



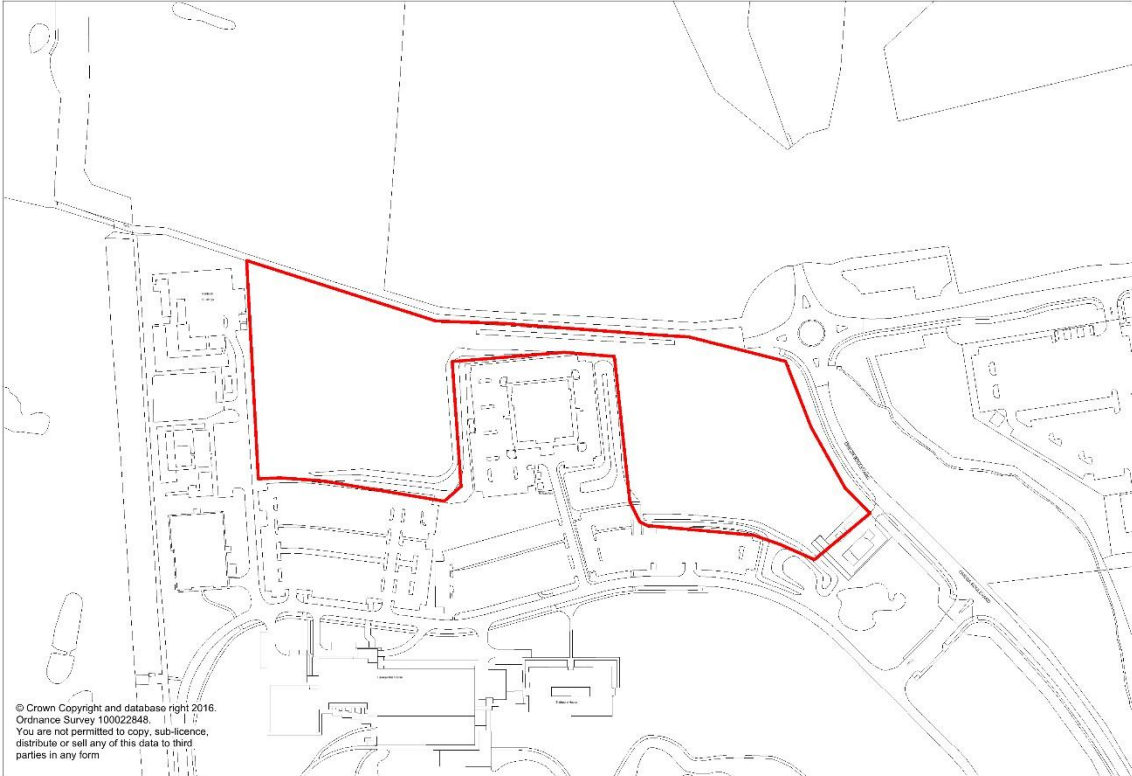
Site Ref: Name	357: Phase 1 Remainder - Lingley Mere
Owner	United Utilities
Agent(s)	Muse Developments, GVA, Edwards and Co.
Size, ha	2.35
Market Availability	On market as design and build options
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) Within existing Employment Area (Policy PV1) 2012/20299 (formally 2004/03286) – Outline consent for 8,808 sqm of floorspace (use class B1(a)). 591 car parking space, access arrangements and associated infrastructure
Proposal	8,808 sqm of offices of 1,858-4,459 sqm
Constraints	Foundations of cleared buildings onsite
Comments	No short term plans for delivery here
Likely Development Potential	B1(a) office
Serviced	Yes
Availability, years	6-10

Site 357: Phase 1 Remainder - Lingley Mere



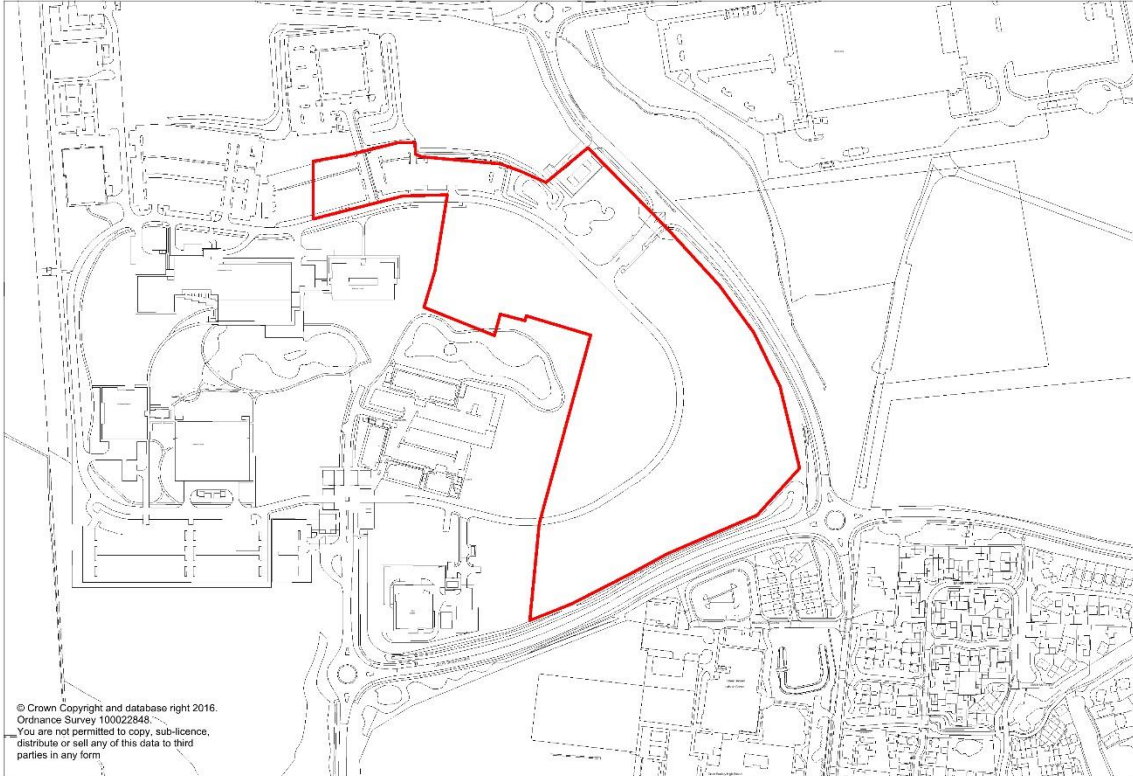
Site Ref: Name	15 A(c): Phase 3 - Lingley Mere
Owner	United Utilities
Agent(s)	Muse Developments, GVA, Edwards and Co.
Size, ha	3.62
Market Availability	Not available
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) Within existing Employment Area (Policy PV1) 2013/21105 (formally 2006/09067) – Outline consent for employment development comprising 1,600 sqm B2; 13,000 sqm B8; 1,250 sqm ancillary B1 and associated uses. Time Limit extended 15 years
Proposal	Proposed for a primarily industrial phase of Lingley Mere, on land east and west of the Grasmere building
Constraints	Trees onsite Ponds onsite
Comments	Most of the frontage of this site now comprises car parking Area likely to support a 9,290 sqm B2/B8 shed, to be built speculatively once funding can be secured. The developers have attempted this previously, but internal requirements to relocate staff parking put the last interest on hold.
Likely Development Potential	Indicative split based on the current consent: <ul style="list-style-type: none"> • B1(a) – 0.29 ha • B2 – 0.36 ha • B8 – 2.97 ha
Serviced	No
Availability, years	6-10

Site 15 A(c): Phase 3 - Lingley Mere



Site Ref: Name	15 A(g): Phase 2 - Lingley Mere
Owner	United Utilities
Agent(s)	Muse Developments (developer), HOW Planning
Size, ha	9.37
Market Availability	Not available
Planning	<p>Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8)</p> <p>Within existing Employment Area (Policy PV1)</p> <p>2016/27313 – Outline consent for demolition of buildings and development of 275 dwellings</p> <p>2013/21109 (formally 2005/06804) – Outline consent for 28,655 sqm of B1 (office) floorspace; 970 car parking spaces and associated works. Time Limit extended 15 years</p> <p>2012/20229 – Outline consent for replacement offices</p>
Proposal	All land is now proposed for housing, or in use for car parking
Constraints	<p>Trees onsite</p> <p>Ponds onsite</p> <p>Includes areas of marshland and sites of ecological value</p>
Comments	-
Likely Development Potential	N/A
Serviced	No
Availability, years	All land now consented for housing

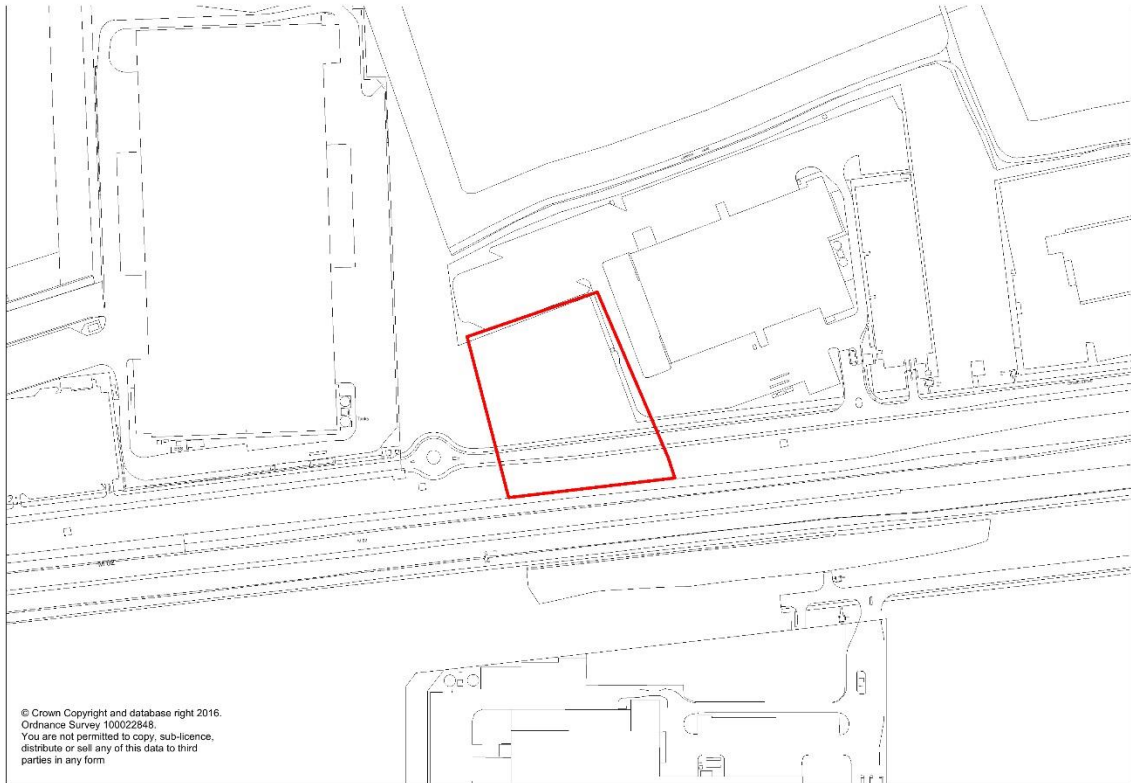
Site 15 A(g): Phase 2 - Lingley Mere



Strategic Sites – Omega

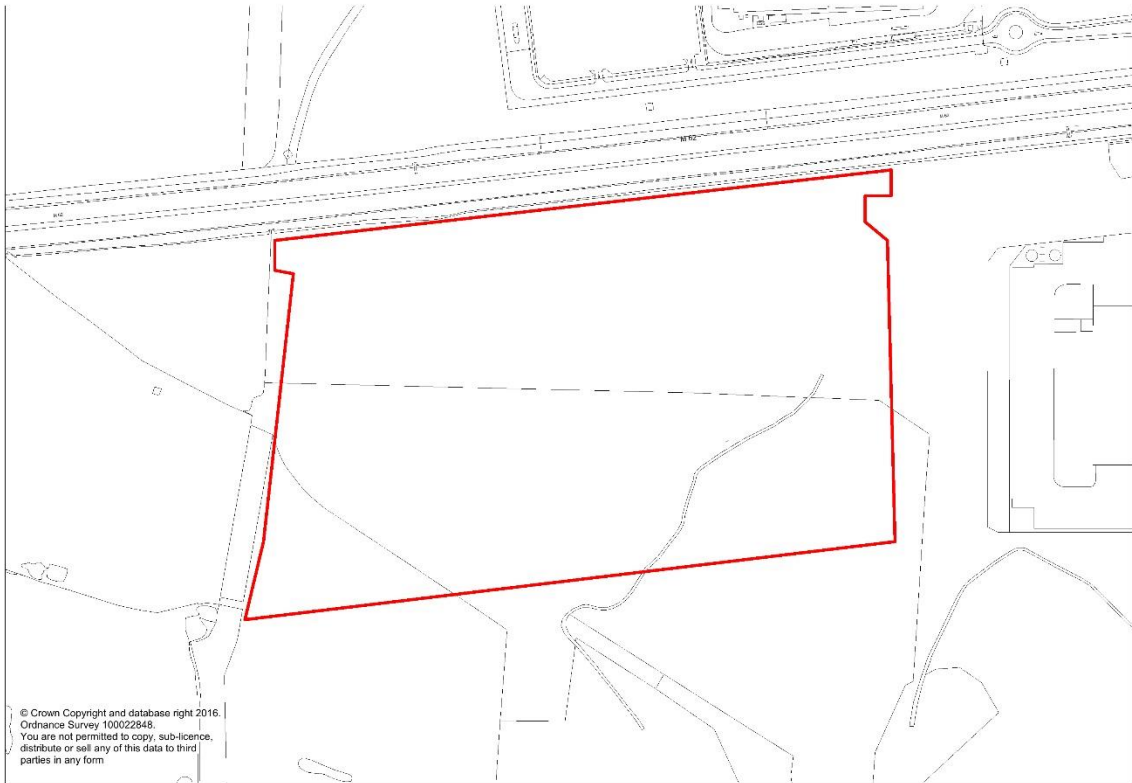
Site Ref: Name	Omega 1 4(L): Omega North - Parcel 4(L)
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer), GVA, Jones Lang LaSalle
Size, ha	2.06
Market Availability	Marketed as a design and build opportunity for a B2/B8 unit of up to 5,574 sqm
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) Falls within 2003/01449 – General Outline consent for Omega Phases 1 & 2 involving phased redevelopment for primarily employment uses (offices, industrial, storage & distribution) with associated development for subsidiary uses (retail, food and drink, non-residential institutions and hotel), and associated car parking, landscaping and infrastructure.
Proposal	Remaining plot on Omega North, marketed for B2/B8 options comparable to that already developed. 1.32 ha here is also proposed for development as offices and a parts and service facility for Haydock Commercial Vehicles. It is expected that this will be completed by the end of 2017. Other land in this area, extending to 1.89 ha and incorporating additional land, previously held by Travis Perkins, was purchased in September 2016 by Brackley Property Developments. It is intended that the area will be promoted for design and build industrial or distribution uses, to accommodate units from 5,000 sqm to a maximum single unit of 8,500 sqm.
Constraints	-
Comments	-
Likely Development Potential	Strategic – B2/B8
Serviced	No
Availability, years	1-5

Site: Omega 1 4(L): Omega North – Parcel 4(L)



Site Ref: Name	Omega 7A: Omega South - Plot 7A
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer)
Size, ha	17.68
Market Availability	Not available
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 2014/24372 – Reserved Matters consent on appearance, landscaping, layout and scale following approval of outline permission 2014/2329 – Outline consent for up to 196,000 sqm of B2/B8 space across all of the Zone 7 sites.
Proposal	Now developed as a 63,638 sqm new HQ for The Hut Group
Constraints	-
Comments	Development complete
Likely Development Potential	N/A
Serviced	Yes
Availability, years	Developed site.

Site: Omega 7A: Omega South - Plot 7A



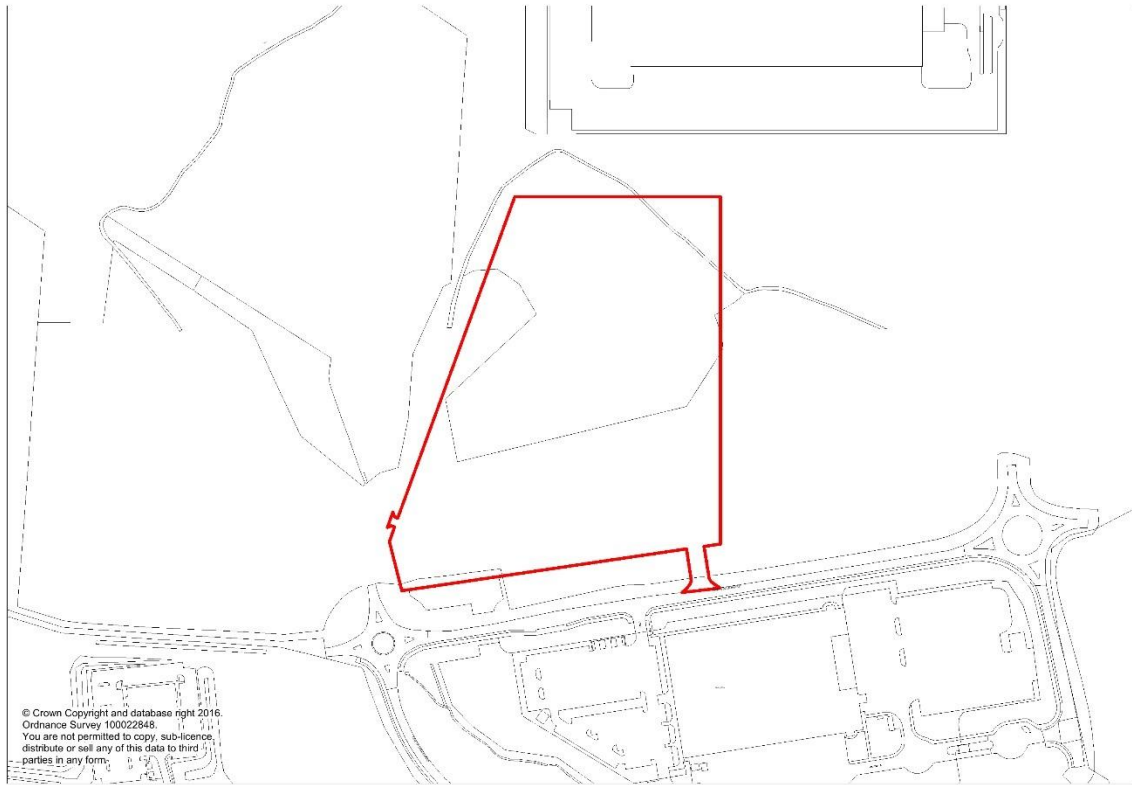
Site Ref: Name	Omega 7C: Plot 7C Omega South
Owner	LondonMetric
Agent(s)	Miller Developments (developer), DTRE, Jones Lang LaSalle
Size, ha	7.65
Market Availability	On the market as 'Prime@Omega'. Available leasehold.
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 2015/26884 – Reserved Matters consent for a logistics facility (Use Class B8) with ancillary office, associated car parking, landscaping and site access following outline planning permission 2014/2329 – Outline consent for up to 196,000 sqm of B2/B8 space across all of the Zone 7 sites.
Proposal	Under construction as a 33,000 sqm B8 warehouse property.
Constraints	-
Comments	Development under construction, expected completion by autumn 2016
Likely Development Potential	Strategic – B2/B8
Serviced	Yes
Availability, years	0-1

Site: Omega 7C: Plot 7C Omega South



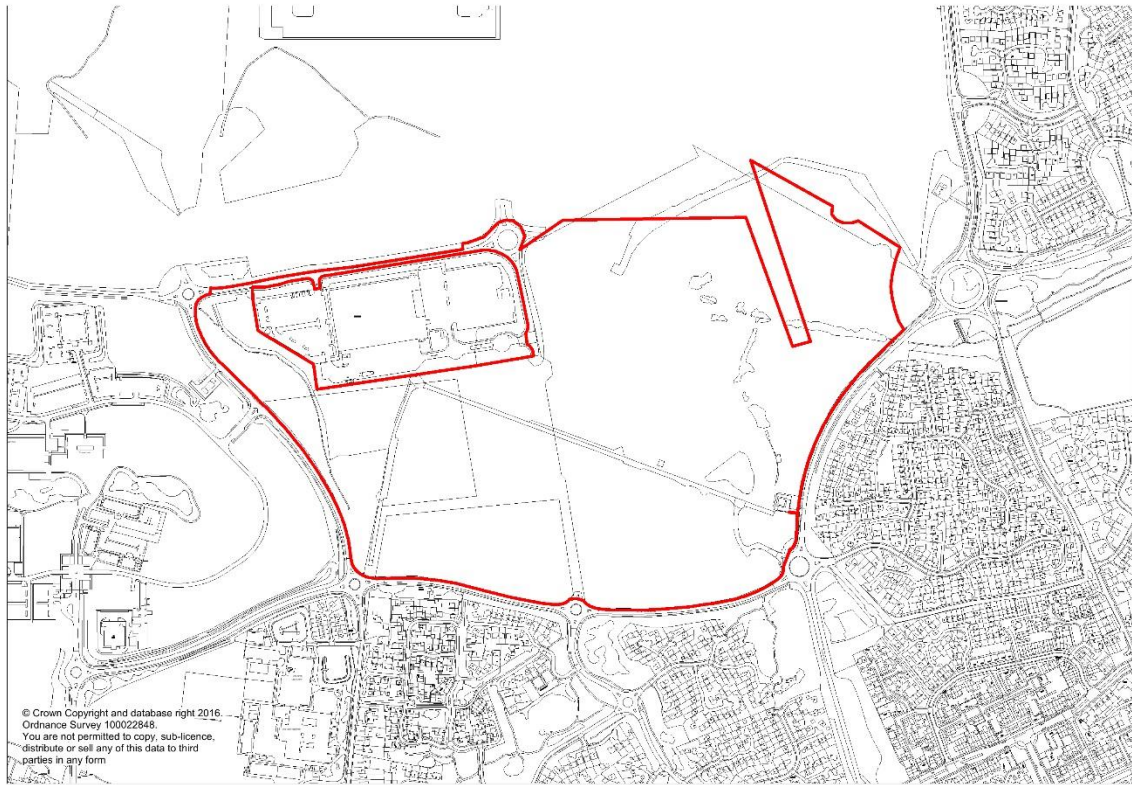
Site Ref: Name	Omega 7D: Omega South - Plot 7D
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer)
Size, ha	8.12 Of which 4.92 ha is now developed with 3.20 ha remaining.
Market Availability	Not available
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 2014/24677 – Reserved Matters consent for reserved matters following outline planning permission 2014/2329 – Outline consent for up to 196,000 sqm of B2/B8 space across all of the Zone 7 sites.
Proposal	Now developed as a 18,580 sqm manufacturing plant for Plastic Omnium.
Constraints	-
Comments	Remaining land will be held for the expansion of Plastic Omnium, or a future occupier.
Likely Development Potential	Strategic – B2/B8
Serviced	Yes
Availability, years	6-10

Site: Omega 7D: Omega South - Plot 7D



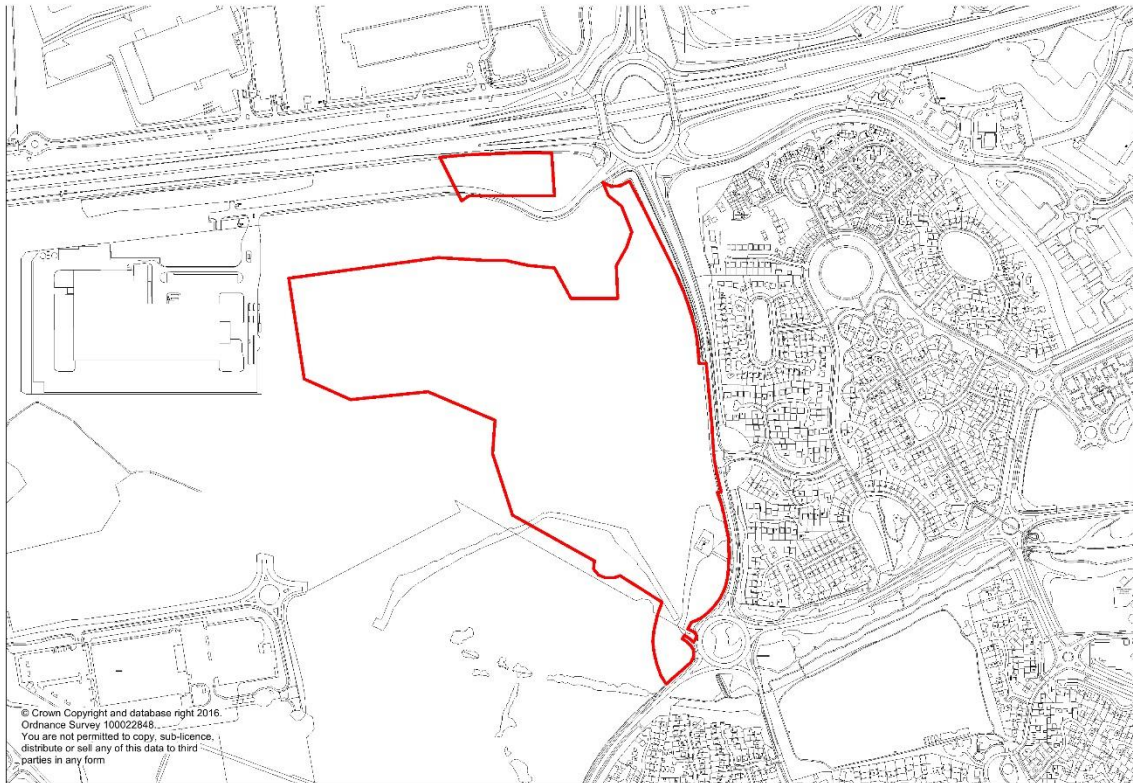
Site Ref: Name	Omega Phase 3 Remainder: Omega Phase 3
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer)
Size, ha	51.36
Market Availability	Not available
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 2015/26469 – Outline consent for 1100 homes and a zone in the north east for some 10,000 sqm of retail (Use Classes A1-5), hotel (Use Class C1), Extra Care facility (80 bed, Use Class C2), Non-residential institutions (Use Class D1)
Proposal	Now proposed for a housing-led scheme, along with 48 ha of ecological and landscaped land.
Constraints	Trees onsite Various footpaths cross the site Includes some Grade 2 agricultural land Includes some areas of contaminated land Includes some areas containing protected species Main river route passes through west of site
Comments	Land now lost to alternative uses
Likely Development Potential	N/A
Serviced	No
Availability, years	Will be developed for non B-Class uses.

Site: Omega Phase 3 Remainder: Omega Phase 3



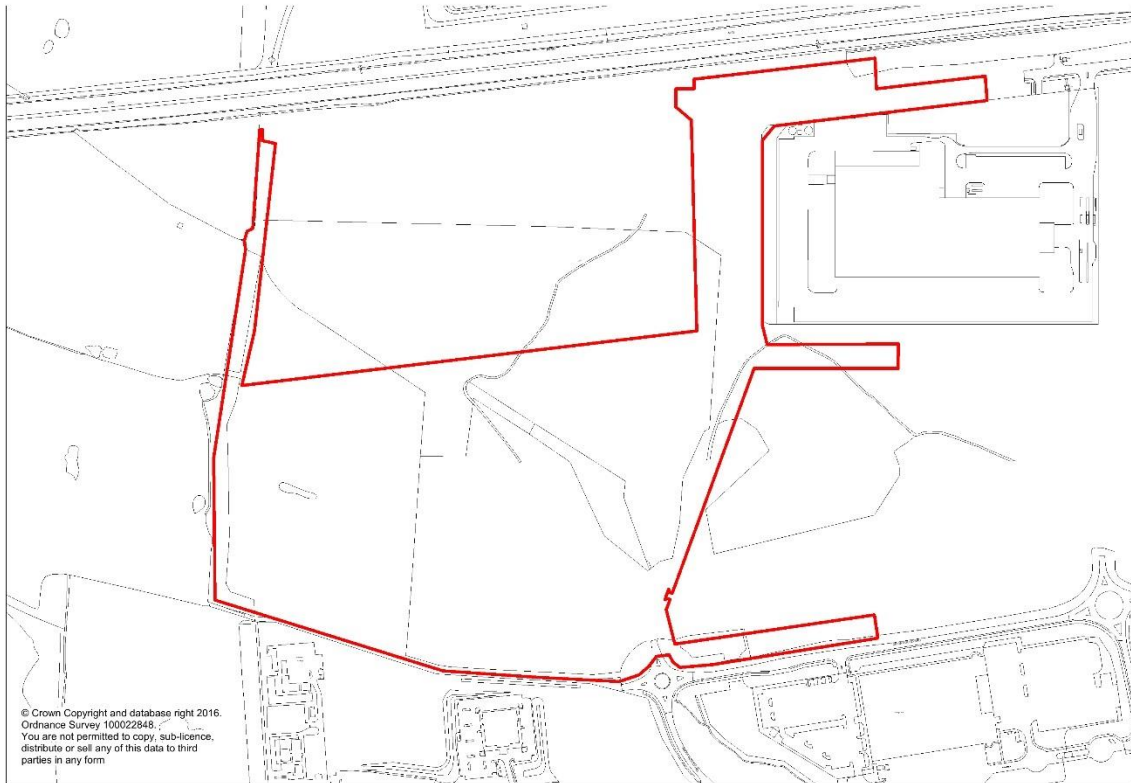
Site Ref: Name	Omega Phases 1 and 2 Remainder
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer)
Size, ha	29.06
Market Availability	On the market
Planning	<p>Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8)</p> <p>2013/22086 (previously 2003/01449) – Outline consent for a phased redevelopment for primarily employment uses (B1, B2, B8) with associated development for subsidiary uses (retail, food and drink, non-residential institutions and hotel), and associated car parking, landscaping and infrastructure, including demolition of existing structures on site.</p> <p>2015/26475 and 2016/27338 – Revised consents, varying several conditions and limiting the gross floor areas to 256,317 sqm, of which no more than 74,260 sqm gross is to be used for B1 purposes; 155,781 sqm is to be used for B2/B8 purposes (comprising 100,039 sqm; B8 Omega Phase 1 55,742 sqm B2/B8 Omega Phase 2); 16,723 sqm shall be used for B2 purposes (Omega Phase 2); 11,150 sqm gross for a hotel (Class C1) purposes and no more than 1,200 sqm, for A1/A3/A4/A5 and D1 purposes</p> <p>2016/27588 – Reserved matters consent for a manufacturing (B2) and Logistics (B8) facility with associated car parking, landscaping and site access, creation of new infrastructure road and secondary substation</p>
Proposal	<p>Omega masterplan identifies the western portion for further manufacturing and logistics units of up to 23,226 sqm, the eastern section is proposed for offices and non B-Class use.</p> <p>2.79 ha now has reserved matters consent for a 10,870 sqm supply chain centre, to be developed for the exclusive use of Domino's Pizza.</p>
Constraints	<p>Trees onsite</p> <p>Ponds onsite</p> <p>Includes some areas of contaminated land</p> <p>Includes some areas containing protected species</p>
Comments	-
Likely Development Potential	Primarily Strategic – B2/B8 (with some B1)
Serviced	No
Availability, years	6-10

Site: Omega Phases 1 and 2 Remainder



Site Ref: Name	Omega Zone 7 Remainder: Omega South - Zone 7
Owner	The Homes and Communities Agency
Agent(s)	Miller Developments (developer)
Size, ha	33.70
Market Availability	On the market for design and build options
Planning	Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 2014/2329 – Outline consent for up to 196,000 sqm of B2/B8 space across all of the Zone 7 sites
Proposal	Omega masterplan identifies this site for industrial and/or logistics options, in one or two development plots, of up to 83,613 sqm.
Constraints	Trees onsite Ponds onsite Includes some areas of contaminated land Includes some areas containing protected species
Comments	-
Likely Development Potential	Strategic – B2/B8
Serviced	No
Availability, years	1-5

Site: Omega Zone 7 Remainder: Omega South - Zone 7



Appendix 4

Sites Scoring System

Appendix 4 – Site Scoring System

Site Location and Access	Proximity to strategic highway network	<ul style="list-style-type: none"> • Site adjacent to primary route (motorway, strategic highways network or county route) - M6, M62, M56, A49 junction– score 10 • Site 0.5 km from primary route – score 9 • Site 1.0 km from primary route – score 8 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary route scores zero.
	Proximity to key local routes	Proximity to key local routes (A49, A50, A57, A56): <ul style="list-style-type: none"> • Site within 1.0 km from A49, A50, A57, A56 junction – score 10 • Site within 5.0 km from A49, A50, A57, A56 junction – score 6 • Site within 10.0 km from A49, A50, A57, A56 junction – score 3 • Site more than 10.0 km from A49, A50, A57, A56 junction – score 0.
	Prominence	<ul style="list-style-type: none"> • Site adjacent to, and visible from M6, M62, M56 or A49 – score 10/9 • Site adjacent to, and visible from other dual carriageway – score 8/7 • Site adjacent to, and visible from other A road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	<ul style="list-style-type: none"> • Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
Planning Status		<ul style="list-style-type: none"> • If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	<ul style="list-style-type: none"> • If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access), planning, or legal Reduce score by 2 for each constraint If there are none – score 10

	Environmental Setting	<p>Subjective, score 0 to 10, examples:</p> <ul style="list-style-type: none"> • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	<p>Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.</p>
Site Availability		<ul style="list-style-type: none"> • Site available to develop within 0-1 year – score 10 • Site available to develop within 1-5 years – score 6 • Site available to develop 6-10 years – score 3 • Site available to develop 10+ years – score 0

Source: BE Group, 2016

Appendix 5

Sites Scoring Results

Site Name	Revised Size (ha)	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market - led Sub-total	Likely Use	Constraints
		Road Proximity - Strategic Highway	Road Proximity - Local	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility					
Plot 7C Omega South	7.65	6	6	3	5	10	10	10	10	8	10	78	33	Industrial	None
Omega North - Parcel 4(L)	2.06	8	6	10	5	8	7	10	10	6	6	76	40	Industrial	None
Plots 107, 501-502, 611-612, 701-702 and Quadrant, Eastern Edge, Birchwood Park	11.66	7	6	4	10	8	10	10	10	10	0	75	37	Office/Industrial	None
Land off Bewsey Road	0.15	8	10	3	10	10	10	8	4	1	10	74	26	Office/Industrial	Flood risk area – Flood Zone 3.
The Quadrant (South), Birchwood Park	1.87	7	6	4	10	10	10	6	10	5	6	74	32	Industrial	Trees onsite Foundations of cleared buildings onsite
Omega Phases 1 and 2 Remainder	26.27	10	6	10	5	8	7	2	10	10	3	71	46	Office/Industrial	Trees onsite Ponds onsite Includes some areas of contaminated land Includes some areas containing protected species
Phase 1 Remainder - Lingley Mere	2.35	6	10	4	5	8	10	8	10	6	3	70	36	Office	Foundations of cleared buildings onsite
Gemini 8 Retail Park, Charon Way, Westbrook	5.21	9	6	3	5	8	7	10	9	6	3	66	33	Office/Industrial	None
Land at Stanley Street	0.05	9	10	6	10	8	7	4	7	0	3	64	32	Office	Small tightly defined site overlooked by Telephone Exchange building Flood risk area – Flood Zone 3 Conservation Area adjacent
Phase 3 - Lingley Mere	3.62	7	10	4	5	8	7	6	10	7	0	64	38	Office	Trees onsite Ponds onsite
Omega South - Zone 7	33.70	6	6	3	5	8	7	2	10	10	6	63	35	Industrial	Trees onsite Ponds onsite Includes some areas of contaminated land Includes some areas containing protected species
Benson Road, Birchwood	0.24	2	6	3	10	8	7	8	8	1	6	59	20	Office	Trees onsite
Gemini 16, Westbrook	2.20	8	6	6	5	8	7	0	6	3	3	52	29	Office/Industrial	Trees onsite Ponds onsite Streams cross the site Access to Westbrook Crescent, from eastern land, is now limited by housing development site Site has claw back conditions regarding any value derived
Forrest Way Business Park, Forrest Way	7.50	4	6	2	5	10	7	0	2	8	3	47	22	Office/Industrial	In food risk area – Flood Zone 3 (some existing flood defence bunding onsite) A pipeline, subject to HSE PADHI exclusion zone, runs across the site. Land affected is proposed for ecological mitigation. Main sewer routes run across the site, restricting development in some locations Pylons cross the site Public right of way bounds the site (Trans-Pennine Trail) Trees onsite Site uneven in places Wildlife Corridors cross the site Some site contamination

Appendix 6

OAN Forecast Calculations

Appendix 6 – Objectively Assessed Needs Forecast Calculations

This appendix details the calculations undertaken to convert jobs projections, for the two forecast scenarios into land need projections.

Oxford Economics - 2016-2037

Sector	2016 Jobs (,000)	2037 Jobs (,000)	Jobs Change 2016-2037	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
Agriculture, etc.	0.40	0.30	(100)	5	(5)	12	(60)
Mining and quarrying	0.00	0.00	0	-	-	-	-
Manufacturing	7.50	5.60	(1,900)	100	(1900)	47	(89,300)
Electricity, gas and water	2.40	1.90	(500)	26	(130)	12	(1,560)
Construction	9.10	12.40	3,300	26	858	12	10,296
Distribution	20.60	22.60	2,000	48	960	70	67,200
Transport and storage	8.70	9.30	600	48	288	70	20,160
Accommodation and food services	8.90	10.10	1,200	-	-	-	-
Information and communications	5.60	6.80	1,200	100	1200	12	14,400
Financial and business services	38.70	49.80	11,100	100	11,100	12	133,200
Government services	26.50	27.30	800	22	176	12	2,112
Other services	7.70	9.70	2,000	22	440	12	5,280
Total	136.10	155.80					

Source: Oxford Economics, 2016; HCA, 2015; BE Group, 2016

- From sectors predicted to grow: 252,648 sqm – 64.78 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: (90,920 sqm) – 23.31 ha (at 3,900 sqm/ha).

Cambridge Econometrics - 2016-2037

Sector	2016 Jobs (,000)	2037 Jobs (,000)	Jobs Change 2016-2037	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
Agriculture, etc.	0.6	0.5	(100)	5	(5)	12	(60)
Mining and quarrying	0.0	0.0	0	-	-	-	-
Manufacturing	7.5	4.6	(2,900)	100	(2900)	47	(136,300)
Electricity, gas and water	3.0	3.3	300	26	78	12	936
Construction	9.4	10.1	700	26	182	12	2,184
Distribution	22.2	23.9	1,700	48	816	70	57,120
Transport and storage	11.0	11.8	800	48	384	70	26,880
Accommodation and food services	8.3	11.8	3,500	-	-	-	-
Information and communications	5.1	5.8	700	100	700	12	8,400
Financial and business services	43.2	53.6	10,400	100	10,400	12	124,800
Government services	26.8	29.4	2,600	22	572	12	6,864
Other services	7.2	8.0	800	22	176	12	2,112
Total	144.5	162.8					

Source: Cambridge Econometrics, 2016; HCA, 2015; BE Group, 2016

- From sectors predicted to grow: 229,296 sqm – 58.79 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: (136,360 sqm) – 34.96 ha (at 3,900 sqm/ha).

Cambridge Econometrics – Calculation of Past Take Up 1996-2016

Sector	1996 Jobs (,000)	2016 Jobs (,000)	Jobs Change 1996-2016	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
Agriculture, etc.	0.4	0.6	200	5	10	12	120
Mining and quarrying	0.0	0.0	0	-	-	-	-
Manufacturing	16.8	7.5	(9,300)	100	(9300)	47	(437,100)
Electricity, gas and water	2.4	3.0	600	26	156	12	1,872
Construction	8.3	9.4	1,100	26	286	12	3,432
Distribution	23.1	22.2	(900)	48	(432)	70	(30,240)
Transport and storage	5.0	11.0	6,000	48	2880	70	201,600
Accommodation and food services	5.0	8.3	3,300	-	-	-	-
Information and communications	3.6	5.1	1,500	100	1500	12	18,000
Financial and business services	21.8	43.2	21,400	100	21,400	12	256,800
Government services	16.7	26.8	10,100	22	2222	12	26,664
Other services	4.1	7.2	3,100	22	682	12	8,184
Total	107.2	144.5					

Source: Cambridge Econometrics, 2016; HCA, 2015; BE Group, 2016

- From sectors predicted to grow: 516,672 sqm – 132.48 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: (467,340 sqm) – 119.83 ha (at 3,900 sqm/ha).

Cambridge Econometrics – Calculation of Past Take Up 2000-2007

Sector	2000 Jobs (,000)	2007 Jobs (,000)	Jobs Change 2000-2007	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
Agriculture, etc.	0.2	0.3	100	5	5	12	60
Mining and quarrying	0.1	0.0	(100)	5	(5)	12	(60)
Manufacturing	10.5	9.3	(1,200)	100	(1,200)	47	(56,400)
Electricity, gas and water	2.6	3.6	1,000	26	(260)	12	(3,120)
Construction	8.3	9.8	1,500	26	390	12	4,680
Distribution	23.0	22.0	(1,000)	48	(480)	70	(33,600)
Transport and storage	6.1	7.2	1,100	48	528	70	36,960
Accommodation and food services	7.1	6.5	(600)	-	-	-	-
Information and communications	5.9	6.7	800	100	800	12	9,600
Financial and business services	25.0	28.1	3,100	100	3100	12	37,200
Government services	21.2	24.3	3,100	22	682	12	8,184
Other services	5.3	4.7	(600)	22	132	12	(1,584)
Total	115.4	122.6					

Source: Cambridge Econometrics, 2016; HCA, 2015; BE Group, 2016

- From sectors predicted to grow: 99,804 sqm – 25.59 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: (98,844 sqm) – 25.34 ha (at 3,900 sqm/ha).