



Warrington EDNA Refresh

Warrington Borough Council

Final Report

August 2021

CONTENTS

EXECUTIVE SUMMARY	1
1.0 INTRODUCTION	8
2.0 STRATEGIC CONTEXT UPDATE.....	15
3.0 PROPERTY MARKET ASSESSMENT.....	29
4.0 EMPLOYMENT LAND SUPPLY UPDATE	64
5.0 REGULATION 18 SITES REVIEW	78
6.0 WARRINGTON'S WIDER ECONOMIC GEOGRAPHY	104
7.0 OBJECTIVELY ASSESSED NEEDS.....	137
8.0 CONCLUSIONS	167
9.0 RECOMMENDATIONS	186

Appendix 1 – List of Consultees

Appendix 2 – Warrington Vacant Property Schedule

Appendix 3 – Employment Site Proformas

Appendix 4 – Site Scoring System

Appendix 5 - Sites Scoring Results

Appendix 6 - Cambridge UK Forecast Assumptions

Appendix 7 – Oxford Economics Forecast Assumptions

EXECUTIVE SUMMARY

Introduction

- i) This report provides an economic development (employment land) needs assessment for Warrington Borough. It was commissioned to provide an up to date and proportionate 'refresh' of the Council's Economic Development Needs Assessment (EDNA), produced in 2019 by BE Group and Mickledore. The reasons for this update include:
- To support development of the Proposed Submission Version Local Plan (PSVLP)
 - To reflect a revised local plan period, 2021-2038, compared to the previously used 2017-2037
 - To reflect changes to national planning policy and guidance – National Planning Policy Framework, National Planning Policy Guidance and Use Class Order Changes
 - To reflect national issues including the exit of the United Kingdom from the European Union and the potential impacts of the Covid-19 Pandemic
 - The fact that Fiddlers Ferry Power Station will now likely become available for employment development within the Plan period, and that the site is now being actively promoted for inclusion as such in the Local Plan by the owners
 - To ensure the Borough's economic development needs are considered in the context of the Borough's housing needs in order to provide a balanced Local Plan spatial strategy.

Methodology

- ii) Several research methods have been used, including site visits and telephone/e-meeting interviews with property market stakeholders such as developers, investors and their agents. The Wider Economic Geography of Warrington has been identified and the property market in the local authority areas within that Geography has been reviewed through desktop analysis of employment and planning strategies, and consultations with officers from those local authorities. The methodology follows Planning Practice Guidance on employment land reviews.

Market Findings

- iii) In response to the Covid-19 Pandemic and resulting national lockdowns, a greater part of the retail and wholesale market moved online. This growth in e-commerce has boosted an already strong logistics market and delivered record national take up for

B8 uses in 2020.

- iv) The North West reflects this high demand but lacks the supply to fully capitalise on this growth. This is reflected in Warrington where only 12.7 ha remains at Omega and that 12.7 ha will be taken up by 2022. Unsurprisingly, given this limited supply, stakeholders are clear that the Borough needs further land allocations. As in the 2016 and 2019, where growth locations are mentioned, South East Warrington is put forward to take advantage of the key M56/M6 links and provide strategic B2/B8 options.
- v) Local industrial demand is for industrial and warehouse premises across a range of sizes up to 9,000 sqm. There is continued demand for strategic logistics units of 9,000-35,000 sqm to compete in the regional/national market. Prime rent for a high-quality unit under 2,000 sqm sits at around £7.75/sqft (£83/sqm). For 'big box' units, prime rent appears to be around £7/sqft (£75/sqm), rising slightly to £7.20/sqft (£78/sqm) at Omega where a shortage of supply has pushed up rents.
- vi) As a high proportion of Warrington's office staff worked from home in 2020/21, the Borough's office market saw some of its weakest recent performance. However, while the events of 2020/21 have retarded the market overall, demand for office space continues and stakeholders were broadly confident the market would recover in time, even if the parameters of what types of space are required, change. Market interest is for smaller suites of sub 500 sqm and particularly sub-350 sqm, to meet micro/small business needs and, also, larger HQ office facilities of up to 2,000 sqm. Demand has included requirements from companies seeking to decrease or increase their business space to meet the demands of social distancing or having a portion of their staff work from home.
- vii) Demand is mostly local or sub-regional, with interest focused in Birchwood rather than Warrington Town Centre. Despite this, key local agencies such as Warrington and Co. highlighted a number of opportunities for the delivery of new office space in Warrington Town Centre and were confident that at least some of these could be brought forward, in the long term at least, to build up the modest office economy of Central Warrington. Warrington may derive some benefits from Manchester/Liverpool based businesses looking for lower density options, outside of urban areas, for socially distanced working. However, the consensus of stakeholders is that cities will remain attractive places for a majority of businesses to work from.

- viii) The Wider Economic Geography of Warrington includes most of Wigan Borough, and the western portions of Trafford and Salford in Greater Manchester. The northern areas of Cheshire West and Chester and Cheshire East have strong links, as do Halton and St Helens, in the Liverpool City Region. Although geographically more distant, Warrington also has good links with the urban centres of Manchester and Liverpool. Within this wider area, the following economic issues are noted:
- Of the strategic sites which may compete with Omega, and its successors, for B2/B8 requirements. Magnitude is the most significant existing site and Parkside is likely to be most significant in the future. Existing schemes in Cheshire and the Liverpool City Region, such as 3MG, Widnes, continue to grow. However, against the scale of potential needs from the growing Port of Liverpool, the programmed strategic supply in the Liverpool City Region remains modest, creating ongoing opportunities for sites in Warrington
 - 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. Developments such as Fiddlers Ferry could further increase these linkages
 - Between Sci-Tech and The Heath, Runcorn and the Cheshire Science Corridor Enterprise Zone Sites, Warrington's Wider Economic Geography appears well catered for with science themed facilities
 - The proximity of Manchester City Centre, the Airport Gateway area and Salford City Centre/Salford Quays, will continue to limit demand for offices in Warrington Borough, particularly in the weakened office market of 2020/2021.
- ix) Sites in neighbouring local authority areas, even when of a strategic scale, will ultimately meet the OAN of those authorities rather than Warrington. The only exception is the proposed 31.22 ha Omega South Western Extension which is identified to meet cross boundary requirements as agreed between St Helens and Warrington through the 'Duty to Cooperate'.

Present Employment Land Supply

- x) In 2019, Warrington had a realistic employment land supply of 104.53 ha in 14 sites, of which 34.85 ha in 11 sites represented the local supply and just over two thirds, 69.68 ha in three sites, represented the strategic (Omega) supply.

- xi) Since 2016, that supply has reduced by nearly two thirds, reflecting the extensive take up of land at Omega, plus some losses to other uses. The new, March 2021, realistic land supply is 38.87 ha in nine sites. Of this, 26.17 ha in eight sites is the local supply.

Objectively Assessed Needs

- xii) To assess needs two recognised methods of forecasting have been used creating four distinct models of OAN, plus two 'Policy On' Sensitivity Tests. 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

- xiii) 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 316.26 ha of land on a strategic/local take up model, 189.84 ha on the local only model. This is inclusive of a three-year buffer and an allowance of 17.64 ha for business displacement associated with Town Centre projects (see Section 4.0 of the Main Report). Against the realistic land supply of Warrington, there are shortfalls of 163.67-277.39 ha.

Labour Demand

- xiv) The second method looks at jobs growth, as identified in Oxford Economics and Cambridge Econometrics forecast modelling, an updated (2021) model which allows for macro-economic changes since 2019. As can be seen in Table ES1, the resulting jobs based forecast model suggests the Borough has much smaller land shortfalls.
- xv) The Oxford and Cambridge Forecasts represent two realistic projections for how jobs might change in Warrington to 2037, reflecting factors such as the economic impacts of Covid-19 and the Christmas 2020 Brexit Deal, as they were understood in early 2021. However, to also consider some more optimistic scenarios for jobs growth, this study has also undertaken Sensitivity Testing relating to the SEP although this strategy is now of reduced significance in the present economic and policy climate (see Table ES1).

Table ES1 – Warrington Borough Land Forecast Models – Summary

Model	Need (A+B+C)			Less Supply (D)	A+B+C-D=Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Oxford Modelling = Further 45.20 ha of land need	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Cambridge Modelling = Further 44.95 ha of land need.	Assumptions
	A: Land Need 2021-2038, ha	B: Buffer (three years further need) ha	C: Allowance for business displacement associated with Warrington Town Centre Development projects	D: Land Stock 2021, ha – Strategic and/or Local Supply*				
Strategic/ Local Take Up	255.96	42.66	17.64	38.87 Strategic/ local supply	(277.39)	-	-	Based on historic (24 years) take-up of 14.22 ha/pa. Inclusive of seven years take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture SEP figure not applicable to take-up scenarios Of this, strategic need would be approx. 117.94 ha.
Local Take Up	147.60	24.60	17.64	26.17 Local supply	(163.67)	-	-	Based on historic (21 years) take-up of 8.20 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture SEP figures not applicable to take-up scenarios
Employment based on adjusted stock – Oxford Economics Model	+38.24 Growth +12.88 Change	+6.36 +2.16	17.64	26.17 Local supply	1)(36.07) 2) (6.51)	1) (81.27) 2) (51.71)	-	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	+36.42 Growth +23.53 Change	+6.06 +3.96	17.64	26.17 Local supply	1)(33.95) 2) (18.96)	-	1) (78.90) 2) (63.91)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore, 2021

*Realistic land supply at March 2021.

- xvi) In terms of jobs projections, the baseline Forecasts remain the more accurate as they are most up to date and allow for contemporary economic issues such as Brexit and the Covid-19 Pandemic. These forecasts give net needs of 15.04-27.49 ha and 42.48-44.60 ha on a growth only scenario. Taking a midpoint between the two would give needs of 21-43.50 ha.
- xvii) However, the market assessment, the impacts of the Covid-19 Pandemic on jobs densities and a review of the historic trends in employment change and land take up (see Section 7.0 of the Main Report) 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.**

Meeting Needs

- xviii) Against identified OAN needs of 277.39 ha to 2038, landowners, developers and their agents made Call for Sites submissions and updated proposals which, as of April 2021, would provide 762.98 ha of potential land (using net figures or the specific B-Class allowances in mixed-use options, where these are given). This Study has analysed these sites and graded them A+ to E.
- xix) Ultimately, 484.78 ha of supply is potentially available in the Call for Sites options graded A+ to B-, sufficient to meet projected OAN. This land can be split into seven identifiable supply options for meeting needs, noted below.

Recommendations

- xx) 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 277.39 ha, to 2038
 - The supply options to meet this need are:
 - Land at Bradley Hall Farm, Cliff Road - Six56 (Phase I) – 92.00 ha (gross)
 - Land around Barleycastle Lane, Barleycastle (Six sites) – 44.92 ha (gross)
 - Six56 Phase II – 70.00 ha (gross)

- Fiddlers Ferry – 101.0 ha (gross)
 - Port Warrington – 60.00 ha
 - St Modwen – Rixton Scheme – 47 ha (net)
 - Land at Arpley Meadows, Eastford Road – Warrington Commercial Park – 33.00 ha.
- Also, the inclusion of a maximum amount of land from an Omega South West Extension, in St Helens Borough. The Council will need to take these options into account as part of its wider planning assessment
 - Review and monitor the employment land and premises position and undertake the study again in about five years
 - The Council should continue to work with neighbouring authorities on issues in which interests will overlap.

1.0 INTRODUCTION

- 1.1 This report provides an Economic Development (employment land) Needs Assessment for Warrington Borough. It was carried out on behalf of Warrington Borough Council (the Council).
- 1.2 BE Group, Warrington-based economic development and property consultants, compiled this report during February-April 2021. BE Group was supported by economic development consultancy Mickledore.
- 1.3 The study was commissioned to provide an up to date and proportionate 'refresh' of the Council's Economic Development Needs Assessment (EDNA), produced in 2019 by BE Group and Mickledore. The reasons for this update include:
- To support development of the Proposed Submission Version Local Plan (PSVLP)
 - To reflect a revised local plan period, 2021-2038, compared to the previously used 2017-2037
 - To reflect changes to national planning policy and guidance – National Planning Policy Framework, National Planning Policy Guidance and Use Class Order Changes
 - To reflect national issues including the exit of the United Kingdom from the European Union and the potential impacts of the Covid-19 Pandemic
 - The fact that Fiddlers Ferry Power Station will now likely become available for employment development within the Plan period, and that the site is now being actively promoted for inclusion as such in the Local Plan by the owners
 - To ensure the Borough's economic development needs are considered in the context of the Borough's housing needs in order to provide a balanced Local Plan spatial strategy.
- 1.4 Reflecting the Study Brief, the Refresh to the Warrington EDNA will:
- *"Task 1: The key output will be a proportionate 'refresh' of the Council's EDNA (2019) and the data and recommendations made within it. This should specifically include defining the current available realistic employment land supply and defining the*

Objectively Assessed Need model and figure.

- *Task 2:*
 - *Owing to the passage of time and a change in circumstances, in addition to Task 1, the EDNA should also include an analysis of the potential impacts of changes to 1987 Use Classes Order in relation to the provision of B1 floor space within the Borough, given the creation of the new E Use Class in 2020.*
 - *Additionally, an assessment and consideration of how Warrington's strategic employment provision fits within the wider North West context will also be needed.*
- *Task 3: Undertake a review of the site selection methodology/grading used to assess the 52 Regulation 18 sites submitted to the Council previously and assessed as part of the 2019 EDNA, to ensure the conclusions and grading remain valid in light of changes to national planning policy and guidance*
- *Task 4: Undertake a review and grading for the additional site of Fiddlers Ferry Power Station in line with the methodology used to complete Task 2.*
- *Task 5: The provision of a consolidated refreshed EDNA study including tasks one and two as set out above, and the provision of a consolidated stand-alone site assessment report including tasks three and four as set out above."*

1.5 It should be noted that this study was completed during the Covid-19 Pandemic. This may influence the views of some stakeholders regarding future demand for land and property, although BE Group has encouraged all parties to think long term, beyond the lockdown and the short-term economic impacts resulting from it. Where possible, research has considered what the longer term impacts of the Covid-19 Pandemic might be on the local demand for land and property.

Background

1.6 In April 2019, the Council published its PSVLP for consultation. Over 3,000 responses were received to the proposed Plan with the largest number coming from residents objecting to the scale of proposed Green Belt release.

1.7 A large number of representations were also received questioning the Council's employment land allocations for large scale B8 use class developments, given the low number of jobs generated from this type of use, and the perceived low skilled jobs that

would be created. The method used to calculate employment land requirements over the Plan period, derived from the EDNA (2016) and the EDNA (2019), was also questioned.

- 1.8 The 2019 EDNA Study concluded that there was a requirement for 362 ha of employment land to 2037 across the Borough to meet both local and strategic employment needs. The recommendations made in the 2019 EDNA, including the site assessment outcomes for sites submitted to the Council at the Regulation 18 Plan stage, went on to inform the relevant policies and employment land allocations within the PSVLP.
- 1.9 Reflecting the stakeholder comments made in the 2019 consultation, and the contemporary issues identified in paragraph 1.3 above, the Council intends to review the spatial strategy and site allocations set out in the PSVLP, alongside the wider evidence base which supports it, including the EDNAs. The Local Plan Period will also be amended.
- 1.10 Following on from the Plan and evidence base review, the Council envisages a further stage of Regulation 19 consultation on revisions to the Local Plan in September 2021, prior to submitting the plan for examination by February 2022.

Methodology

- 1.11 Research methods used include e-meeting and telephone interviews with property market stakeholders such as developers, investors and their agents, reflecting the latest guidance on social distancing in the Covid-19 Pandemic. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken, to ensure conformity with strategic policy.
- 1.12 The Wider Economic Geography of Warrington is identified and the property market in the local authority areas within that area of economic influence 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, including Regulation 18 site submissions, has been assessed against up to date forecast data, accounting for the latest macro-economic trends, 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 A key reason for undertaking the updated EDNA is to take account of updated Planning Practice Guidance (PPG), which provides guidance on how local authorities should approach both housing and employment land reviews. Two guidance notes were produced in 2014 and updated over 2018/19 – *Housing and Economic Land Availability Assessment* which provides a methodology of reviewing suitable land, and *Housing and Economic Needs Assessments*, which provides guidance on how future needs can be determined. A third PPG *Effective Use of Land* provides advice on assessing whether existing employment allocations should be protected or reallocated for a more deliverable use.
- 1.16 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 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). Identification methods may include a public ‘Call for Sites’ exercised by the local authority. 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 best fit functional economic market area*
- *The existing stock of land within the area - this will indicate a baseline for land in employment uses*
- *The recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or loss to permitted development)*
- *Market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business*
- *Market signals – based on projected growth in the certain markets and demographic changes and*
- *Oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.”*
- When considering whether there is a realistic prospect of an existing employment site being developed for its intended use, PPG *Effective Use of Land* suggests that the following factors be taken into account:
 - *“The length of time since the site was allocated in the development plan*
 - *The planning history of the site including any planning applications or pre-application enquiries;*
 - *Whether there is evidence that the site has been actively marketed for its intended use for a reasonable period, and at a realistic price; and*
 - *Whether there are any changes of circumstance that mean that take-up of the site for its intended use is now unlikely.*
- *Where an alternative use for the allocated site is proposed, it will also be relevant to consider the extent to which evidence suggests the alternative use would address an unmet need, as well as the implications for the wider planning strategy for the area and other development plan policies.”*
- **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.”*

This is combined with *“consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.”*

The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the Borough’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 EDNA is prepared in line with this advice.

1.17 Table 1 shows how the EDNA 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	
Determine assessment area and site size	Undertaken by Warrington Borough Council
Desktop review of existing information	Review of the policy position, socio-economic position, local/sub-regional property market and the 2021 land supply (Covered in Sections 2, 3, 4, 5)
Call for sites / broad locations	Regulation 18/Call for Sites exercises completed internally by Warrington Borough Council. Relevant sites reviewed in separate document.
Site / broad location survey	Review of available employment sites. Broad locations to meet future land needs completed in Conclusions and Recommendations. (Covered in Sections 4,7,8 Appendices and Regulation 18 Sites Review)
Stage 2 – Site / Broad Location Assessment	

Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Section 4, Appendices and Regulation 18 Sites Review
Overcoming constraints	Covered in Section 4, Appendices and Regulation 18 Sites Review
Stage 3 – Windfall Assessment	
Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 6
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	EDNA produced by BE Group/Mickledore and monitoring undertaken by Warrington Borough Council

Source: BE Group, 2021

2.0 STRATEGIC CONTEXT UPDATE

Introduction

- 2.1 This section focuses on national, sub-regional and local reports and strategies that have a relevance to the allocation of employment land and premises. It updates and reviews the policy position from the 2019 EDNA Update and shows how that study, and this Update, conform to national and strategic policy and have influenced local policy.

National Policy

National Planning Policy Framework (NPPF), 2019

- 2.2 The framework set out planning policies for England, as made by the Government, and the ways in which they can be applied. The introduction stated that it “provides a framework within which locally-prepared plans for housing and other development can be produced.” The NPPF must be taken into account when developing local authority development plans and remains a material consideration in planning decisions.
- 2.3 In terms of Local Plans, the NPPF recommended plan reviews be completed no later than five years after adoption (Para 33) and required Local Planning Authorities to prepare a statement of common ground with neighbouring authorities (Para 27).
- 2.4 Key for employment, and other sites, was Chapter 11 on making ‘Effective Use of Land.’ Para 120 encouraged reallocating land where there is no reasonable prospect of an application coming forward for the allocated use, specifically Local Planning Authorities should:
- a) *as part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped); and*
 - b) *in the interim, prior to updating the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area.”*
- 2.5 *“Local planning authorities should also take a positive approach to applications for*

alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should support proposals to ... use retail and employment land for homes in areas of high housing demand, provided this would not undermine key economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework.” (Para 121).

- 2.6 Additionally, planning policy should “*promote and support the development of under-utilised land and buildings, especially if this would help to meet identified needs for housing where land supply is constrained and available sites could be used more effectively (for example converting space above shops, and building on or above service yards, car parks, lock-ups and railway infrastructure)*” (Para 118).

National Planning Policy Framework (NPPF) Consultation Proposals

- 2.7 A consultation for an updated NPPF was completed over Jan-March 2021. It proposed draft amendments to implement policy changes in response to the Building Better Building Beautiful Commission “Living with Beauty” report. Most of the proposed changes related to policy on the quality of design of new development.
- 2.8 With regards to Chapter 11: Making Effective Use of Land, the only amendment proposed was to emphasise the role that area-based character assessments, codes and masterplans can play in helping to ensure that land is used efficiently while also creating beautiful and sustainable places.

Use Class Order Amendments, September 2020

- 2.9 As of September 2020, adjustments have been made to the Use Classes Order which mean that Use Classes A1, A2, A3 and B1 are now to be treated as Class E. The B1 class has been changed to E(g) and defined as “ [Employment] *Uses which can be carried out in a residential area without detriment to its amenity.*” E(g) is further separated into three sub-categories which reflect the previous a, b, c division of the B1 Use Class:
- E(g)(i): Offices to carry out any operational or administrative functions (former B1(a))
 - E(g)(ii): Research and development of products or processes (former B1(b))
 - E(g)(iii): Industrial processes. (former B1(c)).

- 2.10 Class D has also been redefined to newly introduced Classes E and F, with Class F comprising of Local Community and Learning premises. D1 is split out and replaced by the new Classes E(e-f) and F1. D2 is split out and replaced by the new Classes E(d) and F2(c-d) as well as several newly defined 'Sui Generis' uses, including:
- Pubs, wine bars and other drinking establishments (including those with expanded food provision)
 - Hot food takeaways
 - Live music venues
 - Cinemas, concert halls, bingo halls and dance halls.
- 2.11 The residential (C classes), general industrial (B2) and storage and distribution (B8) use classes remain unchanged.
- 2.12 The E Class brackets together a wide variety of uses, all of which are now considered to be in the same use class:
- Retail
 - Restaurants
 - Financial, professional or other commercial services
 - Publicly accessible indoor sport, recreation or fitness
 - Publicly available medical or health services
 - Crèches, day nurseries and day centres
 - Offices, including research and development
 - Industrial uses which do not harm amenity.
- 2.13 Planning permission is not required for changes of use within the same use class. This means that many types of business user will be able to change the uses of properties without seeking planning permission. For example, under the new rules, a shop will be able to change to an office and then to a gym and back again, without planning permission.
- 2.14 In order to change the uses within a class, there must have been actual and lawful use (i.e. if the building is not being used or occupied for the use permitted under an existing

- planning permission, it will need to be brought into that use before it can then change to another use within Class E).
- 2.15 The government has said that the main driver of the changes has been the need to enable a repurposing of buildings on high streets and town centres. The new Class E allows for a mix of uses to reflect changing retail requirements. It will allow a building to be used flexibly by having a number of uses taking place concurrently or by allowing different uses to take place at different times of the day. The aim is for this to support the high street revival and allow greater flexibility to change uses within town centres without the need for planning permission.
- 2.16 From 1st September 2020 to 31st July 2021, permitted development rights enabling a change of use will continue to be applied based on the existing use classes, as they existed on 31st August 2020. After July, the new use classes will apply.
- 2.17 The Government has also implemented separate changes to permitted development rights. These include allowing the demolition and rebuilding of vacant and redundant office and light industrial buildings into dwellings, without planning permission.
- 2.18 To implement this will require that prior approval from the local authority prior to commencement of the development. This includes approval in respect of traffic and highway matters, air traffic and defence asset impacts, contamination risks, flood risk, the external appearance of the building, the provision of adequate natural light in all habitable rooms of the new dwellings, impact on amenity of the existing building and neighbouring premises including overlooking, privacy and loss of light, and the impact on any protected views.
- 2.19 For Warrington Borough, the practical affects are likely to include:
- In principle, the changes make it easier to convert town centre offices to other 'E-Class' uses. In practice, many of the older offices in Warrington Town Centre, which could be converted to other uses have already been converted under pre-existing Permitted Development powers. In other cases, proposals are for redevelopment, not conversion of existing properties, which still requires planning consent. Additionally, as is discussed in Section 3.0 there is now an increased

market interest in delivering new offices in Warrington Town Centre, which will partly replace those lost to conversion/redevelopment

- This new flexibility has no spatial considerations and therefore will apply outside of town centres as well. It thus has the potential to result in the introduction of non-office type activities, including retail, in out of centre business parks, which runs contrary to national and local planning policies designed to protect town centre retail. In Birchwood, there is some risk that older stock might be converted to other uses, particularly where it links well to main roads and local residential areas. However, the ongoing success of Birchwood as a major out of town office and industrial park makes mass conversions unlikely.
- The biggest impacts are likely to be in Warrington's smaller industrial estates where the new Use Class/Permitted Development Rights would make the conversion of light industrial stock to retail and leisure/community uses easier. However, this only accelerates existing trends which have seen some older properties converted to such uses in prominent locations such as along the A49 Winwick Road. Such changes are not necessarily unwelcome as they bring stock which no longer meets business needs back into productive use, generate a more diverse offer in Warrington, and may even support existing regeneration plans in areas such as the Southern Gateway. Again, where proposals are for redevelopment rather than changing the use of existing buildings, a planning consent is still needed.

2.20 In all these cases it is worth noting that, in the short term at least, the retail and leisure market has been greatly weakened by the Covid-19 and the resulting lockdowns and closures of retail/leisure businesses. Demand for new retail units, delivered via new build or conversions is likely to be modest for some years. Indeed, one trend noted in Section 3.0 is that previously high street focused retail businesses are now investing in smaller B8 units locally to support a move to partly or wholly online trading.

2.21 There will also be policy impacts as Local Plan policies which seek to protect specific uses in the town centre, or office space within designated areas, will no longer be enforceable.

2.22 Landlords will also need to be particularly aware of the new arrangements when looking at leases and the extent of use that is authorised. Allowing too broad a permitted use could now result in undesirable changes of use within the scope of the lease, and landlords will

not be able to fall back on the planning system to prevent such changes.

- 2.23 The changes will also have an impact on property valuation. For example, a property which had achieved a desirable change of use may now find that any such extant permission is unnecessary and does not result in an uplift in value. Similarly, there is likely to be a levelling-out of values for properties within the new use class, given the interchangeability of uses therein.

Sub-Regional Policy

- 2.24 It should be noted that at the time of producing this Study, development of the Cheshire and Warrington Local Enterprise Partnership (LEP) Local Industrial Strategy was on indefinite hold, with no publicly available draft reports.

“Cheshire and Warrington Matters”: Cheshire & Warrington LEP – Strategic Economic Plan (SEP) (Second Edition 2018)

- 2.25 The vision of the revised SEP was shared across Cheshire and Warrington *“to grow our economy’s GVA £50 billion per annum by 2040”*.
- 2.26 By 2040 Cheshire and Warrington will be: *“An economy of £50 billion, be 20 percent more productive per person than the UK average, create 120,000 net additional jobs and build 127,000 new homes”*.
- 2.27 Building upon the Cheshire and Warrington LEP’s investment proposal for the Local Growth Fund, £200m is now being used *“to support a range of infrastructure, skills and innovation projects, unlocking a further £380 million of public and private investment over the next 10 years”*.
- 2.28 A number of key sector strengths will help to provide the core to future growth within Cheshire and Warrington:
- Manufacturing
 - Life Sciences
 - Energy and Environment
 - Chemicals
 - Finance & Business Services

- Logistics and Distribution.

2.29 Within these broad sectors, Warrington is identified to have strengths in:

- Business administration and support services
- Mining, quarrying and utilities (primarily utilities)
- Transport and storage.

2.30 To help achieve these goals, The SEP has defined certain key areas where growth will be focused upon (see Table 2).

2.31 The Atlantic Gateway is privately sector-led and contains the key project of Port Warrington. The LEP will be in support of the Atlantic Gateway ambitions where they align with the spatial priorities noted above.

Table 2 – Growth Areas of Focus

Priority	Outputs	Comments
Cheshire Science Corridor/ Enterprise Zone – To be an internationally renowned science and technology cluster	<p><i>Original Proposal:</i> 100 ha to attract 500 businesses and create almost 20,000 jobs between 2015-2040</p> <p><i>To Date:</i> 20 new companies have entered the area delivering 330 new jobs and £1 million of investment</p>	<p>Includes: <i>Birchwood Park</i> Location of science and engineering businesses, with recognition as being one of the most successful centres for Nuclear Services in the UK</p> <p><i>Sci-Tech, Daresbury, EZ</i> Home to the Science and Technology Funding Council facility which is about to benefit from £300 million of investment in supercomputing</p>
Mersey Dee Economic Axis – Linking the Northern Powerhouse and North Wales, particularly in businesses within the energy sector, advanced manufacturing and high-tech engineering	<p>Generating £22 billion of GVA per year</p> <p>Providing 380,000 jobs from 27,000 companies</p> <p>A Growth Prospectus for the area was launched in spring 2017 highlighting some of the strengths of the area and the key opportunities for development.</p>	<p>Cheshire and Warrington to work with neighbouring authorities to develop this ‘hidden gem’ so that it may act as the Western representative and driver of the Northern Gateway</p>
Constellation Partnership – To create a new city which capitalises upon the arrival of HS2 and therefore	<p>Potential to deliver 100,000 jobs and over 100,000 homes</p>	<p>Continued work with Stoke-on-Trent and Staffordshire SEP and local authorities to develop and implement a strategy for growth for the area in line with the Constellation Partnership. Work is hoping to be completed in Summer 2017 (Outcomes to be seen in next refresh of the SEP)</p>

Priority	Outputs	Comments
the enhanced connectivity		
Warrington New City – Creation through completing the Warrington New Town and investing in transport and community infrastructure (Further discussed in 'Warrington Means Business' below)	By 2040: 27,000+ new homes 31,000 jobs By 2020: 3,500 new homes, 1,000 affordable homes	Proposals for: <ul style="list-style-type: none"> • A New City at the heart of the Northern Powerhouse • A City-wide green network • A ribbon of Blue – promoting the waterfront of the city • A new central city • New garden suburbs and houses for all • Stronger and healthier neighbourhoods • Sustainable transportation and connectivity • Accessible Business and Employment Areas – jobs close to where people live and transportation links • A low carbon city • A smart technology city

Source: Cheshire and Warrington LEP, 2017

- 2.32 Key within these projects is clearly the Warrington New City programme which forms the Council's growth aspirations for completion of the Warrington New Town. To the above figures the Warrington Means Business programme (discussed below) indicates that *"in Warrington's immediate economic gravity (SciTech Daresbury, Sandymoor, Parkside, Carrington) the following additional homes and jobs will be enabled by 2040:*
- *At least 15,000 new homes*
 - *54,000 jobs."*

Local Policy

- 2.33 Warrington Borough Council is in the process of progressing a second iteration of its Draft Local Plan for consultation. The initial Draft Local Plan was consulted upon in 2019 and all the responses received from this consultation have now been reviewed. However, Local Plan process has been delayed in response to the impact of COVID-19, along with the Government's proposed planning reforms and new housing calculation methodology.
- 2.34 The Council believe they will be in a position to progress with the Local Plan in the summer of 2021.

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

- 2.35 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."*
- 2.36 Policy CS2 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."*
- 2.37 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."*
- 2.38 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."*
- 2.39 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.

- 2.40 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.
- 2.41 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.*
- 2.42 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.”*
- 2.43 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.*”
- 2.44 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.”*

2.45 Longer term development opportunities may also be considered at:

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

2.46 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.

2.47 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.

Economic Development Needs Assessments, 2016 and 2019

2.48 Core Strategy assessments of need were updated by the 2016 an economic development (employment land) needs assessment (EDNA), completed by BE Group and Mickledore. This identified an OAN, to 2037, of 380.90 ha (276.37 ha less supply than available, 104.53 ha focused at Omega) based on a forward projection of historic land take-up trends. New allocations of employment land were recommended to be focused in East Warrington, the M62 Corridor, Warrington Town Centre, Port Warrington and the M56 Corridor area at Barleycastle. Generally, there is a strong ongoing demand for industrial/warehouse space, including strategic options, along with more modest office needs. This work informed Local Plan sites assessments and decision making.

- 2.49 In 2019, BE Group and Mickledore updated the 2016 Study, using a comparable methodology. This identified an OAN, to 2037, of 361.71 ha to 2037, again based on past take up trends, incorporating a five-year buffer and an allowance for employment land losses to masterplanned redevelopment in, and south of, Warrington Town Centre. The net requirement, above current supply levels at that time was 277.80 ha. Future supply options could include land at Fiddlers Ferry, and it was recommended that the Council keep monitoring the location, throughout the Local Plan Period to identify any available land, if and when it comes forward.

Neighbourhood Policy

Appleton Parish Thorn Ward Neighbourhood Development Plan to 2027 (Amended Version, May 2017)

- 2.50 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 proposed modifications stage. The designated area covers 601 ha, 46.4 percent of the Appleton Parish.
- 2.51 Policy AT-E1 (New Local Employment Opportunities) indicates that new development should:
- “(a) Give priority to the conversion of an existing building where this option exists*
 - (b) Are of a scale appropriate to the area*
 - (c) Do not have a detrimental impact on surrounding residential character and amenity*
 - (d) Do not lead to the loss of open space or green infrastructure*
 - (e) Have a good connection to the highway network and are acceptable in terms of highway safety and parking provision.”*
- 2.52 The preferred locations for employment development are Appleton and Stretton Trading Estates.

Summary

- 2.53 Priorities in national planning policy are, and are expected to remain:
- Setting a clear target and vision for local economic growth

- Supporting development in sustainable locations to meet the full range of business needs, with policy actions based on a clear and up to date evidence
- Avoiding long term protection of sites/properties not deliverable for B-Class use whilst, conversely, strengthening protection of key employment sites/areas

2.54 In September 2020, changes in the Use Classes Order combined A and B1 uses into a new E- Class Use. Permitted Development rights also now allow the conversion of vacant office and industrial properties to housing. For Warrington Borough, the practical effects of this are likely to include:

- Some conversions of Town Centre office stock are possible, although the outstanding stock which could be converted is now limited, and new build office development is now proposed which, if delivered, would partially replace that lost
- Risk of increased retail/service options in Birchwood, although the office and industrial parks of Birchwood are performing well at present, so are unlikely to see mass conversions
- The biggest impacts are likely to be in the Warrington's smaller industrial estates where the changes would make the conversion of light industrial stock to retail and leisure/community uses easier. However, this only accelerates existing trends which have seen a lot of older properties converted to retail/trade uses as businesses seek more modern accommodation elsewhere. It may even support existing regeneration plans in area such as the Southern Gateway.
- Where proposals are for redevelopment rather than changing the use of existing buildings, a planning consent is still needed.
- In the short term, growth in the local retail and leisure market will be constrained by the Covid-19 Pandemic, indeed a key recent trend is for retail businesses to invest in B8 storage units for greater e-commerce than in new storefront retail space.

2.55 LEP area targets, to 2040, are for: *“An economy of £50 billion, be 20 percent more productive per person than the UK average, create 120,000 net additional jobs and build 127,000 new homes”*. Key will be Warrington New City proposals for 27,000+ new homes and 31,000 jobs, *“completing the Warrington New Town and investing in transport and community infrastructure.”*

- 2.56 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. 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.
- 2.57 Core Strategy assessments of need were updated by the 2016 EDNA study, completed by BE Group and Mickledore. This identified an OAN, to 2037, of 380.90 ha (276.37 ha less supply than available). New allocations of employment land should be focused in East Warrington, the M62 Corridor, Warrington Town Centre, Port Warrington and the M56 Corridor area at Barleycastle. Generally, there is a strong ongoing demand for industrial/warehouse space, including strategic options, along with more modest office needs. This work informed Local Plan sites assessment and decision making.
- 2.58 In 2019, BE Group and Mickledore updated the 2016 Study, using a comparable methodology. This identified an OAN, to 2037, of 361.71 ha to 2037, incorporating a five-year buffer and an allowance for employment land losses to masterplanned redevelopment in, and south of, Warrington Town Centre. The net requirement, above current supply levels at that time was 277.80 ha. Future supply options could include land at Fiddlers Ferry, and it was recommended that the Council keep monitoring the location, throughout the Local Plan Period to identify any available land, if and when it comes forward.

3.0 PROPERTY MARKET ASSESSMENT

Introduction

- 3.1 This section provides a consideration of the demand for land and property in Warrington, updating the same exercise completed for the 2016 EDNA and the 2019 EDNA Update. As in the previous reports, 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 scheme managers, property agents and other stakeholders.

National and Regional Property Markets

- 3.2 Some brief comments on the wider market are first provided below, informed by recent national and regional research. These allow for national market changes and the impact of key events such as Brexit and the Covid-19 pandemic.

Industrial Market

- The national resilience of the industrial sector amid the pandemic has been well-documented and was clearly reflected in the final quarter. Industrial volume surged to a record high of £3.4 billion in Q4 2020, smashing the previous high of £2.3 billion set in Q2 2018.
- The total value of North West industrial transactions during 2020 stood at £695 million, in 62 deals, an increase of a third by value on the £508 million, in 61 deals, transacted in 2019. Investor demand has remained extremely strong, although perhaps lacking significant depth in some sub-sectors. Supply has remained restricted throughout the year. (B8 Real Estate, 2021)
- Demand was driven largely by the buoyant occupational market successes, with an acceleration in the fundamental shift to e-commerce, on-shoring of certain manufacturing process, a shift to greater inventories and the robustness of the industrial market compared to other sectors. (B8 Real Estate, 2021)
- The economic uncertainty surrounding the Covid-19 Pandemic has had a more profound effect on supply rather than demand, particularly in the freehold market. Many property sales, particularly in the first half of 2020, were initially withdrawn from the market or postponed whilst sellers awaited further certainty. The third national lockdown of early 2021 is expected to have still more limited property market effects as the economic impacts of factors such as retail business shutdown are far more clearly understood than was the case in March last year and the vaccine rollout means the end of the pandemic is now in sight. (Knight Frank, 2021)
- Brexit trade negotiations had a more negligible impact on the North West industrial market throughout 2020 than was deserved, being overshadowed by the Covid-19 Pandemic. Some investors and occupiers who have been holding off at the end of last year due to Brexit uncertainty should have greater confidence in 2021, now that there is a deal in place (Knight Frank, 2021)
- 2020 saw the highest proportion of industrial transactions in the North West being for units of 1,500-4,000 sqm, including the letting of units at Birchwood Park
- According to research put together by Colliers International in the first quarter of 2020, prime rents for Grade A units were hitting highs of £6.50 – £6.75/sqft (£70-73/sqm) in Warrington and Manchester and they forecast that rental levels on prime Grade A sites in key locations in the region would achieve £7/sqft (£75/sqm) in the next 12 months.
- Demand for prime sites is driven by investment from large companies in sectors including automotive, food distribution and manufacturing, online retail, medical and pharmaceutical, modular building providers, self-storage specialists, parcel carriers and packaging firms. High rents are attainable in Warrington due to the Borough's position at the centre of the region's communications network and ongoing declines in supply, with the vacancy rates of warehouse premises at 5.48 percent, the lowest ever recorded.(Colliers International, 2021)

Warehouse Market

- The UK logistics market witnessed a record year in 2020. Bolstered by the strongest fourth quarter ever recorded –14.3 million sqft (1.33 million sqm) – annual take-up soared to an all-time high of 50.4 million sqft (4.68 million sqm). The Pandemic and ensuing lockdowns accelerated the shift to online – online sales doubled in the space of 9 months in 2020 when it took 5 years to grow by as much pre-Covid – leading to a surge in demand from ecommerce and Post and Parcel operators that accounted for nearly 40 percent of annual take-up. (Cushman and Wakefield, 2021)
- The warehousing sector has not only been resilient during the pandemic but has arguably benefitted from it. This is reflected in performance. Provisional industrial returns of 6.9 percent in 2020 are in stark contrast with other sectors, a trend forecast to continue in 2021 albeit to a lesser degree. (Lambert Smith Hampton, 2021)
- In the North West, e-commerce/logistics was the dominant sector in the big shed market accounting for 95 percent of all take-up. The Covid-19 crisis has clearly accelerated the expansion of this sector leading to several high-profile occupiers taking additional space in the North West during the second half of 2020, including Dixons Carphone Warehouse, Gousto, AO.com and The Hut Group. (B8 Real Estate, 2021)
- Against demand, in the North West the supply of warehouse space has decreased dramatically in the last 12 months, falling from the peak of 7.26 million sqft (670,000 sqm), in early 2020, to 4.24 million sqft (390,000 sqm) in 22 separate units. Using the five-year average, annual take-up of 3.98 million sqft (370,000 sqm) this equates to just 1.07 years worth of supply in the region. (Savills, 2021)
- Compared to 2019, in the North West, take up of logistics increased by over half whilst supply fell by 29 percent. (Savills, 2021)
- With diminishing levels of existing new build/Grade A stock and a limited future pipeline, the main threat to the North West big box market is the potential supply shortage in next 6 - 12 months. (B8 Real Estate, 2021)
- Demand was for units of 9,000-25,000 sqm. Prime rents were firmly established at £6.75 - £6.95/sqft (£73-75/sqm) in 2020 but with the current demand/ supply dynamics, quoting rents will increase to £7.00 – £7.50/sqft (£75-81/sqm) on new schemes being brought forward during 2021. (B8 Real Estate, 2021)

Office Market

- Many occupiers are now giving thought to what their post-pandemic return to the office looks like, with a greater boardroom acceptance of remote-working expected to see quantity increasingly exchanged for quality in location decision-making. (Lambert Smith Hampton, 2021)
- UK demand for office space remained subdued in 2020 while supply continued to rise in some locations. Take-up rose to 1.4 million sqft (130,000 sqm) in the final quarter of 2020, the highest quarterly total since before the first lockdown in March 2020. However, leasing activity remains well below the five-year quarterly average of 1.9 million sqft (177,000 sqm). Total take-up for the year reached 7.7 million sqft (715,000 sqm), comparable to the period immediately after the Global Financial Crisis. (Cushman and Wakefield, 2021)
- UK office investment turnover rose to £4.2 billion in the final quarter of the year, more than double the previous quarter but still a third below the same quarter last year. The increase in activity signals renewed confidence in the sector after fears over the effects of working from home on occupational demand; many businesses have now indicated that the office remains important despite changing working practices. (Cushman and Wakefield, 2021)
- Uncertainty in the market, around the economic recovery from the pandemic and longer term thinking around the office generally, is expected to fast-track demand for more flexible options. Much of the current supply of serviced offices is, however, not conducive in the current climate, with desks packed into tight spaces and shared environments being shunned by a large proportion of SMEs. (Lambert Smith Hampton, 2021)
- Greater Manchester's office market proved relatively resilient in 2020. Occupiers who had paused their relocation plans in 2020 have had a substantial period to review their occupational requirements against the backdrop of more agile working practices. Many are thus now looking to relocate within the sub-region to larger or smaller premises, as required (CBRE, 2021)
- Before the Covid-19 pandemic hit the UK, Warrington was popular with engineering businesses but that the market experienced a below-par year of take-up in 2019..
- However, at that same time, the Borough's supply of offices had contracted to a low of 46,000 sqm, equating to only 1.4 years of average annual take-up. Grade A supply was limited and due to the lack of new space, many businesses were being forced to consider refurbished grade B space. (Lambert Smith Hampton, 2021)

Local Property Market

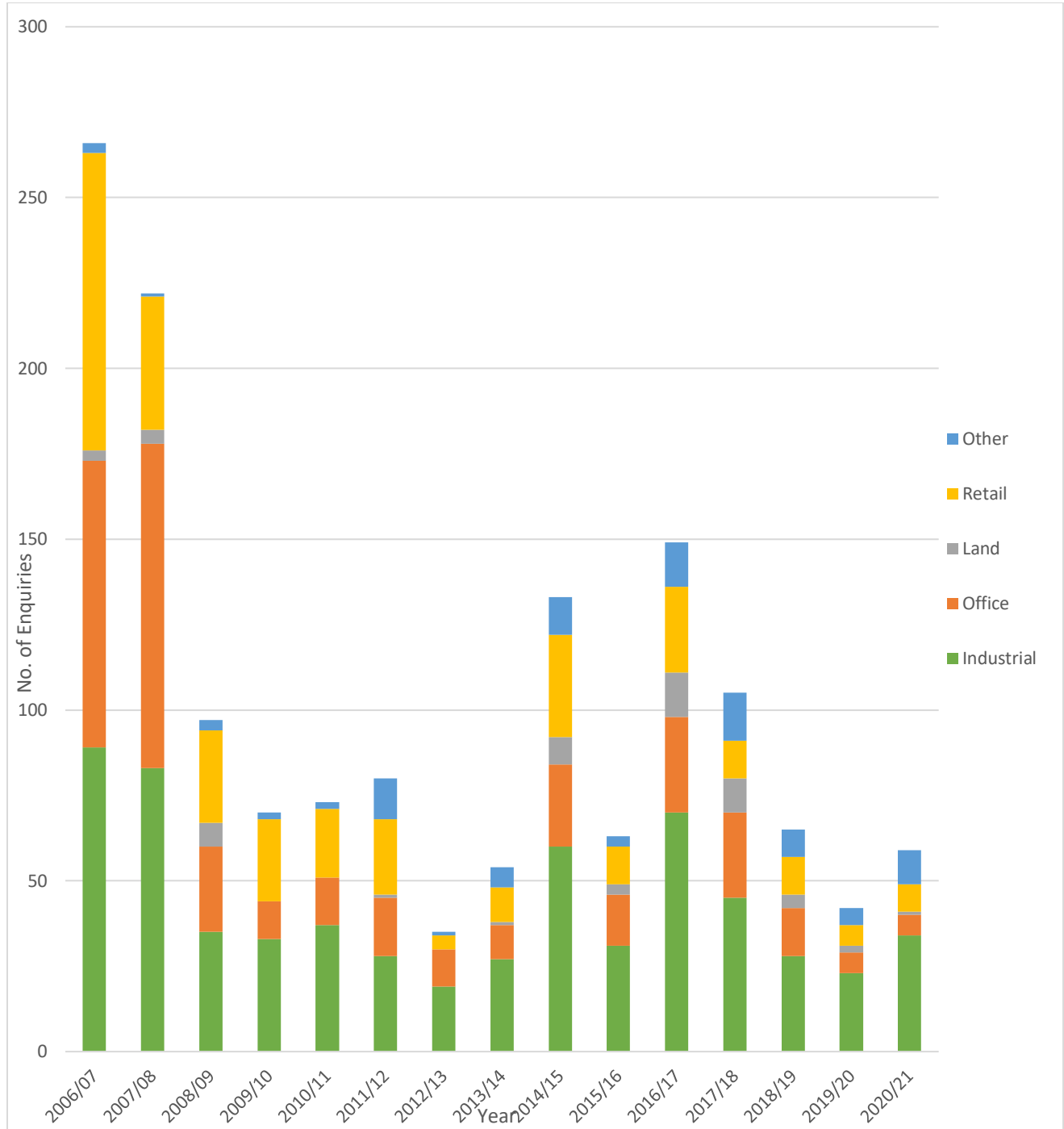
Public Sector Enquiries

- 3.3 Enquiries data has been provided by the Council (Warrington and Co.) from 2006 up to February 2021. This data gives no indication of preferred locations and instead categorises enquiries by property type and by size. It must be highlighted that the data will

include duplication of enquiries where individual companies have indicated a preference for multiple property types. Therefore, this data should be taken as an indicative measure of local demand only.

- 3.4 Additionally, as only a portion of all companies seeking space in Warrington since 2006, will have made enquiries via Warrington and Co. the 1,513 enquiries received represent only a modest sample of the total demand for land and property across the Borough since 2006.
- 3.5 Figure 1 sets out a year by year analysis of enquiries by property type for Warrington between June 2006 and February 2021. Over this period, of the 1,513 enquiries received for the Borough, industrial premises accounted for 42.4 percent. Office enquiries accounted for a quarter of all enquiries since 2006. There were very few land requirements (3.8 percent).
- 3.6 From a peak in 2006/07 of 266 enquiries, enquiries dropped 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 reduced to only 35 in 2012/13. Demand increased after that point, with a peak of 149 in 2016/17. Within the four years of 2014-2018, the total number of enquiries exceeded 100 for three of these years indicating, with some fluctuation, ongoing demand growth.
- 3.7 The last three years have seen a reduction in enquiry numbers, although it is hard to be sure if this indicated reduced demand overall or just reduced use of Warrington and Co's systems to identify available land and premises. It is useful to note that 2020 did not see a noticeable drop in enquiry numbers over 2019, however, with 59 recorded in 2020 against 42 the previous year.

Figure 1 – Council Enquiries 2006-2021, Type

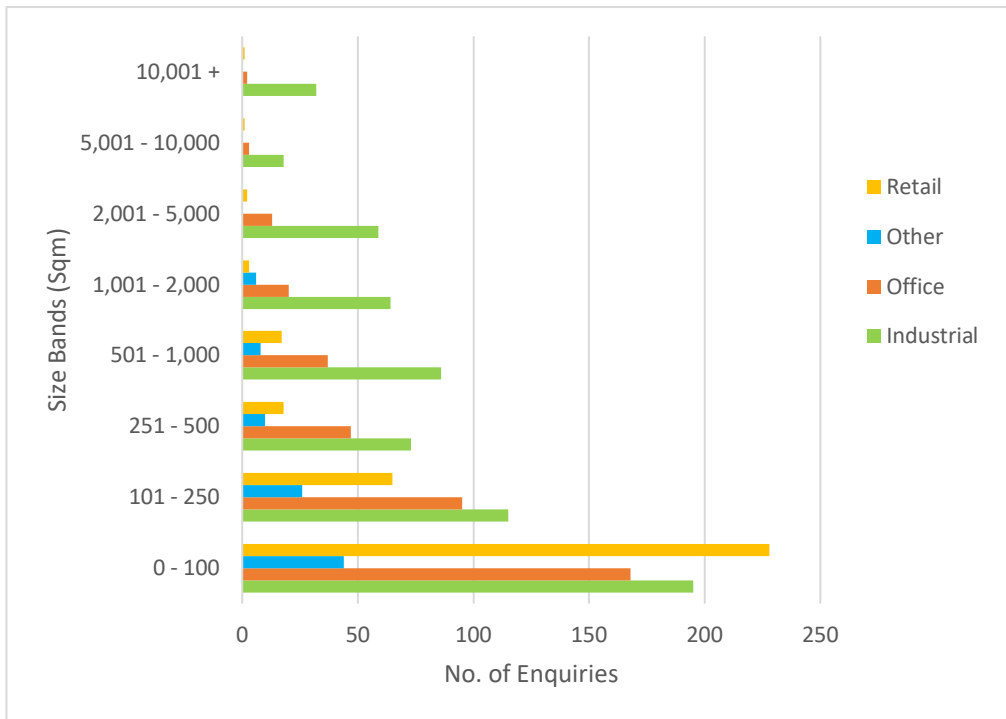


Source: Warrington and Co, 2021

3.8 Figure 2 shows that most enquiries, where a preferred size was stated, were for properties at the smaller end of the scale, and 43.6 percent wanted units of 0-100 sqm. In the industrial sector, almost half of enquiries were for space less than 250 sqm, although there

is reasonable evidence of demand for premises up to 5,000 sqm in size. For offices, the bulk of the demand was for properties of 0-250 sqm, accounting for over two thirds of enquiries. Few enquired about land, but those that did generally sought plots of less than 2.0 ha.

Figure 2 – Council Enquiries 2006-2020, Sizes

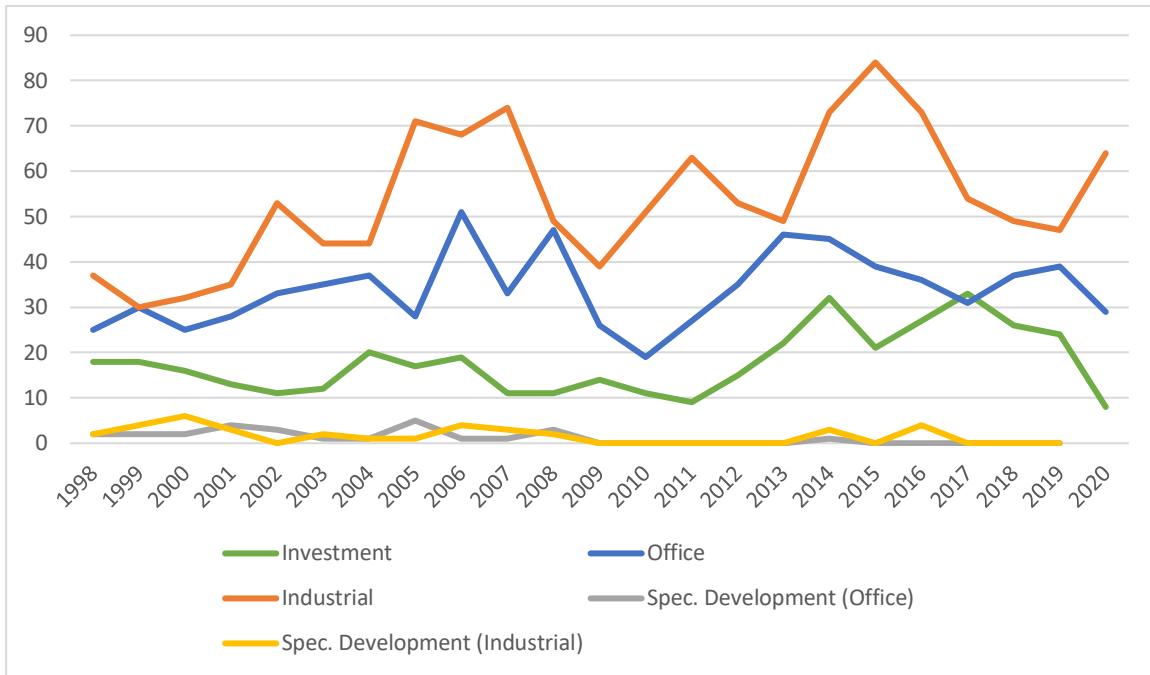


Source: Warrington and Co, 2021

Property Deals

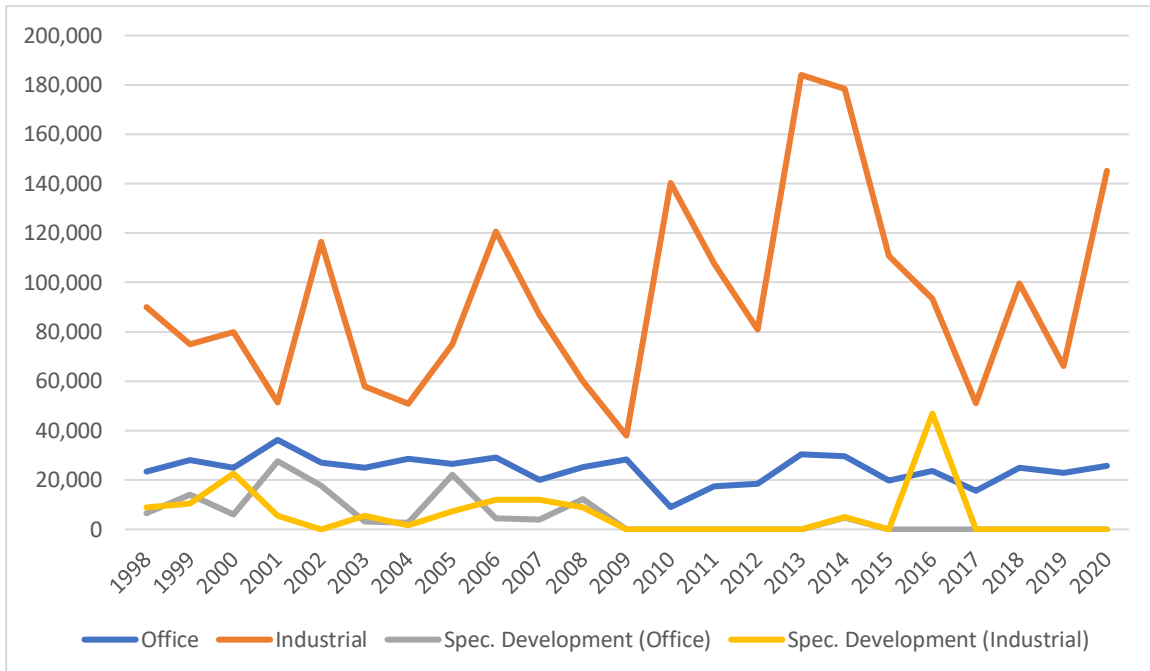
3.9 For the last 23 years, since 1998, BE Group has researched and written an annual review of Warrington’s economy and property market. This covers investment, industrial, office, retail and residential markets. It records office, industrial and investment deals, of more than 200 sqm, completed in the preceding year. Figure 3 summarises that transaction information, from 1998 to 2020, with data for the latter year being recorded in the 2021 Property Review. Figure 4 shows the amount of floorspace being transacted annually, over the same period.

Figure 3 – Number of Deals by Property Type, 1998-2020



Source: BE Group, 2021

Figure 4 – Floorspace Transacted, 1998-2020

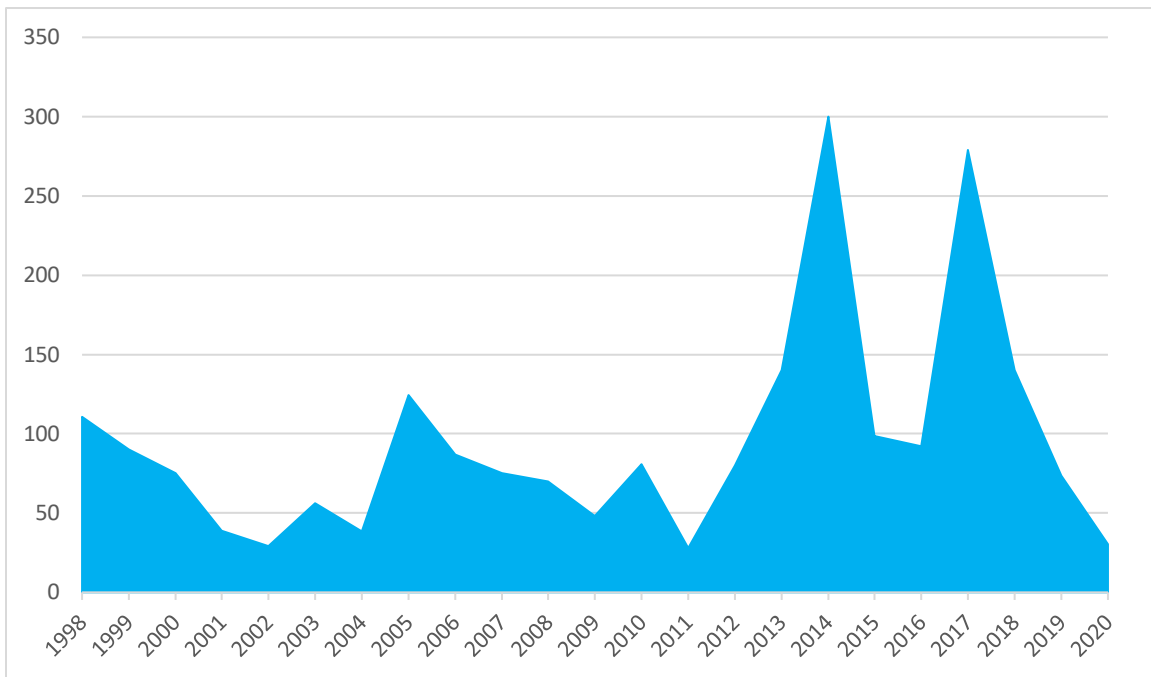


Source: BE Group, 2021

Investment Deals

3.10 There has been a total of 408 investment deals over 1998-2020 in Warrington property, representing £2.2 billion of investment value. Figure 5 shows the levels of value achieved on investment deals, annually. Over that 23-year period, an average of 18 deals were recorded each year, with an average annual investment total value of £97 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 5 – Value of Investment Deals, 1998-2020



Source: BE Group, 2021

3.11 Since 2012, Warrington's investment market has recovered well, with a peak of 32 deals recorded in 2014, generating £300 million in investment value, where market activity in that year included the sale of the Golden Square Shopping Centre, for around £141 million, and the sale of Birchwood Park. 2017 saw another peak in investment, with 33 deals generating £279 million – with this figure including the resale of Birchwood Park, this time to the Council. Annually, most of the transactions related to either office or industrial property investments, although 2014/15 saw strong investment in logistics property, reflecting the trend nationwide. 2019 saw £73 million in investment, above average, but in

2020, that has more than halved to £33 million, one indication of how the 2020 Covid-19 Pandemic has impacted on the local property market.

Industrial Deals

- 3.12 There has been a total of 1,236 industrial deals over 1998-2020, greater than 200 sqm each, occupying 2.16 million sqm of space. The average annual transaction rate was 54 deals/year, taking up an average of 93,918 sqm of floorspace each year. On average 15-25 percent of deals were freehold. Deal rates have fluctuated over the 23-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 2008-2013 national recession was relatively modest.
- 3.13 Whereas 2015 saw a peak in industrial deals and 2013 saw the greatest floorspace take-up, 2016 and 2017 saw sharp declines in terms of both number of deals and total floorspace transacted and indeed the rate of floorspace take-up in 2017 had not been as low since 2004. Again, this was felt to be firstly a measure of the local lack of industrial floorspace, rather than evidence of a significant drop in demand. Furthermore, totals for the years 2013-2015 were inflated by strategic deals at Omega. 2016/17 activity was more strongly local in scope. The number of deals in the years following 2017 remained modest. However, in 2020 the total floorspace transacted increased to 145,300 sqm, 120 percent higher than the total from the year before and the highest since 2014. Again, some of this reflects take up at Omega, but it is still evidence of how well local market activity has held up, and even improved, during the Covid-19 Pandemic.

Office Deals

- 3.14 There has been a total of 781 office property deals since 1998, greater than 200 sqm in size each, comprising 559,931 sqm of space. An average of 34 deals, in around 24,300 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.
- 3.15 Market activity decreased in the recessionary years 2009-2012, before recovering well, with the number of deals in 2013/14 approaching pre-recession peaks. Deals since that time have reduced and 2017 saw the lowest office total floorspace take-up seen since 2010. This was felt to be partly due to reducing levels of good quality stock and a lack of

freehold space available, rather than a lack of demand. Since 2017, the number of deals did show signs of returning to the levels seen pre-recession and in 2013/14, however, events in 2020 appear to have stunted this progress. In 2020 there were just 29 deals completed, a nine-year low. Those 29 deals accounted for 25,782 sqm of floorspace, the highest amount of floorspace transacted since 2014, although half of this comprised just two exceptional deals – 1 Time Square (7,636 sqm) and Stanford House, Birchwood (5,090 sqm), Council sales/lets. Without these the floorspace transacted drops to 12,499 sqm, the lowest level since 2010, when 9,031 sqm was transacted, and the second lowest level overall in the 1998-2020 period.

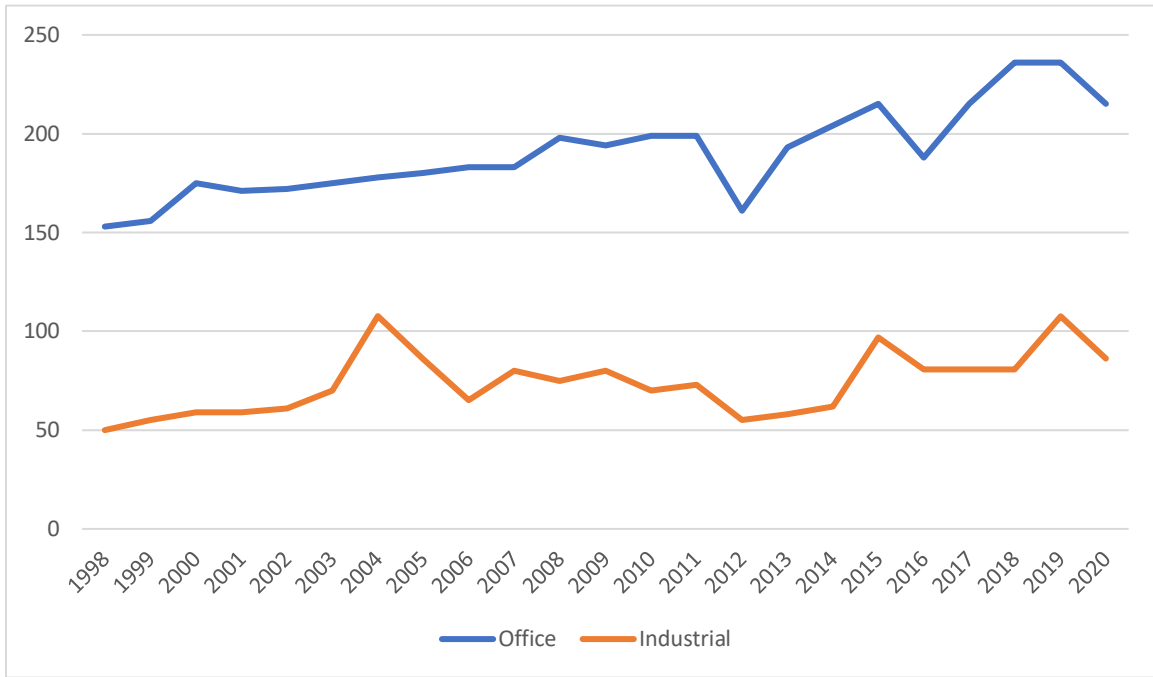
Speculative Deals

- 3.16 Since 2008, speculative activity for both office and industrial property has been largely non-existent with the exception of four deals in both 2014 and 2016. In early 2016 there was the completion of The Base office scheme in Warrington Town Centre and over 2016-2020 some speculative delivery of industrial/warehouse units at Birchwood Park.

Headline Rents

- 3.17 Figure 6 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 (£14/sqft), to 2010/11 when £199/sqm (£18/sqft) was achieved. This represents an annual growth rate of some 2.3 percent. 2012 saw headline rates decrease by a fifth to £161/sqm (£15/sqft), before increasing again in 2013 to £193/sqm (£18/sqft). Growth then fluctuated between 2014 and 2017, where it returned to its peak of £215/sqm (£20/sqft). Rents continued to increase through to 2019 where it peaks at £236/sqm (£22/sqft), before falling to £215/sqm (£20/sqft) in 2020. Across the whole 23-year period the average annual growth rate was 1.8 percent.

Figure 6 – Headline Rents Achieved (£/sqm), 1998-2020



Source: BE Group, 2021

3.18 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 (£10/sqft). Rents dropped back in 2005/6 and fluctuated between £70-85/sqm (£6.50-7.90/sqft) over the next five years until, as with offices, a sharp drop 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 (£9/sqft) recorded. However, rents decreased to £81/sqm (£7.50/sqft) in 2016 and remained at this level in 2017. Between 2017 and 2020 rents increased by a modest 1.7 percent per year. In 2019 average rent spiked at £107.64/sqm (£10/sqft). However, the increase in the average is largely due to a deal completed on a hybrid unit (both industrial and office uses) which artificially inflated the average rent for 2019. In 2020, headline rents returned to a still strong £86.11/sqm (£8/sqft). The average annual growth rate over this period, for industrial headline rents, was 3.1 percent.

Property Supply

- 3.19 A schedule of the vacant floorspace being marketed in the study area (as of February 2021) 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

- 3.20 Table 3 shows that, as of February 2021, there was 248,048 sqm of marketed industrial floorspace within Warrington, within 75 properties. The available floorspace recorded in 2021, was significantly larger than that recorded in the 2019 EDNA Update (172,662 sqm). This reflected a greater availability of units larger than 2,000 sqm in size, in 2021 – 26 today, against 19 in 2019. However, around a third of the space available in 2021 was accounted for by just two units – the 35,205 sqm, Warrington 379 at Dallam Court and the 23,742 sqm, Warrington 255, Hardwick Grange, Woolston.
- 3.21 The total number of vacant industrial units increased from 62 to 75 over 2019-2021. Availability has increased or the same for all sizes excluding 301-500 sqm and 501-1,000 sqm. Notably, availability of units between 101-300 sqm increased to 25 compared to just nine vacant units in 2018. Geographically, the increase in vacant units was sharpest in Birchwood, where 19 units were available in 2021, compared to seven in 2018. In terms of floorspace, Appleton Thorn has seen a dramatic increase in vacancy, with two units over 10,000 sqm being marketed in Feb 2021. Sankey Bridge also saw a dramatic increase in vacant floorspace with space Warrington Port being marketed to be let.
- 3.22 Woolston contained the largest supply of available floorspace in 2021, comprising of 58,550 sqm in 15 units, against 25,547 (11 units) in 2019. This amount accounted for nearly a quarter of the 2021 total in Warrington. There were two vacant units of between 5,001-10,000 sqm in Woolston, in 2021, both of which were at Kingsland Grange, and one unit over 10,000 sqm in size, a 23,742 sqm unit, Warrington 255, Hardwick Grange. Both the Town Centre and Appleton had over 47,000 sqm of vacant industrial space each.

Table 3 – 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	~	~	~	557	~	2,880	11,436	32,877	47,750
	Number of Properties	~	~	~	1	~	1	2	2	6
Bewsey	Floorspace, sqm	~	1,006	~	942	~	2,294	~	~	4,242
	Number of Properties	~	4	~	1	~	1	~	~	6
Birchwood	Floorspace, sqm	~	1,693	1,313	~	2,794	~	7,593	~	13,393
	Number of Properties	~	13	3	~	2	~	1	~	19
Burtonwood	Floorspace, sqm	~	~	~	~	~	~	8,194	~	8,194
	Number of Properties	~	~	~	~	~	~	1	~	1
Culcheth	Floorspace, sqm	~	490	~	715	~	~	~	~	1,205
	Number of Properties	~	2	~	1	~	~	~	~	3
Gemini	Floorspace, sqm	~	291	717	1,339	~	2,300	~	11,085	15,732
	Number of Properties	~	1	2	2	~	1	~	1	7
Great Sankey	Floorspace, sqm	~	~	~	708	~	~	~	15,515	16,223
	Number of Properties	~	~	~	1	~	~	~	1	2
Latchford	Floorspace, sqm	14	~	~	~	~	2,666	~	~	2,680
	Number of Properties	1	~	~	~	~	1	~	~	2
Sankey Bridges	Floorspace, sqm	~	221	450	~	1,059	~	~	21,525	23,255
	Number of Properties	~	1	1	~	1	~	~	1	4
Thelwall	Floorspace, sqm	~	~	~	~	1,265	3,089	~	~	4,354
	Number of Properties	~	~	~	~	1	1	~	~	2
Town Centre	Floorspace, sqm	9	398	~	558	~	4,181	7,304	35,205	47,655
	Number of Properties	1	2	~	1	~	1	1	1	7
Winwick	Floorspace, sqm	~	~	~	~	~	4,815	~	~	4,815

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+	
	Number of Properties	~	~	~	~	~	1	~	~	1
Woolston	Floorspace, sqm	~	535	1,132	~	2,243	15,045	15,853	23,742	58,550
	Number of Properties	~	2	3	~	2	5	2	1	15
Total	Floorspace, sqm	23	4,634	3,612	4,819	7,361	37,270	50,380	139,949	248,048
	Number of Properties	2	25	9	7	6	12	7	7	75

Source: BE Group, 2021

3.23 Unsurprisingly, there was limited available in primarily residential parts of Warrington such as Orford, Culcheth, Thelwall and Bewsey, both today, in 2019 and in 2016. No availability was recorded in the southern and eastern settlements of Stretton or Lymm.

3.24 Building quality is broken down into three category assessments as shown in Table 4, 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.

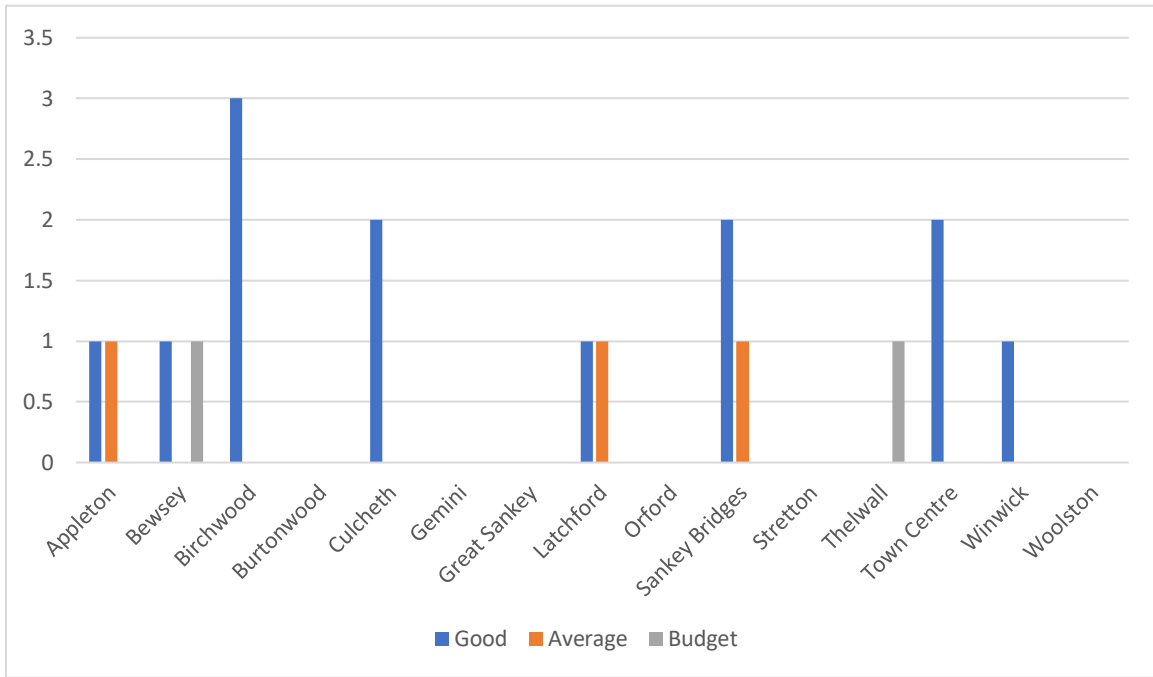
Table 4 – Building Quality Assessment

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

Source: BE Group, 2021

3.25 Figure 7 shows that, of the available units with pricing data available, good quality premises comprised around 70 percent of the available stock. However, only 18 of the 73 units that were marketed to be let, provide asking rents, a relatively small proportion of the total. All units found within the Town Centre, Culcheth, Winwick and Birchwood with asking rental figures provided were deemed good quality stock, along with most units in Sankey Bridges. Only two budget units were identified, one in Bewsey and one in Thelwall.

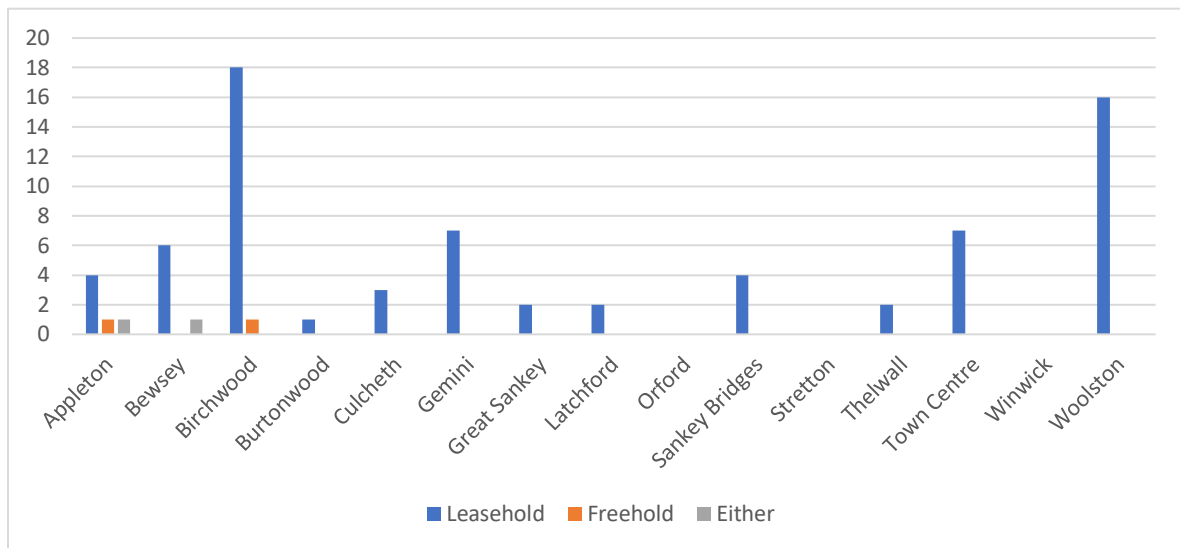
Figure 7 – Quality of Marketed Industrial Property



Source: BE Group, 2021

3.26 Figure 8 below shows that the majority (95 percent) of premises were available on leasehold terms only. Two units were available with a freehold tenure, and a further two units (4.8 percent) were available either to let or purchase. This is not dissimilar to the positions in 2016 and 2019 and shows that the supply of premises available for sale has not noticeably increased.

Figure 8 – Tenure of Marketed Industrial Property



Source: BE Group, 2021

Office

- 3.27 Table 5 shows that, as of February 2021, there was 70,396 sqm of marketed office floorspace, comprised of 118 properties. The number of marketed properties is flexible in practice as some office properties can be sub-divided in a variety of ways. The total floorspace being marketed 2021 is noticeably increased on 2019 when there was 49,167 sqm of vacant office space. However, the office space in 2019 did comprise of 164 properties, significantly more than what was on the market in early 2021. The supply reduction, in terms of number of units, is for all sizes of suite below 300 sqm. The number of units above 300 sqm, on the market, has increased or stayed the same in each size band.
- 3.28 As was in 2016 and 2019, the largest supply was found at Birchwood, the Borough's prime motorway accessible employment area, with 57 available properties comprising 47,548 sqm, around two-thirds of the stock on the market by floorspace. Supply included the 5,090 sqm Stanford House, the largest marketed office. Additionally, 2 Kelvin Close (4,696 sqm) was also being marketed. Birchwood was the only source of large offices, greater than 2,000 sqm in size, in the Borough, other than Clearwater, Lingley Business Park, in Great Sankey, which was the largest office building being marketed, at 5,612 sqm. Several small units are also being marketed at the Genesis Centre, making up a significant proportion of the marketed premises under 100 sqm.
- 3.29 The other supply focus was Warrington Town Centre where 10,348 sqm of floorspace can be found, in 36 units, again sharply reduced from 89 in 2018. St James Business Centre contributes towards a significant number of marketed units below 300 sqm in Table 10. Other, more residential locations in Warrington, such as Grappenhall, Lymm and Latchford have very little office availability, with only one or two premises marketed in these locations.
- 3.30 The Town Centre includes two large business centres with significant office space being marketed, Dallam Court and St James' Business Centre. As of February 2021, St James Business Centre had the largest amount of marketed office floorspace in the Town Centre, some 2,391 sqm, followed by Dallam Court with 1,022 sqm of marketed office space

across various units. Collectively these business centres accounted for just under a third of the total marketed space in Warrington Town Centre.

Table 5 – Amount of Marketed Office Property

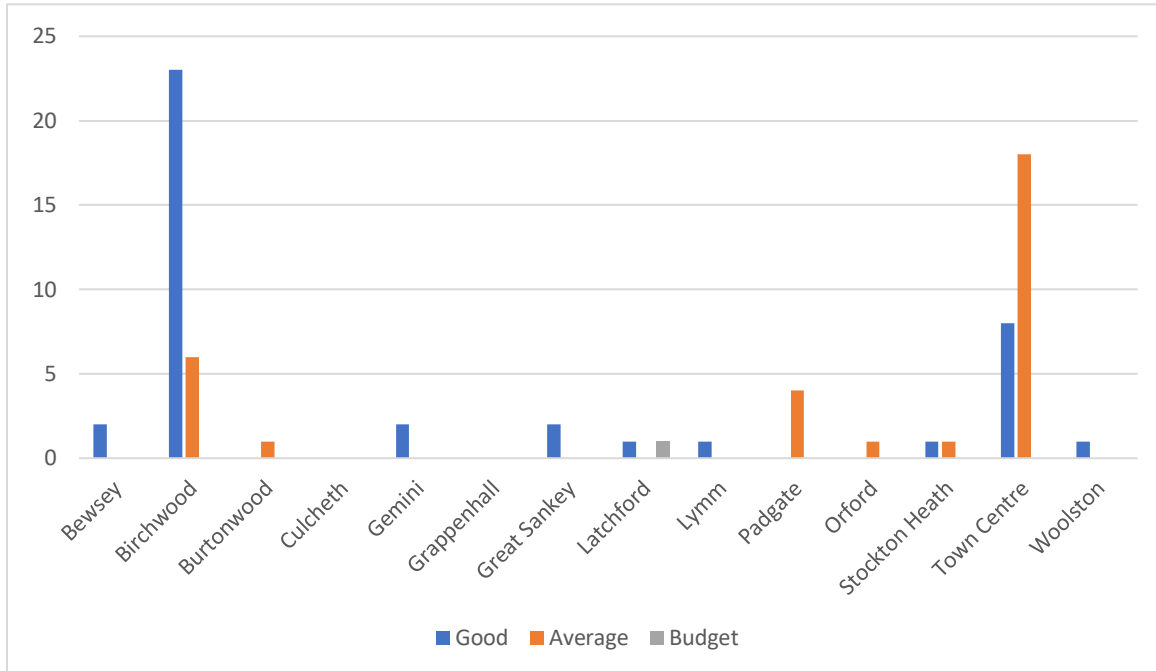
Area		Size Band, sqm								Total
		0-100	101-300	301-500	501-1,000	1,001-2,000	2,001-5,000	5,001-10,000	10,000+	
Bewsey	Floorspace, sqm	9	~	301	932	~	~	~	~	1,242
	Number of Properties	1	~	1	1	~	~	~	~	3
Birchwood	Floorspace, sqm	677	2,035	2,949	14,459	1,381	20,957	5,090	~	47,548
	Number of Properties	13	10	8	17	1	7	1	~	57
Burtonwood	Floorspace, sqm	97	~	~	~	~	~	~	~	97
	Number of Properties	1	~	~	~	~	~	~	~	1
Culcheth	Floorspace, sqm	161	188	~	~	~	~	~	~	349
	Number of Properties	2	1	~	~	~	~	~	~	3
Gemini	Floorspace, sqm	~	209	~	~	1,363	~	~	~	1,572
	Number of Properties	~	1	~	~	1	~	~	~	2
Grappenhall	Floorspace, sqm	~	~	~	~	1,126	~	~	~	1,126
	Number of Properties	~	~	~	~	1	~	~	~	1
Great Sankey	Floorspace, sqm	~	~	~	~	1,005	~	5,612	~	6,617
	Number of Properties	~	~	~	~	1	~	1	~	2
Latchford	Floorspace, sqm	77	~	~	~	~	~	~	~	77
	Number of Properties	2	~	~	~	~	~	~	~	2
Lymm	Floorspace, sqm	44	~	~	~	~	~	~	~	44
	Number of Properties	1	~	~	~	~	~	~	~	1
Orford	Floorspace, sqm	~	~	471	~	~	~	~	~	471
	Number of Properties	~	~	1	~	~	~	~	~	1
Padgate	Floorspace, sqm	251	~	~	~	~	~	~	~	251
	Number of Properties	4	~	~	~	~	~	~	~	4
	Floorspace, sqm	16	252	~	~	~	~	~	~	268

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+	
Stockton Heath	Number of Properties	1	2	~	~	~	~	~	~	3
Town Centre	Floorspace, sqm	480	2,055	1,914	3,735	2,164	~	~	~	10,348
	Number of Properties	12	12	5	5	2	~	~	~	36
Woolston	Floorspace, sqm	~	386	~	~	~	~	~	~	386
	Number of Properties	~	2	~	~	~	~	~	~	2
Total	Floorspace, sqm	1,812	5,125	5,635	19,126	7,039	20,957	10,702	0	70,396
	Number of Properties	37	28	15	23	6	7	2	0	118

Source: BE Group, 2021

3.31 Figure 9 shows that the majority of marketed office premises in Warrington, in Feb 2021, that provided rental values were of good quality, 56.2 percent. The remaining premises consisted of 31 average quality premises, 42.5 percent of the total, and just one budget suite. 23 good quality offices were being marketed in Birchwood, more than the rest of Warrington combined. The Town Centre had just over double the amount of average quality premises being marketed than good quality premises.

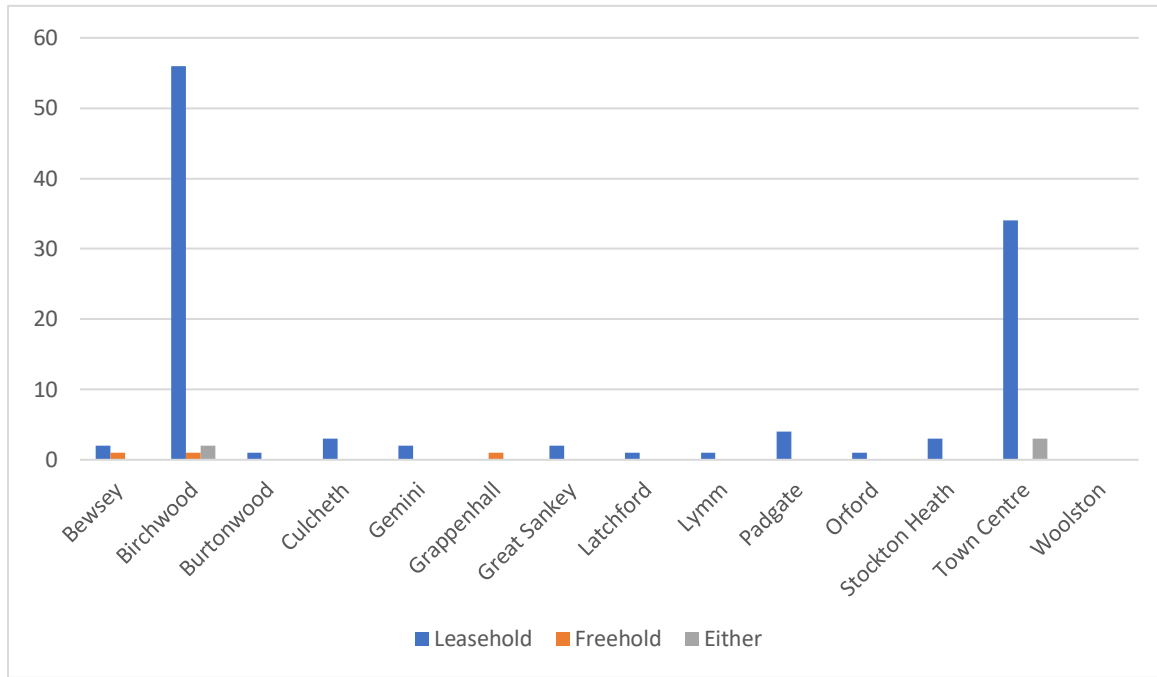
Figure 9 – Quality of Marketed Office Property



Source: BE Group, 2021

3.32 Figure 10 below shows that most available premises were being offered on a leasehold term, 110 properties (93.2 percent). 2.5 percent were being offered freehold only, whilst 4.2 percent of properties were available for either let or purchase. Only Birchwood saw properties available for each of these three tenure categories. This is not significantly changed on 2016 and 2019.

Figure 10 – Tenure of Marketed Office Property



Source: BE Group, 2021

Valuation Office Data

3.33 The Valuation Office Agency (VOA) provides data on the total number of business premises and overall floorspace by local authority. The latest figures have been collected from 2019.

3.34 Occupancy rates of 90-95 percent show a market which is vibrant and active, whilst be able to provide capacity for growth. Higher occupancy rates show a full market with businesses having difficulties in finding available premises, while lower occupancy rates indicate derelict stock and poor business growth.

Industrial

3.35 The figures indicate that there were 1,870 industrial hereditaments in the Borough, which total 1,905,000 sqm. From Table 8, there were 75 available properties totalling 248,048 sqm. This suggests an overall 'occupancy rate' for Warrington of 87.0 percent by floorspace. An high occupancy rate by premises numbers can be seen at 96.0 percent. As the VOA data is updated, occupancy figures here are not comparable to those in the 2016 or 2019 Update EDNA.

Offices

3.36 According to VOA statistics, there were 1,940 office hereditaments in the Borough which total 512,000 sqm. Table 10 shows 118 marketed properties totalling 70,396 sqm identified as available in the Borough, in Feb 2021. This suggests an overall ‘occupancy rate’ of 86.3 percent by floorspace. By premises, the overall ‘occupancy rate’ is 93.9 percent. This figure of occupancy rate by premises may be slightly skewed by the local business centres located primarily in the Town Centre. These centres offer multiple small, serviced suites to the market but which may only be counted as a single property in VOA data.

Property Market – Stakeholders

3.37 The above analysis of the property data pertaining to Warrington has been supported by consultations with commercial property agents active in the Borough. In most cases, the agents consulted were the same as those in 2016 and 2019. 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.

3.38 Tables 6-7 provides a breakdown of the general comments received about industrial and office land in Warrington.

Table 6 – Industrial Market Comments

Contact	Comment
National Agent	<p>Strong demand in Warrington across the board for all sized premises but particularly smaller multi lets of 1,500 sqm and less. A slightly larger proportion of deals are leasehold, however, this in in part due to the lack of supply of freehold premises coming on the market. Prime rents for industrial premises are at around £7.75/sqft (£83/sqm) with deals being achieved on new build units at Birchwood Park of 1,500-2,000 sqm size at this price.</p> <p>Good quality industrial units are achieving in excess of £100/sqft (£1,072/sqm) sale prices.</p> <p>Good mix of sectors looking for industrial premises; online retail sector demand is slightly overstated but general good demand levels across the market. Future large scale logistics development in Warrington could take place in Appleton Thorn</p>

Contact	Comment
	with Omega Warrington nearing capacity. If land doesn't come forward in Appleton Thorn, then future development likely to take place in St Helens or Haydock.
National Agent	<p>Strong demand across the board for industrial units of all size. However, greatest demand is for big box, 7,000-9,000 sqm and mid box 1,000-7,000 sqm units. Supply of big box units is limited so there are less deals for units of this size. Generally, demand is for leasehold deals, especially amongst the larger units. Prime rents for mid box units are £7.50/sqft (£81/sqm). Big box prime rents are around £6.95/sqft (£75/sqm). £6.95/sqft was recently achieved at Omega for the unit Jungheinrich acquired. This agent had an offer in for an Omega unit at £6.95/sqft but the owners are asking for £7.20/sqft (£78/sqm) – the higher price likely due to lack of supply/suitable alternatives. The majority of big box demand is from logistics operators, however, there are occasionally manufacturing requirements in Warrington.</p> <p>Fiddler Ferry is not seen as that desirable as a future site for employment. The agent raised concerns about the site not being well connected to the motorways unlike other sites in Warrington. Also mentioned that other sites are coming forward in the sub-region such as Gorse Point, Cronton Colliery and Liberty Park, which could be seen as more desirable.</p> <p>Most likely locations for logistics development in the future is at Six56 in Stretton or at Parkside and Omega West in St Helens.</p>
Regional Agent	<p>Small unit, sub 300 sqm, in size, are in demand in Warrington with anything of this size being snapped up quickly. Demand for the smaller units is from local businesses. Inward investment tends to be from larger firms looking for larger premises. Enquiries are typically for freehold premises, however, due to the lack of supply, most occupiers settle for leasing premises. Primarily storage/distribution or e-commerce/retailers looking for units. Running costs of high street stores are too high so many businesses are looking to move online and sell from an industrial premise. Some demand from tradesman looking for storage space.</p> <p>Fiddlers Ferry is a good employment site but would ideally be closer to motorway networks. Site has potential to be successful.</p>
Regional Agent	<p>Demand is strong across the board for industrial premises in Warrington but the three sizes of industrial that are most in demand are:</p> <ul style="list-style-type: none"> • Small units 75-150 sqm, prime rents of £10/sqft (£107/sqm) • Medium, 500 sqm units, still go quickly, prime rents £7.50/sqft (£81/sqm). • Big, 35,000 sqm, £7/sqft (£75/sqm) upwards but more of a guess due to lack of supply. <p>Big units are typically demanded by multinational companies and small units typically demanded by local firms. Medium sized units go to a mix of local firms and investors from further afield. Medium and large units are typically demanded/occupied by logistics and storage firms, with the occasional manufacturing requirement. Demand is a mix of both freehold and leasehold</p>

Contact	Comment
	<p>with neither dominating enquiries. Land release is needed in the M6/M56 area for future logistics development. Anywhere between Thelwall viaduct through to Haydock would be ideal as there is strong demand in this area.</p> <p>Fiddlers Ferry not viewed as a desirable location for future industrial development due to potential access issues and distance from the motorway network.</p>
National Agent	<p>Majority of demand is for sub 1,000 sqm units which small and medium sized enterprises (SME's) occupy. Demand is from range of businesses; from local, regional and national. Warrington is well connected location with motorways making it a prime location for firms of all sizes. Majority of deals are leases, with a lack of available freehold options restricting demand.</p> <p>Prime rents:</p> <ul style="list-style-type: none"> • For 3,000 sqm or less, terraced premises, e.g., at Birchwood Park – £7.75/sqft (£83/sqm) • Mid box – 3,000-9,000 sqm, £7.50/sqft (£81/sqm) • Big box – 9,000 sqm plus, based on omega £7/sqft (£75/sqm). <p>Broad mix of sectors looking for industrial space in Warrington. Online retail and logistics driving industrial demand in Warrington and regionally/nationally. Also parcel delivery companies e.g., Hermes, for warehousing, storage and some manufacturing firms but more limited.</p> <p>Fiddlers Ferry could be a good industrial employment site, although transport connections to the site are poor. The site has the potential to take big buildings but isn't in a prime location. The Gorsey Lane development could complement site.</p> <p>Future logistics development in Warrington is likely to take place at Six56 near Barleycastle Trading Estate. Potentially could have large industrial units at Fiddlers Ferry.</p> <p>There is a chronic lack of supply of development land in Warrington. There is a desperate need for sites to be consented for much needed industrial space to meet demand. If sites don't come forward occupiers will consider other regions.</p>
National Agent	<p>Most in demand size of industrial units in Warrington are sub 2,000 sqm or over 10,000 sqm Predominantly deals are leasehold due to a lack of supply of freehold industrial space in Warrington, especially at smaller end. Prime rents on units over 10,000 sqm - £6.95/sqft (£75/sqm). Prime rents on units below 2,000 sqm - 7.75/sqft (£83/sqm). No freehold deals in Warrington to refer to but sales of up to £150/sqft (£1,615/sqm) achieved elsewhere. Key sectors enquiring for industrial space include online retailers, Last-mile firms, big distribution companies.</p> <p>Future sites in Warrington with potential for logistics include Fiddlers Ferry and land in Appleton Thorn.</p>

Source: Various Stakeholders, 2021

Table 7 – Office Market Comments

Contact	Comment
National Agent	<p>Strongest demand for office units sub 500 sqm. Some demand for units of 1,000-2,000 sqm with occupiers attracted by the good motorway access. Generally, demand is from local businesses and those from South Manchester. Typically, more demand for leasehold deals – majority of deals are leasehold due to lack of available premises for sale. Prime rents are believed to be around £22/sqft (£237/sqm) with deals for good quality space at Birchwood Park going for around this. Good quality office space can sell for between £100-120/sqft (£1,076-1,292/sqm). Currently marketing an older office unit for around £80/sqft (£861/sqm) which is viewed to be good value for a second-grade unit.</p> <p>The Town Centre office market has always struggled as access in and out of town is not good which deters occupiers hence why Centre Park in the town centre has always struggled. View is that future demand in Warrington will remain in business parks and stay away from town centre. Doesn't think that the Covid-19 Pandemic and social distancing requirements will influence where occupiers look to locate long term. Believes demand will still be centred in city centres e.g., Manchester, as firms will always want to retain/gain the highest quality staff and graduates to their businesses. Town centre offices make their firm a more attractive employer.</p>
Regional Agent	<p>Office demand is “really quiet” in Warrington currently, with this particular agent not having completed on an office in the last 6 months. Believes that what demand exists is for a mix of both freehold and leasehold with neither dominating enquiries. Prime rents at Centre Park in the town centre are around £14/sqft (£151/sqm) and asking prices are around £100/sqft (£1,076/sqm). Believes that asking rents could fall post-Covid as office operators are desperate to find occupiers. Doesn't see Warrington Town Centre becoming a strong office location unless the issue of traffic and parking is addressed. Mentioned that existing office premises in the town centre have had a change of use to residential due to a lack of demand. Believes Warrington will be well placed to pinch regional office demand if businesses make the decision to not focus in city centres on back of the Covid-19 Pandemic's requirements for social distancing. Can foresee some business requirements shifting from city centres to smaller business parks such as Birchwood.</p>
Regional Agent	<p>Generally strong demand for units between 20-100 sqm capable of housing one or two workers. Also demand for units around 350 sqm, with the next level of requirement being for far larger HQ office facilities. Generally greater demand for unserviced units than serviced, although, small, one person suites are normally “quasi-serviced” with most offering Wi-Fi, phone lines and furnished, but not offering management services (e.g., receptionist, business support, etc).</p> <p>Prime rents for office space in Warrington between £18-20/sqft (£194-215/sqm). Doesn't view Warrington Town Centre as a strong or upcoming office market due to its poor quality rail service and traffic. These factors reduce the ease of getting in</p>

Contact	Comment
	and out of the office which is an important requirement for many occupiers. Ease of access is why schemes in Risley and Daresbury are so successful. Doesn't believe that firms in Manchester would look to relocate to Warrington as Manchester is an office market of its own. Warrington only likely to benefit from a modest number of Manchester based firms looking to downsize as more staff are home based.
National Agent	<p>Birchwood is Warrington's strongest office market location with good access and established business parks. Units between 500-1,000 sqm are most sort after. The majority of demand is for unserviced units, however, still some modest serviced demand.</p> <p>Seeing both leasehold and freehold demand in Warrington. The freehold market has held up well in 2020/2021.</p> <p>Recent headline rent achieved at Bridgewater Place, Birchwood £22/sqft (£237/sqm). Prime sale price is around £150/sqft (£1,615/sqm) with some instances of units being sold for more; typically design and build type schemes.</p> <p>Views the business parks in Warrington being the strongest location for office sector growth in the future due to superior access. Also, industries in Warrington lend themselves towards a business park environment e.g., nuclear sector. Doesn't anticipate businesses choosing to locate in more accessible business parks as opposed to city centres such as Manchester. Benefits to recruitment of being in Manchester City Centre are too great.</p>

Source: Various Stakeholders, 2021

- 3.39 Demand remains strong for industrial and logistics premises in Warrington with enquiries/deals reported for a variety of unit sizes ranging from 0-9,000 sqm. Within this both micro/small business accommodation of sub 1,500 sqm and larger mid-sized and big box units seem to be all in good demand. Strategic requirements for B2/B8 properties of 35,000 sqm or more are noted, although as such very large properties only come on the market infrequently it is difficult for stakeholders to be clear on the overall level of demand.
- 3.40 Reported rents vary depending on unit size. Prime rent for a high quality unit under 2,000 sqm sits at around £7.75/sqft (£83/sqm). For 'big box' units, prime rent appears to be around £7/sqft (£75/sqm), rising slightly to £7.20/sqft (£78/sqm) at Omega where a shortage of supply has pushed up rents.
- 3.41 The majority of demand for industrial premises in Warrington is for units to be used for storage and distribution/logistics and, to a lesser degree, manufacturing. Most agents found that leasehold slightly outweighs freehold demand, however, freehold demand is restricted by a lack of freehold industrial premises being marketed.

- 3.42 Fiddlers Ferry is viewed as a site that has the potential to be a successful employment site in Warrington, however, concerns were raised with regards to access to the site and its distance from the major motorway networks. Sites with more direct motorway access are preferred with the focus on a strategic scale development in South East Warrington, close to the M6/M56 Interchange. This view remains unchanged from the 2019 EDNA Study.
- 3.43 While weaker in 2020/21 than was the case in 2019, office market demand continues in Warrington. Market interest is for smaller suites of sub 500 sqm and particularly sub-350 sqm, to meet micro/small business needs. Also, larger HQ office facilities of up to 2,000 sqm.
- 3.44 Demand is mostly local or sub-regional, with interest focused in Birchwood rather than Warrington Town Centre. With regards to offices in the Town Centre, agents largely reported the same issues as in 2019, namely that poor access and limited parking limits demand. Additionally, some strong local sectors such as nuclear technologies tend to favour business park settings over town centres and have established clusters in Birchwood.
- 3.45 Best office rents in Birchwood are £22/sqft (£237/sqm), and £14/sqft (£151/sqm) in the Town Centre and Centre Park. Sales prices are around £150/sqft (£1,615/sqm) in Birchwood and £100/sqft (£1,076/sqm).in, and around, the Town Centre. There remains freehold demand for offices which is difficult to meet from the existing stock.
- 3.46 One question asked of stakeholders was whether the impacts of Covid-19 and the resulting requirements for social distancing might encourage some businesses in Manchester and Liverpool to look outside of high density city environments, to more flexible options in out of town business parks such as Birchwood. The consensus was that while a modest number of companies might look to leave the cities, fully or partially, city centre working will remain attractive to a majority of occupiers once the restrictions on working practices are lifted.

Other Stakeholders

- 3.47 Officers and representatives of Warrington and Co. and Warrington Chamber of Commerce were also contacted to discuss the local property market, with some focus on Warrington Town Centre.

Warrington and Co

3.48 There are no high grade offices in the Town Centre, however, Warrington and Co. expect that to change as the Council occupies its new offices. It has had 4-5 requirements for companies to sit alongside the Council. Demand for offices is reasonable with limited space at present. Centre Park is an established edge of centre office site, but traffic means that access can be difficult, and the surrounding environment is poor. Not a good offer overall.

3.49 While demand exists, and appears to continue to exist in 2020/2021, Warrington Town Centre has historically had a lack of brownfield office land and pressure to use what land there is for housing. There are, however, several regeneration schemes in, and around, the Town Centre which might deliver offices and industrial uses in the future:

- *Time Square/DW Fitness Site* – Muse have the option for Phase II of the DW Sports site and are now indicating that offices would be viable alongside new facilities for the University of Chester on Barbauld Street
- *Island Scheme* – Was to be offices, now housing assuming ongoing demand for dense town centre living
- *Stadium Quarter* – Muse confident they can deliver Phase II, despite some on site abnormalities. It argues that 5,000-6,000 sqm of offices would let/sell quickly here and have seen past developer interest for offices around Central Station. Warrington and Co. would be happy to support a scheme here if they could secure around 50 percent pre-let. The Stadium Quarter and Time Square are LEP Growth Projects, meaning businesses will get rates relief, something which will boost demand. Proposals could include the relocation of the Police from Arpley Street to the Stadium Quarter, freeing up that site for housing or offices
- *New Town House/Quattro/Cockhedge Centre* – *The Cockhedge Centre* owners looking to undertake a joint redevelopment with the other owners. Such a redevelopment will likely be mostly for housing but the tower at the rear could be commercial, possibly providing 10-11 stories of offices. This location was also considered as a site for a new Warrington Hospital. However, the funding, up to £400 million, is not in place for this and it is unlikely to happen in less than 3-4 years

- *Unilever Land* – Unilever want to dispose of the surplus land in its edge of centre facility as fast as possible, regardless of what happens with the adjoining occupier PQ Silicas. The land is being sold by CBRE and is understood to be receiving interest from industrial occupiers. Warrington and Co. Would like to see a light industrial scheme here.

Warrington Chamber of Commerce

Offices

- 3.50 The Chamber gave the example of The Base as a successful serviced office scheme with a specialism in technology/engineering/advanced manufacturing. After a slow initial take up, The Base had reached 73 percent occupancy before the start of the Covid-19 Pandemic. In early 2021, occupancy reduced to 63-66 percent, lower, but not significantly so, and The Base has retained a strong community of businesses. Other business centres in the surrounding area of the Stadium Quarter have remained full through the Pandemic.
- 3.51 The Chamber is unsure to what degree people have now got used to working from home and will not want to return to the office, once restrictions end. Generally, it would like to see the return of a strong office economy in Warrington Town Centre, if only because this can be a strong generator of footfall for the retail/leisure sectors.
- 3.52 Over the Covid-19 Pandemic it has been beneficial that Warrington Town Centre has not been as dependant on an office economy for trade and footfall, like locations such as Spinningfields, Manchester. However, once the recovery commences, it would like to see investment in Grade A office offer in the Town Centre. This would help diversify the local economy and build on Warrington's strong public transport links. The Stadium Quarter and/or JD Sport sites would be strong locations for such new offices.
- 3.53 However, demand for large HQ type offices is weak across the Borough. This is evidenced by difficulties in letting the 600 sqm Expedia Building. Additionally, Cavendish Nuclear, which opened a major business hub in the 4,600 sqm 106 Dalton Avenue, Birchwood in 2018 is now looking to sub-let a floor of the building. While this floor may ultimately be let to other parts of Cavendish's operations, it is still seen as evidence of limited demand from large companies.

- 3.54 Most larger businesses encouraged the majority of their staff to work from home over 2020-21, and it is likely that majority homeworking will stay once the Covid-19 Pandemic is ended. This is reducing demand for space. There will likely be requirements for up to 50-100 person offices, but interest for 200 person plus offices will be very limited and many firms may seek to downsize over the next few years. Warrington could benefit from some large Manchester and Liverpool based businesses seeking smaller footprint offices outside of the cities.

Industrial

- 3.55 Omega has taken the bulk of the large requirements in Warrington in recent years, particularly once the site was opened up to B8 uses instead of the previous focus on advanced manufacturing. However, major B8 operations have a dependence on external labour, including international workers, as well as the foreign trade of goods which may be affected by Brexit.
- 3.56 Omega benefited from immediate access to an extensive labour pool from Greater Manchester and the Liverpool City Region. An equivalent development in South East Warrington would be slightly more distant from those labour sources.
- 3.57 The loss of production facilities at the Unilever Site in Central Warrington is reflective of the limited, and declining, manufacturing economy in Warrington. The Chamber would like to see the Unilever Site redeveloped for housing and offices to form a strong gateway feature for Warrington. Would also like to see better use of other attractive features in Warrington such of the Transporter Bridge.

Summary

- 3.58 As a large part of the UK's retail and service economy moved online in 2020 with the national Lockdowns, demand for B8 premises grew strongly. Bolstered by the strongest fourth quarter ever recorded –14.3 million sqft (1.33 million sqm) – annual national take-up of logistics space soared to an all-time high of 50.4 million sqft (4.68 million sqm).
- 3.59 In the North West, e-commerce/logistics was the dominant sector in the big shed market accounting for 95 percent of all take-up. The Covid-19 crisis has clearly accelerated the expansion of this sector leading to several high-profile occupiers taking additional space

- in the North West during the second half of 2020. However, the supply of warehouse space in the North West has decreased dramatically in the last 12 months leaving only 1.07 years of supply in the region, according to Savills.
- 3.60 Strategic B2/B8 demand is for units of 9,000-25,000 sqm. Prime rents were £6.75 - £6.95/sqft (£73-75/sqm) in 2020 but with the current demand/ supply dynamics, quoting rents will increase to £7.00 – £7.50/sqft (£75-81/sqm) on new schemes being brought forward during 2021.
- 3.61 Regional office markets proved relatively resilient in 2020. While a lot of growth plans had to be paused or scrapped after March, businesses have now had time to plan for the future and how they will adapt over the long term. Flexible options will be sought, and movement within sub-region's is likely as businesses seek smaller or larger accommodation depending on what proportion of their staff, they wish to be back into office working. High density business centres may suffer from an inability to provide socially distanced space, although the main business centres of Warrington Town Centre have not reported a significant drop in occupancy.
- 3.62 Warrington and Co. have received 1,513 enquiries since 2006, representing only a modest sample of the total demand for land and property across the Borough. The total number of enquiries rose from 42 in 2019/20 to 59 in 2020/21. However, these levels of enquiries are the lowest since 2013/14. In the industrial sector, almost half of enquiries were for space less than 250 sqm, although there is reasonable evidence of demand for premises up to 5,000 sqm in size. For offices, the bulk of the demand was for properties of 0-250 sqm.
- 3.63 Since 1998, BE Group has completed an annual report on Warrington's property market, recording office, industrial/warehouse and investment deals of more than 200 sqm. Over that 23-year period an average of 18 deals were recorded each year, with an average annual investment total value of £97 million. Whilst office units averaged 34 deals, in around 24,300 sqm of floorspace annually, industrial saw an average annual transaction rate of 54 deals a year, taking up an average of 93,918 sqm of floorspace each year.
- 3.64 In 2020 the total industrial floorspace transacted increased to 145,300 sqm, 120 percent higher than the total from the year before and the highest since 2014. Some of this reflects take up at Omega, but it is still evidence of how well local market activity has held up, and even improved, during the Covid-19 Pandemic.

- 3.65 In 2020 there were just 29 office deals completed, a nine-year low. Excluding two exceptionally large transactions by the Council, only 12,499 sqm of office floorspace was transacted the second lowest annual amount in the 1998-2020 period. In 2020 headline office rents were £20/sqft (£215/sqm) and industrial rents at £8/sqft (£86.11/sqm). The latter represents reasonable rental growth in recent years, the former a decline on a 2019 peak of £22/sqft (£236/sqm).
- 3.66 As of February 2021, there was 248,048 sqm of vacant industrial floorspace being marketed in Warrington, within 75 properties. The available floorspace recorded in 2021, is significantly larger than that recorded in the 2019 Update EDNA (172,662 sqm). This reflects the greater availability of medium-large units in Warrington, greater than 2,000 sqm in size – 26 today, against 19 in 2018. 379 at Dallam Court, the largest marketed unit, was 35,205 sqm in size. 95 percent of marketed industrial premises were available on leasehold terms only.
- 3.67 As of February 2021, there was 70,396 sqm of marketed office floorspace, comprising of 118 properties. The total floorspace being marketed was notably increased on 2019 when there was 49,167 sqm of vacant office floorspace. However, in 2019 there were 164 properties on the market, indicating that the 2021 supply comprises a smaller number of larger units. As was the case in 2019, the available office supply was focused in Birchwood. Birchwood was also the main source of larger offices, greater than 2,000 sqm in size.
- 3.68 These supply figures for Warrington indicate well performing industrial and office markets, with a suggested overall ‘occupancy rate’ for industrial units by floorspace of 87.0 percent. Similarly, for office units, a 86.3 percent occupancy rate by floorspace has been calculated. These are reasonable occupancy rates overall, but still offer some supply for business relocation and growth. By number of premises however, the industrial stock is 96.0 percent occupied, suggesting a more limited availability in practice.
- 3.69 Property market stakeholders stated strong demand for industrial and warehouse premises across a range of sizes up to 9,000 sqm. There is continued demand for strategic logistics units of up to 35,000 sqm to compete in the regional/national market, as well as smaller local units. With Omega Warrington nearing capacity, many agents view Appleton

Thorn as the logical location for future industrial/logistics development. Fiddlers Ferry, while expected to do well, is judged of secondary interest to directly motorway accessible locations.

- 3.70 While weaker in 2020/21 than was the case in 2019, office market demand continues in Warrington. Market interest is for smaller suites of sub 500 sqm and particularly sub-350 sqm, to meet micro/small business needs. Also, larger HQ office facilities of up to 2,000 sqm.
- 3.71 Demand is mostly local or sub-regional, with interest focused in Birchwood rather than Warrington Town Centre. Despite this, key local agencies such as Warrington and Co. highlighted a number of opportunities for the delivery of new office space in Warrington Town Centre and were confident that at least some of these could be brought forward in the long term at least, to build up the modest office economy of Central Warrington. Warrington may derive some benefits from Manchester/Liverpool based businesses looking for lower density options, outside of urban areas, for socially distanced working. However, the consensus of stakeholders is that cities will remain attractive places for a majority of businesses to work from.

4.0 EMPLOYMENT LAND SUPPLY UPDATE

Introduction

- 4.1 This section provides an updated picture of the portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. By initially establishing how much land there is, the second task is to consider how much land is needed in the future (to 2038), which is picked up in Section 7.0 later in the report.

Land Supply

- 4.2 From a Baseline position of 97.03 ha (17 sites), as of the April 2018 Monitoring period, the 2019 EDNA update removed sites then developed, heavily constrained, lost/expected to be developed for alternative (non B-Class) uses or held to meet the use of specific companies only. This gave a realistic supply of 83.91 ha in 17 sites of which 23.94 ha in 13 sites represents the local supply and 71.5 percent, 59.97 ha in four sites, represents the strategic (Omega) supply.
- 4.3 This Update study reviews that 2019 realistic supply again to allow for further changes over 2018-21. It removes sites which:
- Are constrained
 - Where the emphasis, through landowner/developer intentions, surrounding uses and/or planning allocations/consents, is on alternative (non B-Class) uses
 - Where development has completed since 2018
 - Where any development will be to meet the needs of a single existing occupier only and will not meet wider market demand.
- 4.4 Table 8 updates the 2018 supply picture, using as its base, the latest (February 2021) Employment Land Supply Monitoring data provided by the Council, plus the findings of the 2019 EDNA, where this identified further available land, not picked up in the Monitoring. 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.

Reflecting the criteria set out in Paragraph 4.3 above, the realistic supply of Warrington Borough, as of March 2021 is **38.87 ha in 9 sites**, comprising:

- Strategic (Omega) supply: **12.7 ha** (32.7 percent), one site
- Local Supply: **26.17 ha** (67.3 percent), eight sites.

4.5 Some points to note:

- With the entirety of Omega South's Zone 7 now developed and let as Mountpark, Phase I and a large proportion of the remaining land from Omega South Phases 1 and 2 lost to residential, the remaining supply at Omega South comprises a modest 12.7 ha. As seen in Table 13 above, planning consent has been given for three B2/B8 units on this remaining land. This development is known as Mountpark Phase II, with construction of the three units expected to be complete by the end of 2021/early 2022. Omega South will thus soon be at full capacity
- With the completion of the Scania maintenance depot, Omega North is also fully occupied.
- Two new proposals in Appleton Thorn have come forward since the last EDNA update in 2018, both of which are for sites on Appleton Thorn Trading Estate. The applications are for majority B8 employment space with and provide 6.48 ha of Local Supply. There were previous consents at Appleton Thorn in the 2019 EDNA, which have since been completed. Thus, this area remains a focus for local development activity.
- At Lingley Mere, the majority of the land has now been lost to housing, with Phase 3 expected to be developed soon for industrial uses and, likely, further housing. Only 1.15 ha at Phase 1 remains as long term supply.
- Birchwood Park is the only part of the Borough which retains a long term supply, 8.71 ha as of March 2021, in four plots which are suited for both office and industrial/warehouse development. Birchwood has seen several developments of industrial units in recent years, the last, Quadrant Phase 2, completing and letting during the 2020/2021 Covid-19 Pandemic.
- Both Local and Strategic Supply has roughly halved since the 2019 EDNA update. The Strategic Supply at Omega represents a larger proportion of realistically available land in Warrington in 2021 than in 2018.

Table 8 – Employment Sites Schedule

Site Ref.	Site Name	Baseline Site Area*	Realistic Site Area**	Comments	Availability, years
Strategic Employment Land Supply - Omega					
Omega Phases 1 & 2 Remainder	Mountpark Warrington Omega II	12.7	12.7	<p>2019/35646 – Reserved matters planning consent for three B2/B8 units on 12.7 ha in the north of the site, totalling 68,404 sqm. This represents the remaining area of undeveloped, consented employment land in Omega South.</p> <p>Land to the south, now re-named phase 4-7 Omega South, is now consented for mixed use development including 617 homes (2019/36241).</p> <p>On the market as Mountpark Warrington Omega II. Units 2 and 3 are on the market, to let:</p> <ul style="list-style-type: none"> • Unit 2: 18,876 sqm • Unit 3: 20, 932 sqm. <p>Meal box delivery company Gousto have agreed a lease for Unit 1 (28,596 sqm). Construction has started on Unit's 1 and 2 and is expected to complete by the end of 2021. Unit 3 was identified as a second phase, but construction has also started on this unit, so completion is likely within a year.</p>	0-1
Sub Total		12.7	12.7		
Local Employment Land Supply					
356	Gemini 8 Retail Park, Charon Way, Westbrook	4.34	4.34	<p>Original proposal comprised the following:</p> <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' – all now built. • 2.03ha – B1(a) office (10,917 sqm gross floor area) – Not developed. • 3.18ha – B1(c)/B2/B8 industrial (12,450 sqm gross floor area) – Superseded by the below. <p>Athelis Leisure Centre, consented in application 2018/32405, is now built with the loss of 0.87ha of land.</p>	1-5

Site Ref.	Site Name	Baseline Site Area*	Realistic Site Area**	Comments	Availability, years
				<p>Additionally, in 2018 full planning permission was granted for the proposed construction of a two-storey car sales building with workshop, construction of single-story wash and valet building along with external vehicle display and customer parking. This has yet to commence</p> <p>Full planning permission was granted in October 2020 for 18 units for use Class B1c (E(g)(iii)), B2 or B8 with a gross external area of 11,110 sqm. Individual units will be 361-1,556 sqm in size, in two main terraces, taking up 2.07 ha in the east of the site. The 18 units are currently being marketed to let, with the units predicted to be ready to be occupied by the end of 2021.</p> <p>Assuming success of this scheme, other remaining land is likely to be developed for similar.</p>	
367	The Quadrant (South), Birchwood Park	1.87	1.87	<p>Proposed for seven units totalling 12,225 sqm. Units 711 (1,298 sqm), 712 (1,623sqm) and 713 (2,008 sqm) are completed and let. Under revised plot numbering these comprise plots 718 and 719</p> <p>Thus, four units totalling 7,296 sqm remain to be delivered on approx. 1.87 ha of land (Plots 714-716). This is now referred to as the Quadrant Phase III.</p> <p>Patrizia report interest from industrial end users for the remaining sites in the Quadrant. It may also build out a further phase of 2,000 sqm units. Delivery of the outstanding space therefore likely in the next few years.</p> <p>Falls within the Cheshire Science Corridor Enterprise Zone.</p>	1-5
381(a)	Quadrant Phase 2 Birchwood Park	6.41	0	<p>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). Several subsequent Reserved Matters applications.</p> <p>Proposed for five B2/B8 units with a GIA of 17,387 sqm, split:</p> <ul style="list-style-type: none"> • 717 – 1,941 sqm • 718 – 1,941 sqm • 719 – 2,471 sqm • 720 – 5,923 sqm • 721 – 5,109 sqm. <p>Site complete as of March 2021 and all occupied.</p>	N/A - Fully Developed

Site Ref.	Site Name	Baseline Site Area*	Realistic Site Area**	Comments	Availability, years
				Rents of £7.50/sqft (£81/sqm) were achieved.	
381(b)	Multiple Plots Birchwood Park	10.50	8.71	<p>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 (E(g), B2 and B8) and ancillary uses (A1/A2/D1/D2)).</p> <p>Proposed for up to 50,464 sqm of E(g) 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:</p> <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 (now 603) – Accommodates car parking/business space for Jacobs, no plans for change. • Quadrant: B2/B8 - discussed separately as site 381(a): Quadrant Phase 2, Birchwood Park. <p>Reflecting analysis in the 2019 and 2021 EDNA Studies, the outstanding land supply is:</p> <ul style="list-style-type: none"> • 107 (1.04 ha): On market for design and build development, likely B2/B8 use • 300 (306) (0.50 ha): Proposed for office uses. • 501-502 – Now just referred to as 501 (2.76 ha): Proposed for office uses. Established interest from a local company. • 701-702– Now just referred to as 722 (4.41 ha): Proposed for industrial uses. <p>All the plots fall within the Cheshire Science Corridor Enterprise Zone.</p>	10+

Site Ref.	Site Name	Baseline Site Area*	Realistic Site Area**	Comments	Availability, years
				All development will be on a design and build basis, responding to individual requirements as they arise.	
357	Phase 1 Remainder - Lingley Mere	1.15	1.15	<p>Planning application 2012/20299 (formally 2004/03286) has outline consent for 8,808 sqm of offices of 1,858-4,459 sqm in size (use class B1(a)) across a wider area.</p> <p>0.8 ha of land lost to residential development (2016/27313).</p> <p>0.4 ha lost to Little Acorns Nursery (2020/36310).</p> <p>With a large proportion of the land lost to housing, and a nursery, the remainder comprises a single plot east of the Ullswater Building.</p> <p>No identified plans for development here, land remains available for development.</p>	6-10
15 A(c)	Phase 3 - Lingley Mere	3.62	3.62	<p>Site was purchased by Canmoor in 2019/20 for £1.85 million/hectare (£750,000/acre).</p> <p>Full planning consent (2020/38264). is being sought for a single new build employment unit comprising 15,604 sqm (GIA) of flexible E(g) (iii)/B2/B8 employment space.</p> <p>This is understood to be a speculative proposal, for a larger B2/B8 unit comparable to those developed at Omega to the north.</p> <p>Most of the frontage of this site now comprises car parking.</p> <p>Proposal involves the clearance of several prefabricated offices north of the Stepping Stones Nursery.</p> <p>United Utilities submitted the eastern portion of this site, east of the Grasmere building, (1.80 ha) to the 2017 Warrington Call for Sites exercise, for housing use. No commitments have been made on this in the Local Plan process, but a residential use seems likely given that all land to the immediate east has now been developed for housing.</p>	1-5

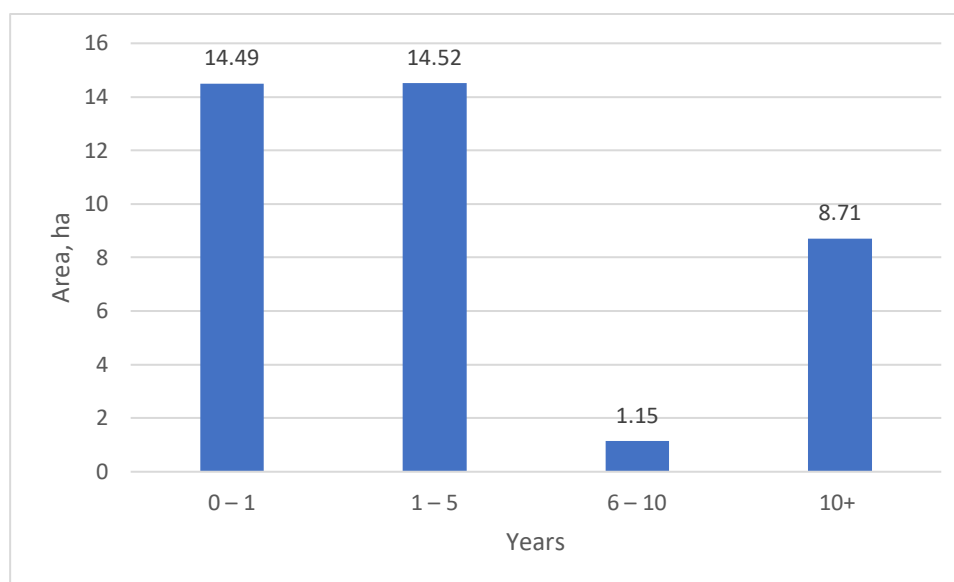
Site Ref.	Site Name	Baseline Site Area*	Realistic Site Area**	Comments	Availability, years
	Unit 4 Appleton Thorn Trading Est, Lyncastle Road	1.79	1.79	<p>Full planning permission granted for application 2019/35280 - Erection of a warehouse (Use Class B8) with ancillary office space (Use Class B1a), creation of access, service yard, parking, earth remodelling to the existing bund, boundary treatment, and landscaping</p> <p>The warehouse unit will comprise 4,688 sqm of floorspace (gross internal area). This is comprised of the following:</p> <ul style="list-style-type: none"> • Warehouse: 4,350 sqm • Office: 309 sqm • Reception: 28 sqm. <p>Speculative development.</p> <p>Construction has commenced with completion expected by spring 2021.</p> <p>Agents report several enquiries for the property, all from B8 businesses. No deal completed yet, but it is not anticipated there will be a problem letting the property on completion. Quoting rent was £7.50/sqft (£81/sqm) and has since been increased to £8.00/sqft (£86/sqm).</p>	0-1
	Travis Perkins Barleycastle Trading Estate	4.69	4.69	<p>2020/37595 - Full Planning (Major) granted - Proposed demolition of existing buildings, construction of Employment Development for B8 Use with integrated office accommodation, parking, gatehouse & warehouse operations office with landscaping and associated works.</p> <p>Proposal for use between Classes B1(c) (E(g) (iii)), B2 and B8 employment, of up to 23,235 sqm GEA and associated infrastructure.</p> <p>Site is on the market, with its existing buildings of 10,209 sqm. Implementation of the consent will therefore depend on the new owner.</p>	1-5
Sub Total		34.37	26.17		
Total		47.07	38.87		

Source: WBC and BE Group, 2021

Realistic Supply Analysis

- 4.6 Figure 11 provides an analysis of the 2021 realistic supply, as defined above, by availability. As noted, the assessment of timescale is based upon several factors – market demand, overview (from discussions with stakeholders and site owners), planning status, infrastructure and services required.

Figure 11 – Location and Availability Assessment (Realistic Supply)



Source: BE Group, 2021

- 4.7 The first point to note is that nearly two thirds of the Local Supply and all the remaining Strategic Supply are likely to have been developed within five years. These are all sites with clearly defined plans for development, most of which have planning consent and are under developer control. Schemes at Gemini 8, Unit 4 Appleton Thorn Trading Estate and Phase 3 Lingley Mere are all expected to commence, and likely complete in 2021/2022. Omega Phases 1 and 2 Remainder (Mountpark Phase 2) has commenced and this last parcel of employment land in Omega South could be completed within a year.
- 4.8 Only Birchwood Park has an employment land supply likely to last more than a decade and even here, based on recent performance at the Quadrant, all the industrial/warehouse plots in that supply are likely to be taken up far more rapidly.
- 4.9 Land is divided between four types of uses – E(g)(i) Offices, E(g)(iii)/B2 Industry, B8 Warehousing and a mix of these (see Table 9). In the case of Omega, a fifth category,

Strategic B2/B8, is added. It is assumed that most ongoing take up at Omega will be for larger B2 or B8 options.

Table 9 – Use Class Assessment (Realistic Supply)

Location	Use Class					Total, ha
	E(g)(i)	E(g)(iii)/ B2	B8	E(g), B2, B8	Strategic B2/B8	
Appleton	-	-	1.79	4.69	-	6.48
Birchwood	-	1.87	-	8.71	-	10.58
Lingley Mere	1.15	-	3.62	-	-	4.77
Warrington Central/ Town Centre	-	-	-	-	-	-
Westbrook	-	-	-	4.34	-	4.34
Local, Sub-Total	1.15	1.87	5.41	17.74	-	26.17
<i>Strategic (Omega)</i>	-	-	-	-	12.70	12.70
Total, ha	1.15	1.87	5.41	17.74	12.70	38.87

Source: BE Group, 2021

- 4.10 In terms of local supply, two thirds comprise land which is proposed for a mix of mostly industrial and smaller warehouse uses. The only specifically office site is the remainder of Lingley Mere Phase 1. Plots totalling 5.95 ha also remain at Birchwood Park, which would suit office uses. However, given the recent success of industrial uses there will likely be pressure to maximise B2/B8 development within the Park. It is also worth noting there is no pipeline of consented office space in Warrington Town Centre, as of spring 2021.
- 4.11 The realistically available supply of Strategic B2/B8 has significantly declined since 2018, from 48.67 ha to just 12.7 ha. This reflects the speed of take up at Omega Warrington, with Omega North and Zone 7 of Omega South now at full capacity. Remaining land for strategic development is what remains of Phases 1 and 2 of Omega South. This land has planning permission for three B8 units with construction expected to be complete on two of the three units by the end of 2021.

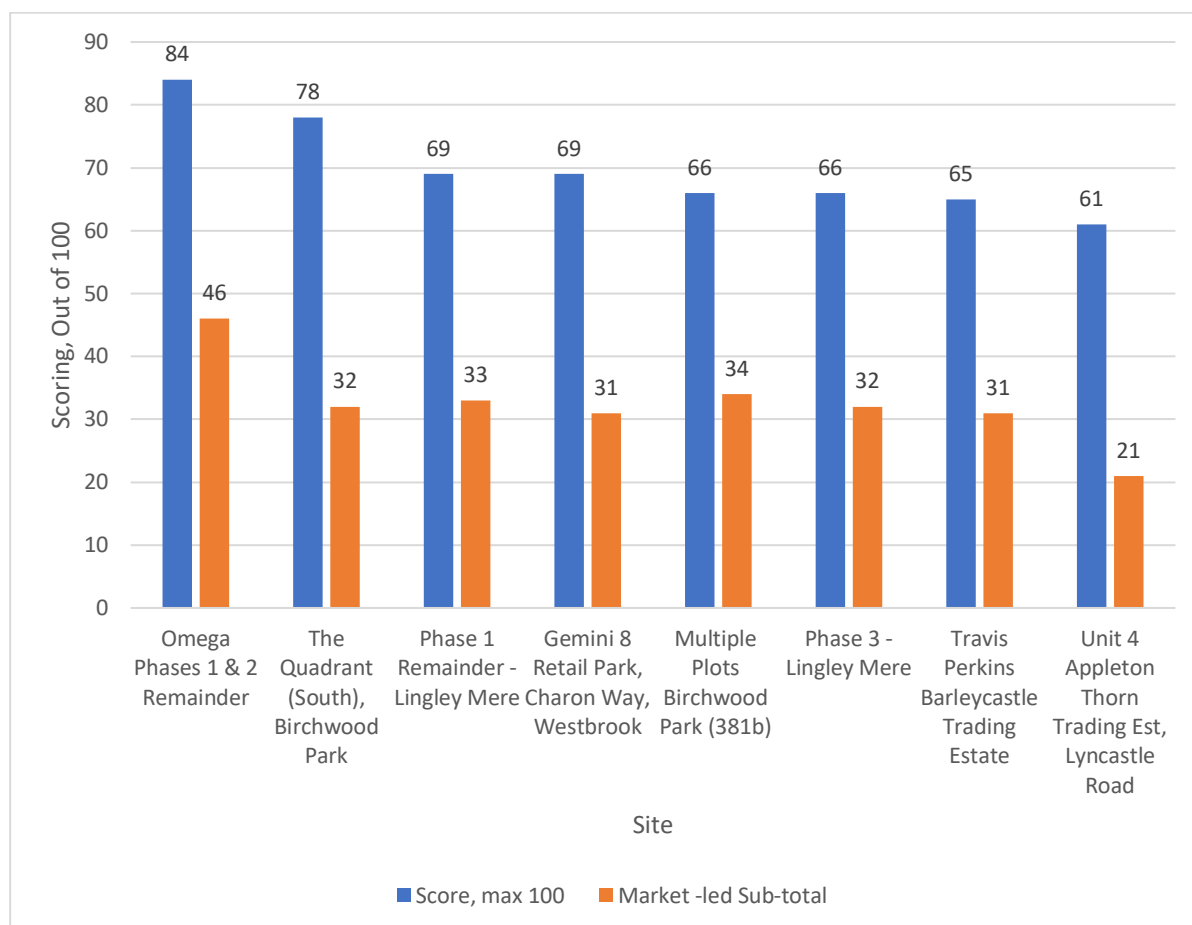
Site Quality

- 4.12 As in the 2016 EDNA and 2019 EDNA Update, 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.

- 4.13 Two scores are provided in Figure 12, 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.

Figure 12 – Employment Sites Scoring (Realistic Supply)



Source: BE Group, 2021

- 4.14 The remaining land at Omega Phases 1 and 2 scores well, reflecting the quality and accessibility of the location. Additionally, the site The Quadrant (South), Birchwood

Park scores well on accessibility, servicing and the fact that it has planning consent and developer partners in place. It is likely to come forward in the short term, which is why it scores better than other land at Birchwood Park.

- 4.15 Unit 4 Appleton Thorn Trading Est, Lyncastle Road scores the lowest out of all the sites. This reflects the sites more challenging features such as poor public transport routes and low level of flexibility onsite. It also reflects the fact that there is, as yet no firm plan as to how the consent would be brought forward. Rather the land is on the market, for sale, with the planning consent. It will be up to the purchaser to determine if and when they want to progress the proposed use.

Other Supply Issues

- 4.16 The supply analysis above endeavours to identify all undeliverable employment sites and particularly those likely to be lost to alternative uses. One further area of identifiable loss in Warrington's B-Class land supply will be in, and around, Warrington Town Centre, where primarily masterplanning proposals would see eight parcels lost to mostly residential schemes (See Table 10).
- 4.17 Thus, the net impact of these policies would be the loss of 19.03 ha of employment land from Warrington's current supply. Of this, the 0.08 ha Palmyra House, Palmyra Square is vacant while replacement Borough Council offices for New Town House, Buttermarket Street (0.82 ha) are now completed at Time Square, if not yet open.
- 4.18 Other space is fully or largely occupied by private businesses, without pre-identified relocation options, and generates further land needs for business relocation, i.e., 18.13 ha would be needed elsewhere to relocate the firms.
- 4.19 Without a detailed company survey, it is not possible to know exactly how the affected companies will behave. However, experience of similar redevelopments elsewhere suggests that businesses displaced will want to stay in the local area where they currently trade, not moving more than 3 km from their current location. All the existing, and potential future, employment land sources in that 3 km radius fall into Warrington Borough (Manor Park and Daresbury, Runcorn being some 4-6 km from the Southern Gateway Area) meaning that the full 18.13 ha displacement need falls on Warrington.

Table 10 – Losses in Employment Land in Warrington Town Centre and the Southern Gateway

Site Name	Site Address	Source	Masterplan Area	Gross Site Area (Ha)	Net Developable Site Area (Ha)	Existing Use	Existing Use Comments
Premier Tankers, Land adjacent Colas, Loushers Lane	Land to the north west of Colas, south east of Priestley College, Loushers Lane, Latchford, Warrington, WA4	Identified for inclusion within the SHLAA via a desktop study. Site has previously been subject to pre-application discussions for residential development.	Southern Gateway (Part Parcels I18 and I19)	2.44	1.83	Commercial	In active use
Wharf Industrial Estate	Wharf Street, Warrington	Identified as a re-development opportunity within Warrington Town Centre Masterplan	Southern Gateway (Parcels I4 and I5)	4.86	3.65	Industrial Estate	In active use
Palmyra House	Palmyra House, Palmyra Square North, Warrington, WA1 1JN	Identified as a re-development opportunity	Cabinet Works (Parcel G3)	0.08	0.08	Offices	Vacant
Dallam Lane (West Side)	Warrington, WA2 7AR	Identified as a re-development opportunity through the Southern Gateway Masterplan	Stadium Quarter (Parcels A1 to A7)	8.07	6.0525	Commercial	In active use
Bankside	Crosfield Street, Warrington, WA1 1UP	Identified as a re-development opportunity within Warrington Town Centre Masterplan	WWDA (Part Parcel K23)	0.37	0.333	Office	In active use
Bank House	Bank Street, Warrington, WA1 2AP	Nominated for inclusion in the SHLAA.	Bridge Street Quarter (Part Parcel B8)	0.12	0.12	Office	In active use
New Town House	Buttermarket Street, Warrington, WA1 2NH	Identified as a re-development opportunity	St Mary's Quarter (Parcel D1)	0.82	0.74	Offices	In active use
Causeway Park	Central Avenue, off Wilderspool Causeway, Warrington, WA4 6QS	Identified as a re-development opportunity through the Southern Gateway Masterplan	Southern Gateway (Part of Parcels I8, I10, I12, and I13)	2.27	1.70	Employment	In active use
Total				19.03*			

Source: WBC, 2021 *See the accompanying text for a further breakdown and analysis of this figure.

4.20 Office businesses occupying the 566 sqm Bank House, Bank Street and the 1,418 sqm multi-let offices of Bankside will likely want other offices in Warrington, rather than land (0.49 ha of land in these two properties). The net need, excluding these properties, is thus **17.64 ha**. Over the long term there are prospects that some of these businesses can be relocated in Central Warrington, with new office space likely at Time Square and in the Stadium Quarter, for example. For the purposes of this study, however, the 17.64 ha represents an additional need to be met.

Summary

4.21 The 2019 EDNA Update identified a realistic land supply of 83.91 ha in 17 sites. This comprised a local supply of 23.94 ha in 13 sites, 28.5 percent of the floorspace total, and a strategic supply of 59.97 ha in four sites at Omega. Updating this assessment to 2021, and excluding land now developed, unlikely to be brought forward, completed for alternative uses or held for specific occupiers suggests a supply figure, as of March 2021, of 38.87 ha in nine sites, comprising:

- Strategic (Omega) supply: 12.7 ha (32.7 percent), one site
- Local Supply: 26.17 ha (67.3 percent), eight sites.

4.22 Over 2019-2021, take up at Omega, combined with the loss of other land to housing, reduced the supply from 59.97 ha to only 12.7 ha, all in Omega South. This comprises the Mountpark Phase II scheme which is under construction and expected to complete by 2022. After that time, both Omega North and South will be complete in terms of strategic employment land.

4.23 Nearly two thirds of the local supply, and all the strategic supply, is likely to be taken up in a 1-5 year timeframe. Only at Birchwood is a significant portion of available and unconstrained land expected to remain available for more than a decade. Table 11 provides a breakdown of the current realistic land supply by B Use Class.

Table 11 – Use Class Assessment (Realistic Supply)

Location	Use Class					Total, ha
	E(g)(i)	E(g)(iii) /B2	B8	E(g), B2, B8	Strategic B2/B8	
Local, Sub-Total	1.15	1.87	5.41	17.74	-	26.17
Strategic (Omega)	-	-	-	-	12.70	12.70
Total, ha	1.15	1.87	5.41	17.74	12.70	38.87

Source: BE Group, 2021

4.24 Masterplanning in Central Warrington will see 19.03 ha of largely occupied employment land, primarily in the Stadium Quarter and Southern Gateway, lost to mostly residential uses. Businesses would be displaced in Warrington Borough and accommodating them locally would generate 17.64 ha. of additional land need, excluding schemes now complete and businesses likely to need office premises, not land.

5.0 REGULATION 18 SITES REVIEW

Introduction

- 5.1 On 10th July 2017 the Council's Executive Board approved the Local Plan Preferred Development Option Regulation 18 consultation documents for public consultation. The Council has undertaken a 'Call for Sites' exercise under Reg. 18, to which 12 responses were received promoting sites for B1/B2/B8 employment and another 40 were promoted for a number of uses, including B-Class Employment. These 52 site responses were reviewed in the 2019 EDNA, with the goal of identifying potential additional sources of employment land in the Borough, to meet OAN. The focus of this review was the ability of sites to meet identified market demand and likely deliverability. The sustainability and other physical/environmental issues associated with sites were considered separately by the Council through the ongoing Local Plan process.
- 5.2 This Section updates the 2019 Reg.18 Sites review identifying any changes in market demand and individual site deliverability which have occurred in the last two years, including, where relevant, the impact of the Covid-19 Pandemic on property market issues. The Section also reviews two additional sites, which have been put forward to the Council since 2019, to meet employment needs:
- Fiddlers Ferry Power Station and surrounding land – 101.0 ha (gross)
 - Six56 Phase II (incorporates elements of the Reg. 18 site R18/152) – 70 ha.

Regulation 18 – Call for Sites Responses Review

- 5.5 The 52 sites, 53 with Fiddlers Ferry (Six56 Phase II includes parts of an existing Reg. 18 site), are appraised against their high-level constraints – accessibility, stated physical issues, etc., 'fit' with identified market demand/ability to fill a defined supply gap and potential ability to deliver premises within the Local Plan period. Please note the specific contribution/lack of contribution of any site to the Warrington Green Belt, where the land falls in the Green Belt, is beyond the scope of this Study and has been considered in other evidence base documents. Based on how well the site performs against these criteria, it is graded A-E. Grades, and resulting recommendations are set out in Table 12.

Table 12 – Grades A to E Definitions

Grade	Definition	Recommendation
A+	<p>Site has no large-scale constraints It is well placed, and of a size, to meet <i>strategic</i> demand and attract inward investment Site is in developer control, or has other strong indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet strategic needs for B/B2/B8 uses, and attract inward investment</p>
A-	<p>Site has some, possibly significant constraints, although these can potentially be overcome with investment It is well placed, and of a size, to meet <i>strategic</i> demand and attract inward investment Site is in developer control, or has other strong indications of deliverability in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed. Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet strategic needs for B/B2/B8 uses, and attract inward investment</p>
B+	<p>Site has no large-scale constraints It is well placed, and of a size, to meet <i>local</i> demand It meets defined market needs in a relevant geographic area Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for B1/B2/B8 uses</p>
B-	<p>Site has some, possibly significant constraints, although these can be overcome with investment It is well placed, and of a size, to meet <i>local</i> demand It meets defined market needs in a relevant geographic area Site is in developer control, or has other indications of deliverability early in the Plan Period</p>	<p>Constraints raise some questions over deliverability but there remains a way forward to development if certain issues can be addressed. Subject to other considerations, site represents a strong candidate for inclusion in the Local Plan to meet local needs for B1/B2/B8 uses</p>
C	<p>Few/moderate site constraints Site could meet some local demand but:</p> <ol style="list-style-type: none"> 1. Delivery of employment uses would be dependent on development of additional uses, likely housing, in a mixed-use scheme, or 2. Size and position mean that it is most likely to support the growth/relocation of a single firm 	<p>Consider for allocation to meet local needs. However:</p> <ol style="list-style-type: none"> 1. If tied to a mixed-use scheme, confirmation that the wider development package is acceptable and deliverable, is required 2. If take up tied to a single firm, it may be preferable to review applications for growth of that firm on a case by case basis through the planning system

Grade	Definition	Recommendation
D	Site constraints What demand exists primarily for lower value uses – waste, open storage, etc. Conversely, higher demand but likely insufficient to overcome site constraints. Moderate evidence that B-Class uses would be deliverable here in Local Plan Period	Low priority for B-Class allocation. Subject to further review may suit other uses.
E	Significant site constraints Location and size offer negligible scope for meeting local demand or supply gaps Significant barriers to delivery	Do not allocate for B1/B2/B8 uses.

Source: BE Group, 2021

5.3 Two amendments to the methodology are made for this 2021 EDNA:

- The introduction of A- and B- Categories – This reflects the fact that there now are some large sites which have significant constraints, but which remain desirable to the market and which are under developer control, with a potential ‘way forward’ as to how those constraints could be overcome
- Two grades are now given, a current grading and potential future grade – The latter is the grade the site could achieve if the identified development plans are realised. As only a few sites have identified development plans, the two grades will only be different in a small number of cases.

5.4 **These changes have resulted in amended grades for a range of sites compared to the gradings in the 2019 EDNA Study.**

5.5 Table 13 provides the main Reg.18 Sites analysis while the two extra sites, Fiddlers Ferry and Six56 Phase II are reviewed in Tables 14 and 15.

Table 13 – Regulation 18 Site Review Summaries

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
R18/048	Land at Arley Road, Stretton	Appleton	B&F Tomlinson (Y)/Fisher German	1.33	Employment Residential	-	Green Belt Incorporates access to adjoining fields Access is via narrow rural road	Although falls within a broad area of market interest, this site sits south of motorway from core demand area of Barleycastle. There are some rural employment uses to south, but constrained nature of Arley Road will reduce attractiveness of location to many operators.	Land may suit some rural businesses but no strong evidence of deliverability of employment uses here	D	D
R18/061, R18/P2/100	Land off Barleycastle Lane ('Swift Site')	Barleycastle	Liberty Properties (N- Prospective Purchaser)/HOW Planning	15.30	Employment – 60,000	Site was subject to an application for a 59,000 sqm logistics facility for the exclusive use of Eddie Stobart (App. Nos. 2017/31757 and 2019/34739). App. Planning Statement give very special circumstances for release of Green Belt to include high economic value of Eddie Stobart to Warrington (730 new jobs created); proximity of existing facilities; new highways contributions and deliverability of site. The applications were recommended for approval by officers but refused at Committee as premature while Green Belt protections remain in place in this area. Those applications were subsequently appealed, with the appeals dismissed in late 2020. It is understood the Eddie Stobart is now looking at alternative locations outside of Warrington Borough	Green Belt Various Grade II Listed buildings in proximity Stream on northern boundary	Desirability of location is evidenced by: • Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in South Warrington and capitalise on its position on the M6/M56 interchange • The critical mass of existing B2/B8 occupiers on the established industrial estates to the west and south, plus prospects for a strategic B2/B8 development to the north • Ongoing expansion of existing firms in Barleycastle and Appleton Thorn, both of which remain a focus for the development of new B2/B8 properties in the Borough • The previous interest of Eddie Stobart in the land. The planning applications for this site were dismissed for Green Belt issues rather than any evidence of a lack of demand here.	Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent local growth and home to a range of major local and regional/national firms. The site was subject to an identified property requirement (Eddie Stobart) and (now refused) application for development. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. Site is large enough to meet either several local requirements or a single strategic operator, reflecting the fact that the wider area meets both local and strategic needs.	A+/B+	A+/B+
R18/106, R18/P2/145	Land at Bradley Hall Farm, Cliff Road - Six56	Barleycastle	Langtree (N- Prospective Purchaser)/ Spawforths (also Pannattoni)	92.00 – Original Reg. 18 Submission	Employment – 288,000	Proposed for 288,000 sqm of B8 of floorspace, delivered speculatively or as Design and Build, in four Zones: • Zone A – 8,919 sqm • Zone B – 144,652 sqm • Zone C – 25,920 sqm • Zone D – 108, 412 sqm Indicative masterplanning is for seven properties. Access would primarily be from J20, M6. The following transport improvements are proposed: • Two new roundabouts onto Grappenhall Lane • The relocation and signalisation of Cliff Lane roundabout • The widening of part of the carriageways to the two M6 J20 dumbbell roundabouts,	Bradley Hall moated site is a Scheduled Monument (SM), is in the site boundary Beyond the northern boundary of the Site (within the triangle of land outside of the Application Site to the south of Cliff Lane) is a residential property and associated outbuilding There is a Grade II* and a Grade II Listed Building located beyond the south of the Site and to the north of Barleycastle Lane (Tanyard Farm Building and Barleycastle Farm House) There are some wooded areas and wooded outcrops within the Site	As noted for R18/061, R18/P2/100 above, stakeholders were clear that with Omega now largely full, South East Warrington is where they expect the new Strategic B2/B8 site for Warrington Borough to be delivered. Its direct motorway access is a key feature, making it more attractive to the market than more isolated sites. More generally the market for larger B2 and particularly B8 premises remains very strong and has only benefited from the growth of e-commerce in 2020/21. The proposal has already generated some occupier interested and partners see no reason why it cannot be delivered by 2027.	Plans for development are well established here. The land is under the control, although not yet ownership, of an experienced developer who is supported by Panattoni a developer with international experience delivering strategic B2/B8. The scheme has financial backing for both land acquisition and delivery. An Outline Planning Application has been submitted and while there is no guarantee this will be approved; it does show an advanced level of planning for both the scheme and associated infrastructure investment.	A+	A+

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
						<p>including partial signalisation</p> <ul style="list-style-type: none"> A new shared pedestrian/cycle route linking the two roundabouts and connecting to the site Funding for public transport services, including a potential new bus link. <p>The site is subject to an undecided outline application (all matters reserved except for means of access) (App. No. 2019/34799) by Langtree for up to 287,909 sqm of employment floorspace including change of use of Bradley Hall Farmhouse to E(g) (i) office use (335 sqm) and associated servicing and infrastructure including works to the M6 J20 dumbbell roundabouts and realignment of the existing A50 junction.</p> <p>The site requires an Environmental Statement (ES), and an ES Amendment was submitted in October 2020 and has been consulted on over winter 2020. Langtree expect a decision on this application in line with the Local Plan development process, in approx. October 2021. It is possible the application will be called in by the Secretary of State, however.</p> <p>Development funding is in place from an institutional investor, who will also fund land acquisition. Langtree are the appointed developers and will deliver the scheme. Panattoni are consulting on matters such as design and marketing but will not directly deliver any of the property.</p> <p>External infrastructure investments proposed in the Six56 application, relate to that development only, although they would benefit the wider area. All funding will come from the development and Six56 is not dependant on any external or public sector funding sources.</p>	There are three designated Public Rights of Way across the Site In Green Belt				

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
						Proposals would be for a development comparable to Omega, focused on the strategic B8 market. The site is receiving interest for units of 25,000 sqm or more. Feel the scheme will let/sell quickly in the current market.					
R18/147 (Part R18/143)	Land South of Barleycastle Lane / North of M56	Barleycastle	Liberty Properties (Previously Morley Estates) (N- Prospective Purchaser)/Roman Summer Associates	9.52	Employment – 40,000	Site under option to developer. Some marketing undertaken for primarily B8 uses. Enquiries received	Green Belt (part) Trees and agricultural orchard on site	Desirability of location is evidenced by: <ul style="list-style-type: none"> Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in South Warrington and capitalise on its position on the M6/M56 interchange The critical mass of existing B2/B8 occupiers on the established industrial estates to the west and south, plus prospects for a strategic B2/B8 development to the north Ongoing expansion of existing firms in Barleycastle and Appleton Thorn, both of which remain a focus for the development of new B2/B8 properties in the Borough 	Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent local growth and home to a range of major local and regional/national firms. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. The scale and position of this site would suit local rather than strategic developments	B+	B+
R18/148, R18/P2/099	Land off Barleycastle Lane ("Donlan Site")	Barleycastle	Liberty Properties (N- Prospective Purchaser)/HOW Planning	9.00	Employment - 35,000	Under option to developer Site available immediately	Green Belt Site Various Grade II Listed buildings in proximity	Desirability of location is evidenced by: <ul style="list-style-type: none"> Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in South Warrington and capitalise on its position on the M6/M56 interchange The critical mass of existing B2/B8 occupiers on the established industrial estates to the west and south, plus prospects for a strategic B2/B8 development to the north Ongoing expansion of existing firms in Barleycastle and Appleton Thorn, both of which remain a focus for the development of new B2/B8 properties in the Borough 	Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent local growth and home to a range of major local and regional/national firms. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. Site is large enough to meet either several local requirements or a single strategic operator, reflecting the fact that the wider area meets both local and strategic needs.	A+/B+	A+/B+
R18/150, R18/P2/098	Land off Barleycastle Lane in Appleton ("Schofield/Sta fford Site 1")	Barleycastle	Liberty Properties (N- Prospective Purchaser)/HOW Planning	6.60	Employment	Strong M6/M56 motorway access Owner supportive	Green Belt Stream on northern boundary Farm adjacent	Desirability of location is evidenced by: <ul style="list-style-type: none"> Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in 	Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent	A+/B+	A+/B+

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
								<p>South Warrington and capitalise on its position on the M6/M56 interchange</p> <ul style="list-style-type: none"> The critical mass of existing B2/B8 occupiers on the established industrial estates to the west and south, plus prospects for a strategic B2/B8 development to the north Ongoing expansion of existing firms in Barleycastle and Appleton Thorn, both of which remain a focus for the development of new B2/B8 properties in the Borough 	<p>local growth and home to a range of major local and regional/national firms. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. Site is large enough to meet either several local requirements or a single strategic operator, reflecting the fact that the wider area meets both local and strategic needs.</p>		
R18/151, R18/P2/097	Land off Barleycastle Lane in Appleton ("Schofield/Stafford Site 2")	Barleycastle	Liberty Properties (N- Prospective Purchaser)/HOW Planning	4.50	Employment	Strong M6/M56 motorway access Owner supportive	Green Belt	<p>Desirability of location is evidenced by:</p> <ul style="list-style-type: none"> Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in South Warrington and capitalise on its position on the M6/M56 interchange The critical mass of existing B2/B8 occupiers on the established industrial estates to the west and south, plus prospects for a strategic B2/B8 development to the north Ongoing expansion of existing firms in Barleycastle and Appleton Thorn, both of which remain a focus for the development of new B2/B8 properties in the Borough 	<p>Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent local growth and home to a range of major local and regional/national firms. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. Site is large enough to meet either several local requirements or a single strategic operator, reflecting the fact that the wider area meets both local and strategic needs.</p>	A+/B+	A+/B+
R18/152	North side of Cartridge Lane	Barleycastle	Now Reviewed Separately as part of the Six56 Phase II option							-	-
R18/066, R18/P2/081, R18/P2/137, R18/P2/144	Land at Joy Lane, Adjoining Finger Post Farm	Burtonwood	V Capital (N- Prospective Purchaser)/PRP Architects	13.50 (11.50 net)	Employment – 5,000 Residential Retail Leisure Other	<p>Extension to Omega North, accessible from J8, M62 (with some local highways improvements) Concept masterplans produced – B2/B8 units of 6,000-25,000 sqm McLaren Construction identified as preferred development contractor partner Screening proposed on areas of land to the north Delivery with five years of allocation estimated</p>	Green Belt Highways access into the site and capacity of J8, M62 Long linier site	<p>Market demand evidenced by the success of the existing Omega site to the south with some 122 ha of employment land take up over 2013-2020, for B2/B8 units comparable to those proposed here. Omega North, in particular, has filled up quickly, including several high-profile occupiers, and now provides a critical mass of existing firms upon which an extension could be based. Market evidence, both from ongoing construction in Omega South and stakeholder comments indicates good ongoing, demand at Junction 8, M62, even with prospects for development at</p>	<p>Land is in a strong location close to J8, M62 and would benefit from the existing critical mass of Omega North. However, the quantum of land proposed here is modest compared to options elsewhere, including proposals West of Omega. The land is also somewhat narrow and while it could support a range of local B2/B8 uses, it could not support a larger strategic scheme. Another constraint would be road access, but is hoped this can be overcome with investment, given the relatively</p>	B-	B+

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								competing locations, and no evidence of slowing demand for logistics, certainly not in the five-year delivery timeframe proposed for this site	short distance between this site and Junction 8, M62.		
R18/080	Burtonwood Brewery and White House Farm, Bold Lane	Burtonwood	Burtonwood Brewery (Thomas Hardy Holdings) (Y)/GL Hearn	3.90	Employment – 6,500 Residential	Previously identified as needed for business expansion – additional beverage packaging facility of 6,500 sqm, generating up to 130 extra jobs. However, the Brewery will be closed by the end of September 2021, with the premises on the market, for sale. It is thus assumed that these expansion plans are no longer relevant.	Green Belt (part) Includes farm and woodland area	Site would meet the specific needs of Burtonwood Brewery only. As noted, the growth plans identified in the Reg. 18 submission no longer appear relevant. No evidence it would meet additional needs.	Delivery was tied to the expansion of the Brewery, an expansion now not likely to happen. It will be for the new owner of the properties to identify if they need expansion land.	C	C
R18/031, R18/P2/131H	Land West of Heath Lane	Croft	Jayne Bradbury (N)/ Cassidy + Ashton Group	1.41	Employment Residential Retail Leisure	Statement: “There is a committed developer on board, working with the land owner. The site can be delivered within the next 1 to 7 years. The developer that we are working with is able to deliver on a mix of uses be it employment, care, housing, retail or leisure.”	Green Belt	Employment property needs in Croft, Culcheth and Glazebury are minor and generally addressed through property conversions/redevelopments only. This area is also served by Birchwood and Taylor Business Park, Culcheth, although this scheme is well occupied, and existing/proposed schemes along the East Lancs Road. No evidence of need for a large new employment area here, at least not of the scale of this land plus the eight sites below which link to it.	Development partner identified. The strongly residential character of area makes it likely that housing will be the preferred use sought here.	D	D
R18/032, R18/P2/131F	Land North of Smithy Brow	Croft	Jayne Bradbury (N)/ Cassidy + Ashton Group	6.07	Employment Residential Retail Leisure	Statement as for Site R18/031, R18/P2/131H above	Green Belt Split site	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/093, R18/P2/131G	Land East of Heath Lane	Croft	Jayne Bradbury (N)/ Cassidy + Ashton Group	3.36	Employment Residential Retail Leisure	Statement as for Site R18/031, R18/P2/131H above	Green Belt	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/098	Land South of Smithy Brow	Croft	Jayne Bradbury (N)/ Cassidy + Ashton Group	3.80	Employment Residential Retail Leisure	Statement as for Site R18/031, R18/P2/131H above	Green Belt	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/099, R18/P2/131E	Land North of Stone Pit Lane	Croft	Jayne Bradbury (N)/ Cassidy + Ashton Group	8.24	Employment Residential Retail Leisure	Statement as for Site R18/031, R18/P2/131H above	Green Belt	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/P2/033	Land at Former Kenyon Railway Junction, Wilton Lane	Culcheth	J. Fallon-Turner Ltd (Y)/ De Pol Associates	5.06 (3.27 net)	Employment – 5,000	Developer owned Proposed for B8 uses with emphasis on open storage Subject of enquiries from parties seeking open storage sites, esp. caravan storage (main use sought) Former rail freight depot (Network Rail), and other open storage uses Prospect for renewal of rail use	Green Belt Site (brownfield) Difficult access onto Wilton Lane Limited vehicle capacity onto Wilton Lane Network Rail easement	Market evidence as for Site R18/031, R18/P2/131H above	Brownfield site, historically used for rail related/open storage, and close to other such uses. Land receiving ongoing enquiries for B8 uses and under developer control. Reuse of this brownfield site is desirable, but ultimate use sought is caravan storage. Unclear if formal allocation in Local Plan, for employment, and removal from Green Belt, is required to achieve this.	D	D

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						Screened by tree cover/topography Separated from settlements by rail line Similar uses, including caravan storage, along Wilton Lane					
R18/033, R18/P2/131B	Land west of Warrington Road and South of Railway Line	Glazebury	Jayne Bradbury (N)/ Cassidy + Ashton Group	8.00	Employment Residential Retail Leisure	Statement as for Site R18/031, R18/P2/131H above	Green Belt	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/063, R18/P2/131 C	306 Warrington Road	Glazebury	Jayne Bradbury (N)/ Cassidy + Ashton Group	0.54	Employment Residential Retail Leisure	Site under option to developer The site can be delivered within the next 1 to 7 years. Residential property (recently developed) and backland	Green Belt Fronted by dwelling, which would need to be cleared to provide access Other housing adjacent, including new build units	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/074	Chapel House Farm, Fowley Common Lane	Glazebury	Jayne Bradbury (N)/ Cassidy + Ashton Group	1.20	Employment Residential Retail Leisure	Site under option to developer The site can be delivered within the next 1 to 7 years	Green Belt (brownfield, partly) Includes existing farm Backland position, with constrained access through residential area	Market evidence as for Site R18/031, R18/P2/131H above	Comments as for as for Site R18/031, R18/P2/131H above.	D	D
R18/P2/104A (Contains smaller R18/104)	Disused Railway Line, North of Station Road,	Latchford	ADS Estates (Y-Part)/Emery Planning	4.86 (net for employment, 0.50 ha)	Employment Residential	Developer owned Brownfield former rail land, vacant for some 30 years Site divided into three areas. Area 1 is the central area between Wash Lane and Knutsford Road and crosses Grammar School Road by way of a sandstone bridge. Area 1 is proposed for 100 apartments, 1,950 sqm of commercial space as well as a small number of terrace and mews properties. Access to this area would be taken from Station Road. Other areas proposed for housing only. All three areas can be developed independently of each other No details provided on commercial element	Linear site Wooded Identified wildlife corridor, scheme would provide mitigation Close to Latchford Sidings Local Wildlife Site Structure of local architectural importance, Knutsford Road Bridge, to be demolished Includes steep embankment Potential contamination Bounded by housing, recreation, school plus some employment south of Station Road (but separated from latter by steep slope)	Latchford not identified in research as an area of major demand for new employment uses. However, Station Road is home to an existing cluster of employment uses and modest scale of B-Class development proposed would be in character with that cluster.	Brownfield land under developer control, but developer commitment to delivering the specific employment element is not evidenced. B-Class delivery here is ultimately dependant on the suitability and deliverability of the wider mixed-use scheme, which must overcome a number of physical constraints.	C-D Dependant on real impact of site constraints	C-D
R18/062, R18/P2/129	Land at Camsley Lane / A56, 57 Camsley Lane	Lymm	Jayne Bradbury (N)/ Cassidy + Ashton Group	1.50	Employment Residential	Statement: "There is a committed developer on board, working with the land owner. The site can be delivered within the next 1 to 7 years. The developer that we are working with is able to deliver on a mix of uses be it employment, care, housing, retail or leisure." Existing residential site, one occupied dwelling – owners	Green Belt House and business on site	In contrast to the 2019 EDNA, stakeholders no longer Lymm as a particular focus for market demand, either for industrial uses, where requirements are focused towards the Motorways, or offices, where interest is focused in Birchwood and to a lesser degree Warrington Town Centre. What interest does exist is likely to be for smaller premises options and rural infill rather than larger developments.	Site developer controlled and in proximity to existing employment uses. However, proposed use appears to be residential infill only.	D	D

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						wish to build five further homes, reflecting historical site density. Car garage to rear – Central Garage					
R18/072, R18/P2/063	Cherry Hall Farm, Cherry Lane	Lymm	The High Legh Estate (Y)/Fisher German	37.60 (28.20 net)	Employment Residential Retail Leisure	Interest from businesses to use the land reported Available 1-2 years from allocation (to clear tenants) Mixed use development of the four uses possible	Green Belt Includes existing farm (partially derelict) Grade 3 agricultural land Partly within buffer zone of Stanlow-Carrington Pipeline Infrastructure issues of this large proposal not understood/reviewed	In contrast to the 2019 EDNA, stakeholders no longer Lymm as a particular focus for market demand, either for industrial uses, where requirements are focused towards the Motorways, or offices, where interest is focused in Birchwood and to a lesser degree Warrington Town Centre. What interest does exist is likely to be for smaller premises options and rural infill rather than larger developments. Land well located on main route between Lymm and Junction 20, M6 close to existing offices/business centre. Local demand would not support a full allocation of 28 ha for employment uses and the focus of strategic requirements is Barleycastle, west of M6. However, it is assumed B-Class uses would form one, possibly small, element of a mixed-use scheme, with delivery proportionate to demand.	Modestly constrained site, which has attracted business requirements in the past. Lack of a current development partners means that a 'way forward' has yet to be established. B-Class delivery here may be dependent on the suitability and deliverability of a wider mixed-use scheme	C	C
R18/081, R18/P2/101	Land at Cherry Lane and Booths Lane	Lymm	Brenrun Ltd (Y)/ Emery Planning	41.00	Employment Residential	Site developer owned Considered for high quality business park	Green Belt Infrastructure issues of this large proposal not understood/reviewed	In contrast to the 2019 EDNA, stakeholders no longer Lymm as a particular focus for market demand, either for industrial uses, where requirements are focused towards the Motorways, or offices, where interest is focused in Birchwood and to a lesser degree Warrington Town Centre. What interest does exist is likely to be for smaller premises options and rural infill rather than larger developments. Land well located on main route between Lymm and Junction 20, M6 close to existing offices/business centre. Local demand would not support a full allocation of 41 ha for employment uses and the focus of strategic requirements is Barleycastle, west of M6. However, it is assumed B-Class uses would form one, possibly small, element of a mixed-use scheme, with delivery proportionate to demand.	Largely unconstrained site, which has attracted business requirements in the past. Developer owned. Unclear if developer would offer the whole site for B-Class use or desire a mixed-use scheme.	C	C
R18/P2/152	Land at Cherry Lane	Lymm	C4 Land (N – Prospective Purchaser)/GTP	54.93 (employment element within a 55.85 site)	Employment Residential	Applicant proposes to develop land Site could be made available immediately or phased as white land for future development Identified advantages of the site are: • "Critical mass"	Green Belt Farms on site Other residential adjacent Ponds on site, stream crosses eastern edge of site (incorporating modest area of Flood Zone 2-3) Land split by Cherry Lane	Sitting to the immediate east of Junction 20, this site can be said to fall into the same area of strategic market demand as the Barleycastle sites to the west. The employment land is at a highly accessible location on Cherry Lane, with immediate access to J20, M6. Stakeholders are clear that with Omega South nearing capacity there remains a need for a new large	Applicant proposes to develop land, but no further information provided on delivery options or infrastructure requirements here. It is also unclear what proportion of any scheme would be for employment and what for housing. Generally, a strong location but lacking any evidence of how,	C – Based on likelihood that any scheme here would be	A-/B- If a more clearly defined development proposal was produced

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						<ul style="list-style-type: none"> Proximity to motorway junctions Few or no physical, legal, access or topographical constraints Genuine deliverability prospects over the plan period Good access to amenities and pool of labour <p>Identified as having strong potential for development as a motorway linked logistics location, reflecting development plans to the west and the success of Omega, other regional schemes.</p>	Infrastructure issues of this large proposal not understood/reviewed	strategic B2/B8 site which is directly accessible to the motorways, to meet ongoing demand. More generally the market for larger B2 and particularly B8 premises remains very strong and has only benefited from the growth of e-commerce in 2020/21.	and for what exactly, it could be delivered. As applicant suggests, it could be considered (although not necessarily safeguarded) for long term growth, post the Local Plan period.	mixed use	
R18/019 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 4690)	Rixton	Jayne Bradbury (N) – Now St Modwen/ Cassidy + Ashton Group	11.30	<p>Employment – 39,550 Residential Retail Leisure</p>	<p>Site under option to developer St Modwen</p> <p>Initial submission and high level masterplan submitted to the Council in March 2021, for this and seven other adjoining Sites. Proposes 47 ha of employment land on these sites surrounding the A57. The intention is for a mix of industrial, logistics and distribution (B2 / B8) uses, totalling 2 million sqft (186,000 sqm).</p> <p>A residential community of 1,300 new homes on 44 ha is proposed in the north eastern areas of the Masterplan. This would directly link to an enhanced Birchwood Station via a new bridge. A new park and ride car park would be provided south of the railway line along with a road link up from the A57. The road link would not extend north into Birchwood, however. Specific station improvements put forward include:</p> <ul style="list-style-type: none"> Rail infrastructure improvements with 'turn-back' facilities for commuter services to Liverpool and Manchester as well as extra platform space to add to existing through lines. Improved and dedicated car parking at the station to support capacity increases for commuter traffic to Manchester and Liverpool. 	<p>Key constraints for wider scheme:</p> <ul style="list-style-type: none"> Employment plots interspersed with nine residential/residential farm properties, all separately owned. Plans do not indicate these will be included in any development but will remain as primarily residential sites. These prevent the employment land from being brought forward as a single coherent location, but rather split it into four plots of 11-17 ha each. While still relatively large plots, this split would prevent the site from accommodating the very largest B8 National Distribution Centres. Additionally, any development would need to reflect the adjacent housing, which may place limits on the scale and nature of any buildings on the site The west and south of the wider development area is in an area of Flood Risk, Flood Zones 2 and 3. However, a comparison, made by St Modwen, between the EA modelled flood 	<p>The employment land is at a highly accessible location on the A57, with immediate access to J21, M6. Stakeholders are clear that with Omega South nearing capacity there remains a need for a new large strategic B2/B8 site which is directly accessible to the motorways, to meet ongoing demand. Stakeholders broadly assume that a development in South East Warrington Borough will meet this need however, the Birchwood and Woolston Grange areas were also identified as desirable and well established locations for meeting both local and strategic needs. This site links well to these established employment clusters, particularly if a direct link to Birchwood/Birchwood Station can be provided.</p>	<p>Strong location, however, the employment land is split into plots by existing road infrastructure, land ownerships and intervening residential/farm properties, which fall outside of the scheme. This makes delivering a single coherent development more difficult and the adjacent housing will likely put limitations on the scale and location of what can be developed here. Both these limitations mean that many of the plots would better suit local rather than strategic schemes</p> <p>Some, but not yet all, land is under the control of an experienced developer. However, plans remain at a very early stage and key questions remain such as whether the sizable road infrastructure required, can be delivered and what the impacts on the A57 and J21, M6 would be.</p>	A-/B-	A+/B+ - If key constraints can be addressed, notably bringing in the intervening residential/farm properties which break up the scheme

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						<ul style="list-style-type: none"> Creation of a transport interchange to facilitate modal shift from cars to rail along with bus links and cycle facilities Improved access to the station building serving both directions including waiting facilities and the potential to deliver complementary retail facilities at the station for its users. <p>St Modwen, possibly with other partners, is able to deliver the infrastructure, employment and housing elements.</p> <p>Development put forward to the Council, but no timetable provided for delivery or when planning applications would be submitted.</p>	<ul style="list-style-type: none"> level data and the site levels suggest that the site is located at higher level than the flood water level. This has been provisionally accepted by the EA. It is broadly assumed Flood Risk can be mitigated across the wider area Investments in Birchwood Station are welcomed by Network Rail/Northern Rail. It is understood that discussions with Highways England/local highways authorities on the prospects for the new road to the A57 and any impacts on J21, M6 have yet to be agreed. All land in Green Belt Includes some higher Grade 1 Agricultural Land Area impacts on SSSI's Would impact on a listed building The agreement of all landowners has yet to be secured on all relevant employment and housing sites 				
R18/020 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 4449)	Rixton	Jayne Bradbury (N) – Now St Modwen/ Cassidy + Ashton Group	15.40	Employment – 54,005 Residential Retail Leisure	Included in wider scheme referenced in Site R18/019 above	<p>Wider scheme constraints as for Site R18/019 above. Plot specific issues are:</p> <ul style="list-style-type: none"> Green Belt Western end of the site is within the Buffer Zone of the M6 Motorway Air Quality Management Area, with the southern end of the site being within the Woolston Eyes SSSI Development Buffer Zone. Public rights of way on several boundaries Site surrounds two homes on Broad Lane frontage Whole site is area of flood risk – Flood Zone 3 	Comments as for Site R18/019 above	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constraints can be addressed, notably bringing in the intervening residential/farm properties which break up the scheme

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R18/021A(P parcel of R18/P2/131A)	Site east of J21, M6 (Site 6919)	Rixton	Jayne Bradbury (N) – Now St Modwen/ Cassidy + Ashton Group	7.60	Employment – 26,600 Residential Retail Leisure	Partly included in wider scheme referenced in Site R18/019 above	Wider scheme constraints as for Site R18/019 above. Plot specific issues are: • Green Belt • Site is within the 500m SSSI Buffer for Woolston Eyes SSSI • Public rights of way on several boundaries • Residential to the east • Site extends south to River Mersey, additional watercourse to the east. Whole site is area of flood risk – Flood Zone 3	Comments as for Site R18/019 above	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constrain ts can be addresse d, notably bringing in the interveni ng residenti al/farm propertie s which break up the scheme
R18/021B(P parcel of R18/P2/131A)	Site east of J21, M6 (Site 8160)	Rixton	Jayne Bradbury (N) – Now St Modwen/ Cassidy + Ashton Group	12.68	Employment – 44,380 Residential Retail Leisure	Included in wider scheme referenced in Site R18/019 above	Wider scheme constraints as for Site R18/019 above. Plot specific issues are: • Green Belt • In Rixton Moss Local Wildlife Site • Site is within the 500m SSSI Buffer for Woolston Eyes SSSI • Public right of way on eastern boundary • Houses, farms and nurseries on several boundaries • Land fronting Brook Lane is an area of flood risk, with watercourse running along western boundary and northern boundary – Flood Zone 3	Comments as for Site R18/019 above	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constrain ts can be addresse d, notably bringing in the interveni ng residenti al/farm propertie s which break up the scheme
R18/022 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 8979)	Rixton	Jayne Bradbury (N) – Now St Modwen/ Cassidy + Ashton Group	5.20	Employment – 18,375 Residential Retail Leisure	Included in wider scheme referenced in Site R18/019 above	Wider scheme constraints as for Site R18/019 above. Plot specific issues are: • Green Belt • In Rixton Moss Local Wildlife Site • Understood to be Grade 1 Agricultural Land • Adjoins a farm and a house in the east • Away from A57, access is via narrow rural roads	Comments as for Site R18/019 above	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constrain ts can be addresse d, notably bringing in the interveni ng residenti al/farm propertie s which break up

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							<ul style="list-style-type: none"> Watercourse running along southern boundary, but outside of flood risk areas. 				the scheme
R18/023 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 8939)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	0.30	Employment – 1,050 Residential Retail Leisure	<p>Applicant comments: The individual parcels of land can be delivered within the next 1 to 7 years. <i>“The site has good highway access and is in a highly sustainable location benefiting from good highway links.”</i> There are no remediation issues. Each of the areas have strong boundaries with existing mature tree lines to minimise the impact of any development. <i>“.. believe that these are deliverable sites and that they could be brought forward as a whole or in part...”</i></p>	<p>Green Belt The whole site is within the 500 metre Woolston Eyes SSSI Buffer Zone Farms, farm buildings and housing surround it on three sides</p>	Parcel is well positioned close to Junction 21, M6/A57 interchange and fronting the A57. However, this plot would only provide a very modest employment opportunity site, while adjacent housing would limit the scale and nature of what could be delivered here.	Parcel at a strong strategic road location. However, its small size, rural position and surrounding housing make it ill suited for most B-Class uses. A small rural office scheme/solus business unit would be the only likely development options. However, given the site's location and constraints, development for non B-Class uses would appear more likely, subject to other planning considerations.	D	D
R18/024 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 9624)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	3.40	Employment – 11,935 Residential Retail Leisure	Statement as for Site R18/023 above	<p>Green Belt The whole site is within the 500 metre Woolston Eyes SSSI Buffer Zone The majority of the site is area of flood risk – Flood Zone 3. River Mersey to south, another watercourse to west. Small pond on southern boundary Farms, farm buildings to the north, blocking current access up to the A57 Public footpath along southern boundary Possible land contamination Narrow, irregular shape in the east.</p>	Unlike other sites in the area, this land is in backlands, fronting the River Mersey. It does not benefit from a position on the A57 as other local plots do.	Individually, parcel appears strongly constrained, being in an area of high flood risk, behind housing and extending south to the River Mersey. It does not appear easily developable, for any use. Could be made more deliverable if linked to St Modwen scheme to the west, but this is not indicated in masterplanning.	D	D
R18/025 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 1833)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	7.50	Employment – 26,460 Residential Retail Leisure	Statement as for Site R18/023 above	<p>Green Belt The whole site is within the 500 metre Woolston Eyes SSSI Buffer Zone Farms, farm buildings to the west The south of the site is area of flood risk – Flood Zone 3. River Mersey to south. Public footpath along southern boundary</p>	Parcel is well positioned close to Junction 21, M6/A57 interchange and fronting the A57. It is large enough to support a reasonable local development. However, there are a range of parcels to the west which are located still closer to J21, M6 and are under developer control which represent a stronger development opportunity.	Parcel sits at a strong strategic road location and would likely enjoy good demand if brought forward. However, high flood risk, adjacent housing and environmental designations would be barriers to delivery. A developer is seeking to progress a number of sites further west which are even closer to the M6 and represent stronger development options.	D	D

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
							Possible land contamination				
R18/026 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 5636)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	9.60	Employment – 33,600 Residential Retail Leisure	Statement as for Site R18/023 above	Green Belt The whole site is within the 500 metre Woolston Eyes SSSI Buffer Zone Pond at centre of site The eastern part of the site is within the Outer Health and Safety Pipeline Zone for National Grid Gas Pipeline 15 Feeder, Warrington.	Parcel is well positioned close to Junction 21, M6/A57 interchange and fronting the A57. It is large enough to support a reasonable local development, or modest strategic one. However, there are a range of parcels to the west which are located still closer to J21, M6 and are under developer control which represent a stronger development opportunity.	Parcel sits at a strong strategic road location and would likely enjoy good demand if brought forward. Constraints are lower than for some sites in this area but would still impact on deliverability and could make delivering viable B-Class uses here challenging. Site may be more viable if delivered for other, higher value, uses, however (subject to other planning considerations). A developer is seeking to progress a number of sites further west which are even closer to the M6 and represent stronger development options.	D	D
R18/027 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 6318)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	1.70	Employment – 6020 Residential Retail Leisure	Statement as for Site R18/023 above	Green Belt The whole site is within the 500 metre Woolston Eyes SSSI Buffer Zone The south of the site is area of flood risk – Flood Zone 2. River Mersey to south. Mature trees on various boundaries. Public footpath along southern boundary Possible land contamination Backland site, no current access north to A57	Unlike other sites in the area, this land is in backlands, fronting the River Mersey. It does not benefit from a position on the A57 as other local plots do.	Backland site, in area of flood risk, by River Mersey. Site would only be developable if parcel R18/026 to north was brought forward, allowing provision of access to A57. Even then, it is more likely that this parcel would be held for environmental mitigation, providing a barrier between any development to the north and the River Mersey.	D	D
R18/028 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 5371)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group <i>N.B. Outside of St Modwen Scheme</i>	1.10	Employment – 3815 Residential Retail Leisure	Statement as for Site R18/023 above	Green Belt Part of the Rixton Moss Local Wildlife Site and wholly within the Rixton Moss SSSI Buffer Zone.	Parcel is close to Junction 21, M6/A57 interchange, and on the A57, although more distant than other parcels in area and isolated from other development plots demand here is likely to be modest compared to larger opportunities further west.	Parcel at a strong strategic road location. However, it is of a small size and, when considered individually, appears marooned in otherwise agricultural area. It is ill suited for most B-Class uses. A small rural office scheme/solus business unit would be the only likely development options. However, given the site's constraints, development for non B-Class uses, if anything, would appear more likely, subject to other planning considerations.	D	D
R18/030 (Parcel of R18/P2/131A)	Site east of J21, M6 (Site 3174)	Rixton	Jayne Bradbury (N)/ Cassidy + Ashton Group	6.10	Employment – 21,490 Residential Retail	Statement as for Site R18/023 above	Green Belt Site is part of the Rixton Moss Local Wildlife Site and also part	Parcel is close to Junction 21, M6/A57 interchange, although more distant than other parcels in area and in backland position some distance from the A57 and accessible via a minor road.	Rural parcel accessed by narrow roads from A57 and lacking A57 frontage. Development here would not be possible without considerable	D	D

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
			<i>N.B. Outside of St Modwen Scheme</i>		Leisure		within the Rixton Moss SSSI Buffer Zone. Farm to south west Pylons cross site, pylon tower in approx. centre of site Access via narrow rural roads	Demand for this plot likely to be modest compared to other opportunities to the west.	investment in improving the local road infrastructure and junction with the A57 Electricity pylons pass through centre of the site. Any requirement to relocate them would add sizable costs to any scheme, impacting on viability. If retained, the pylons would reduce the net developable area. Site appears very challenging to deliver compared to opportunities further west.		
R18/077	Land to South of Birchwood Train Station, Moss Lane	Rixton	Jayne Bradbury now St Modwen(N)/ Cassidy + Ashton Group	19.00	Employment – 66,600 Residential Retail Leisure	Included in wider scheme referenced in Site R18/019 above – However this plot proposed for housing	Wider scheme constraints as for Site R18/019 above. Plot specific issues are: <ul style="list-style-type: none"> • Green Belt • Access via narrow rural roads • Some of the western part of the site is in the Buffer Zone for the M6 Motorway Air Quality Management Area (AQMA). • Part of the site is within the Health and Safety outer National Grid Gas pipe line zone. • Flood risk – Flood Zone 3 • Surrounds farm, other farms nearby 	Land now proposed for housing in a wider scheme.	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constrain ts can be addresse d, notably bringing in the interveni ng residenti al/farm propertie s which break up the scheme
R18/135	Statham Meadows	Rixton	St Modwen (N) Turley	12.50	Retail Leisure Park and Ride	Now partly included in wider scheme referenced in Site R18/019 above	Wider scheme constraints as for Site R18/019 above. Plot specific issues are: <ul style="list-style-type: none"> • Green Belt • The whole site is within the 500 metre • Woolston Eyes SSSI Buffer Zone • Western part of the site is in the Buffer Zone for the M6 Motorway Air Quality Management Area (AQMA). • Site in is area of flood risk – Flood Zone 3. River Mersey to south. Other watercourses on site • Mature trees on site. • Public footpath along southern boundary 	Comments as for Site R18/019 above	Comments as for Site R18/019 above	A-/B-	A+/B+ - If key constrain ts can be addresse d, notably bringing in the interveni ng residenti al/farm propertie s which break up the scheme

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
R18/P2/015 A and B	Land South of Hatton Lane	Stretton	Wallace Land Investments (Y-Part)/iceni	3.29 (employment element within a 26.96 site)	Employment Residential	Proposed for housing led development and new neighbourhood Wallace work with developers to deliver residential/mixed use sites – not clear if a development partner is secured for this site Land South of Hatton could be phased for delivery at the same time as the land controlled by Wallace at Junction 10, M56 in Stretton (see below) in the first five years of the plan period. <i>"This site should be seen, along with Land at Junction 10, M56, Stretton as one of the key enabling sites to deliver the initial highway infrastructure to access the Garden City Suburb."</i> Various services surrounding Accessible from A49 Tarporley Road and Hatton Lane	Green Belt Grade 2-3 agricultural land	Market evidence, including comments of multiple property market stakeholders in 2016, 2019 and 2021 EDNAs and this study on the desirability of further development in South Warrington and capitalise on its position on the M6/M56 interchange. Demand is for the full range of B1/B2/B8 uses but focus at Barleycastle is expected to be larger B2/B8 uses, thus provision of some local employment sites in South Warrington would also be desirable, Strong location at Junction 10, M56 and off A49. Other local uses, including hospital, may generate property requirements from supporting companies, which could be met here.	No development partner in place, but part owner Wallace Land Investments has experience in marketing sites for development. Current proposals allow for 3.29 ha of serviced land in a wider scheme, but do not plan for the specific development of that plot. Thus, separate delivery planning is needed for the employment element of the scheme. B-Class delivery here is ultimately dependant on the suitability and deliverability of the wider mixed-use scheme.	C	C
R18/P2/015 A and B (incorporating R18/088)	Land off Junction 10, M56	Stretton	Wallace Land Investments (Y-Part)/iceni	4.00 (employment element within a 39.20 site)	Employment Residential	Proposed for housing led development and new neighbourhood. Will provide serviced land for employment (but not develop directly) Incorporates land identified as providing the priority Strategic Road vehicular access to the Garden City Suburb off the A49 and onto Stretton Road Various services surrounding Accessible from A49 Tarporley Road and Stretton Road	Green Belt Grade 2-3 agricultural land One Grade II Listed building to north of site/Roman Road adjacent Within SSSI Impact Risk Zone TPOs on site Within Nitrate Vulnerable Zone	Market demand as for site R18/P2/015 A and B above.	No development partner in place, but part owner Wallace Land Investments has experience in marketing sites for development. Current proposals allow for 4.00 ha of serviced land in a wider scheme, but do not plan for the specific development of that plot. Thus, separate delivery planning is needed for the employment element of the scheme. B-Class delivery here is ultimately dependant on the suitability and deliverability of the wider mixed-use scheme.	C	C
R18/136	Land Thelwall Lane East	Thelwall	Peel Holdings (Y)/Turley	4.24	Employment Residential Other	Site developer owned Various industrial uses to west, primarily Novelis. Accessible off Thelwall Lane	Green Belt (brownfield) Flood Risk – Flood Zone 3	Section of scrubland adjacent to a low quality, but broadly successful local Employment Area which includes larger employers (Novelis) that has expanded recently, and open storage sites. Land would support further such uses but backland nature and limited access mean it is unlikely to be attractive to higher value uses.	High flood risk would be a barrier to significant development here.	E	E
R18/137	Land Thelwall Lane West	Thelwall	Peel Holdings (Y)/Turley	1.70	Employment Residential – 10-50 units	Site developer owned Most land on short term leases for open storage.	Possible contamination from past/ongoing uses Flood Risk – Flood Zones 2- 3	Site comprises areas of brownfield land, some currently used for open storage/vehicle parking, close to Latchford Locks. Again, links to low quality, but broadly successful local Employment Area which includes larger employers (Novelis), and open storage sites.	Much of site already in B-Class use. However, high flood risk would be a barrier to significant further major development here.	E	E

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
								Land would support further such uses but limited access mean it is unlikely to be attractive to higher value uses.			
R18/P2/009	Land to the East and West of M6, Massey Brook Farm, Weaste Lane	Thelwall	W Mather (Y)/Acland Bracewell	24.20	Employment Residential	Four parcels of agricultural land separated by Weaste Lane/Massey Brook Lane and the M6 On southern edge of Lymm and representing a logical extension to settlement Bulk of land, some 20 ha, is to west of M6 and could accommodate a large 'mixed-use' development zone (strategic site). Location is accessible to services Existing access off Weaste Lane Immediately available. Could come forward as a single scheme or as a phased development, as part of a masterplan	Green Belt Farm on site Main River (Massey Brook) passes through site, plus other waterbodies Various small areas of woodland on site Location split into four parcels by main roads/motorway Adjacent uses include Care Homes	Rural location, distant from existing employment land and presently accessible only via narrow rural roads. Location does not link strongly to any areas of demand for employment uses.	Delivery method for employment uses here not established. Emphasis appears to be on housing.	D	D
R18/87	Land at Stanley Street	Warrington Town Centre	Chesro (Y)/ De Pol Associates	0.05	Employment – 1,700 sqm E(g) (I and ii) Residential	Brownfield, used as car parking Site now has a resolution to grant Outline consent for an "8 storey building for up to 39 apartments (3, three-bed; 11, two-bed and 25, one-bed apartments); and circa 112 sqm commercial use (Use Class E) on the ground floor, with associated infrastructure and ground works". (App. No. 2020/37959) It is assumed the ground floor use would be retail, leisure or hot food. The site is now on the market, for sale, for a residential development.	Small tightly defined site overlooked by Telephone Exchange building Protected trees adjacent Conservation Area adjacent Electricity sub-station located on a small part of the site.	Small infill site in Town Centre, bounded by other office uses. The proposed use here is housing, however.	Offices represent a logical use for this site, given surroundings However, proposals are now for a primarily residential scheme.	D	D
R18/121	Land at Arpley Meadows, Eastford Road - Warrington Commercial Park	Waterfront	Peel Holdings (Y)/Turley	33.00 – Current Estimate of Commercial Park Developable Area	Employment Residential Leisure	The Warrington Commercial Park is proposed for some 900,000 sqft (84,000 sqm) of floorspace including a number of larger units suitable for B1/ B2 /B8 uses as well as small / medium industrial, commercial, leisure units, office buildings and complementary uses reflective of the Site's relationship with the Western Link Road and the remainder of the wider Warrington Waterfront development. The Commercial Park will be delivered to market by Peel Land and Property; depending on the final form and uses it may either be developed	Green Belt (brownfield) Landfill site Various waterbodies on site Moss Wood Nature Reserve adjacent Not in flood risk area, but surrounded by Flood Zone 3 land Several hazardous pipelines cross the Commercial Park site. These are allowed for in development planning	Falls within wider Warrington Waterfront. Will not attract market interest until Western Link is completed. The Commercial Park would comprise an industrial estate of more mixed large and small/medium industrial and commercial uses. Although not identified as a strong market priority by stakeholders, compared to motorway linked opportunities, the scheme would benefit from links to existing and proposed facilities in the Southern Gateway area. It could usefully provide smaller business space to offset the focus on strategic B2/B8 options elsewhere.	Dependant on major infrastructure investment so unlikely to be brought forward till later in the Local Plan Period. Sitting on the frontage of the Western Link, the site would enjoy a locally prominent position but one distant from the motorway junctions which are the focus of strategic market interest. Site is physically separate from Port Warrington and appears in a more easily deliverable location. However, it is unclear if any cross funding is required to or from this development to Port	B-	B+

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
						in-house or delivery partners will be brought in. Timetables are not established for the development of either site	Access dependant on new highways route/bridge		Warrington, or other Peel schemes, to ensure its delivery and mitigate constraints.		
R18/133	Port Warrington	Waterfront	Peel Ports (Y)/Turley	60 – Based on masterplanning	Employment	<p>Infrastructure In 2010, the site received consent to infill the land to the east and re instatement of a rail freight line, along with an extended canalside berth and other ancillary infrastructure (App. No. 2009/15222). This has been partially implemented by way of the infilling of the site to establish ground levels for the open storage area. However, to date, the rail freight connection has not been delivered and the canal berth has yet to be reinstated and extended. The Western Link route does not include a planned link into Port Warrington. It would be a requirement that an additional link would be needed to be connected to the Western Link to service Port Warrington, should it be brought forward for development. This would need to pass through intervening wetland areas associated with Moore Nature Reserve and Country Park. Warrington Commercial Park would directly front the Link</p> <p>Development Proposals A port expansion option which would result in a further 60 ha of land being developed for a multi-modal ports and logistics hub, in addition to the 15 ha of already operational land. The scheme would be brought forward on a phased basis subject to planning permission and occupier / market demand, with Peel as the main developer. It is envisaged that the whole proposal would be delivered during the Plan period to provide in the region of 2 million sqft (186,000 sqm) of mostly B2/B8 premises. Development could include a number of specialist facilities including new manufacturing and assembly, logistics, industrial processing, storage (bulk liquids) and distribution uses. Development would, in</p>	<ul style="list-style-type: none"> • We are aware that the Council's Transport Officers have concerns about the capacity of the Western Link to support this scheme • Large portions of the site fall into Flood Zone 2 • Moss Side Farm Local Nature Reserve and Upper Mersey Estuary Local Wildlife Site to the west and south west. Undeveloped areas of the site mostly comprise woodland and some wetland areas • Some listed buildings on the site • Several hazardous pipelines cross the Commercial Park site. These are allowed for in development planning • In Green Belt (part), part brownfield • Areas previously used for sand extraction • Landfill adjacent • Historic contamination 	<p>Port Warrington is an established infrastructure component in Peel's strategic plans for the wider Manchester Ship Canal, one of several such Ports proposed/under development.</p> <p>Development here will be for relevant multi-modal logistics, assuming the consented rail link to the established West Coast Main Line is delivered as well as the Western Link and access. Such a facility would be unique in Warrington, with other strategic B8 proposals being only accessible by road. Its unique nature means it is difficult for stakeholders to identify what scale of demand might exist for an enlarged port on the Ship Canal as enquiries for this facility would not necessarily come through traditional commercial agents. It is noted that the scheme would build upon an existing small port facility, of some 15 ha which has successfully attracted several major logistics operators such as Norbits Dentressangle. Equivalent schemes, elsewhere on the Ship Canal also appear to be performing well, such as Port Salford which is now home to Culina and several other occupiers. 60 ha of employment land would represent a comparatively small multi-modal facility, with equivalent schemes elsewhere typically providing 100-150 ha of net development land. The size and linier shape of Port Warrington will place some limits on the scale and nature of strategic development which can be delivered here. From the perspective of road access, the site is some 2 miles from the nearest motorway junction, making it less attractive to occupiers for whom immediate strategic road access is a priority.</p>	<p>Long established strategic proposal, part of the wider Ship Canal growth strategy and building on a modest pre-existing facility. Development will be driven forward by Peel. It would represent a unique facility for Warrington and provide opportunities to bring in port and rail linked operators who would not otherwise consider Warrington as a growth option. However, the scheme is dependent on a great deal of infrastructure investment, as well as overcoming a range of constraints.</p> <p>Some concerns have been raised about the capacity of the Western Link Road to support the scheme. This would be particularly true if the scheme became more dependent on road transport over rail/Canal transport. The Council and other bodies would therefore, if progressing this scheme, need to secure agreements that the rail/canal links will in fact be delivered and would take a high proportion of the traffic generated</p> <p>While the developer has the experience and resources to achieve this, development is likely to be a long term process, extending to later in the Local Plan process and likely beyond. The size, shape and distance from the strategic road network may also make it less attractive to some strategic operators and may mean it attracts more local/sub-regional market interest in practice.</p>	A-/B-	A+/B+

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade	Potential Future Grade*
						part at least, use existing permitted development rights on part of the site.					
R18/069	Land at Gullivers World, off Shackleton Close	Westbrook	Gullivers World Ltd (Y)/DE Pol Associates	26.00 (10.00 net)	Employment Leisure Other (Hotel, Non Residential, Assembly and Leisure)	Comprises existing theme park, hotel, museum Site developer owned Existing consents to expand leisure facilities by 1 ha Gullivers World seeking allocation for a future development option comprising: <ul style="list-style-type: none"> E(g) (i) Offices E(g) (ii) Research and development C1 Hotel/overnight tourist-visitor accommodation D1 Day nursery; crèche and museum (existing) D2 Assembly and Leisure, inc. amusement park 	Minor contamination TPOs on site, already managed, would be unaffected by scheme	Westbrook is not identified by stakeholders or via past transactions as a desirable location for offices, with large scale demand focused at Birchwood and in the Town Centre. Existing sites in the area, including Gemini 8, are being taken up for industrial uses or lost to retail, leisure and housing.	Proposals are for the future redevelopment/ growth of Gullivers World for primarily leisure uses. Any B-Class employment within that redevelopment/ growth is likely to be modest and its appropriateness should be dealt with through a specific planning application rather than a broader Plan Allocation.	D	D
R18/045	Land North of Townsfield Lane	Winwick	Simon Gleave (Y)/DPP	1.20 (0.9 net)	Employment Residential Leisure Other (Healthcare)	Enquiries received on site Currently car parking/recreation	Green Belt (Brownfield, partly) Would need access onto dual carriageway Various buildings on site Arbury Court care facility adjacent	Market evidence suggests healthy demand for E(g)/B2/B8 uses remains in North Warrington, but that the focus of demand remains on the M62 Corridor, at Junctions 8 and 9, building on the critical mass of existing accommodation south of the M62. Winwick area not identified as having a particular need for business accommodation against M62 locations with greater critical mass of exiting premises to the east and west. What could be delivered on this small site would be modest however, and may be of a scale in line with local demand.	Good quality, largely unconstrained site. Main issue is likely to be provision of access for common area onto the dual carriageway. A viable development would likely include surrounding plots in a common scheme Land subject to enquiries but does not have a developer partner in place. 'Way forward' for development still to be agreed.	C	C
R18/046	Land South of Townsfield Lane	Winwick	Simon Gleave (Y)/DPP	2.00 (1.5 net)	Employment Residential Leisure Other (Roadside services)	Enquiries received on site Currently Bar Boot site	Green Belt Would need access onto dual carriageway Arbury Court care facility adjacent	Comments as for site R18/045 above.	Comments as for site R18/045 above.	C	C
R18/P2/127A	Land west of Delph Farm	Winwick	Delph Farm Estates (Y)/ Berrys	37.63 (27 net)	Employment Residential Leisure Other	Enquiries received on site The site would be marketed for freehold and leasehold development. Indicate land could be made available with a year The southern part of the site (phase 1 -13.3 ha) is promoted as a suitable extension to the Winwick Quay Business Park (on opposite side of M62) available for immediate development. The central part of the site (phase 2) and northern edges (phase 3) are promoted for	Green Belt (part) Ponds onsite Group TPOs Electricity pylons cross the site Modest site contamination Some grade 2 agricultural land One listed building in wider area	Market evidence suggests healthy demand for B1/B2/B8 uses in North Warrington, linked to Junction 9. However, this site is more indirectly linked to junction than sites to the east. Identified as possible expansion for Winwick Quay Business Park, which is a successful local employment area, albeit with an increasing emphasis on trade uses and on the opposite side of the M62. However, it is unclear if Mill Lane could support significant traffic increases to permit such a link. In addition, while hospital may generate some property requirements, the focus of this area is generally residential.	Land broadly unconstrained, although links to employment uses to south are questionable. Physical constraints appear sizable although the scale of wider development may generate sufficient value to address them. Land subject to enquiries but does not have a developer partner in place. 'Way forward' for development, infrastructure provision, etc. still to be agreed.	C-D	C-D

Ref	Site Name/ Address	Settlement	Respondent (Site Owner Y/N)/Agent	Size, ha	Proposed Use(s) – Est. Employment Capacity, sqm (where stated)	Comments	Constraints	Market 'Fit'/Supply Gap Filled	Deliverability	Current Grade Grade	Potential Future Grade*
						employment, health-related (hospital adjacent) and residential uses The timescales for development are estimated at: <ul style="list-style-type: none"> Phase 1—years 1-5 Phase 2—years 6-10 Phase 3—years 11-15 					
R18/P2/127B	Land east of Newton Road	Winwick	Delph Farm Estates (Y)/ Berrys	7.50 (6.37 net)	Employment – 21,500 Residential Leisure Other (Healthcare)	Enquiries received on site The site would be marketed for freehold and leasehold development. Indicate land could be made available with a year, and brought forward in first five years of the Plan Promoted as a suitable extension to the Winwick Quay Business Park (on opposite side of M62) available for immediate use	Green Belt Arbury Court care facility adjacent Some grade 2-3 agricultural land Would need access onto dual carriageway	Comments as for site R18/045 above.	Comments as for site R18/045 above.	C-D	C-D

Source: BE Group, 2021

*Based on known plans for site delivery as of March/April 2021

Table 14 - Fiddlers Ferry Site Review

Introduction/Stakeholder Comments
<p>Site owned by SSE/ SLR are Agents/Consultants Fiddlers Ferry Masterplan developed in Jan/Feb 2021. This identified the following development quantum across two phases of the masterplan within the life of the Local Plan: Phase 1 (North of the Railway Line) 2021-2031:</p> <ul style="list-style-type: none"> • 1,000 residential units • 89.68 ha (4 million sqft/ 370,000 sqm) employment land. <p>Phase 2 (South of the Railway Line) 2031 -3036</p> <ul style="list-style-type: none"> • 1,120 residential units <p>Employment Land Split, north of the Railway Line:</p> <ul style="list-style-type: none"> • Main Power Station Site (Site A) – 55.72 ha (2.34 million sqft/ 217,000 sqm) • Coal Yard/NW Area (Site B) – 33.96 ha (1.45 million sqft/ 135,000 sqm). <p>In July/August 2021, Agents for Fiddlers Ferry indicated an increased site size of 109.4 ha. From this, 8.4 ha of existing National Grid infrastructure, that will be retained, can be excluded. This leaves a gross area of 101.0 ha and a net area of 89.68 ha.</p> <p>Timeline Masterplanning identifies two scenarios for development timeline, based on the housing delivery rate:</p> <ul style="list-style-type: none"> • 2021-2040 Option One Standard Market Scenario – 120 dwellings/year • 2021-2036 Option Two Accelerated Market Scenario – 220 dwellings/year. <p>Employment led development north of the railway line (Phase One), to be delivered over 2021-31:</p> <ul style="list-style-type: none"> • 2023 – OPA/EIA Statement • 2024/5 – Phase One Reserved Matters Planning Application • 2024 – Demolition complete and sites ready for occupation • Late 2023/24 – Employment land released for development by third party developers. Coal Yard likely to be the first to come forward, followed by the Power Station Site. <p>It is noted that full decommissioning and clearance of the power station could take up to seven years from an approx. start date of spring 2020, based on experience elsewhere. Thus, to meet the identified timetable it is assumed employment land will come forward on a phased basis, with the 56 ha Power Station Site possibly not fully available till 2027. If that proves the case, the masterplan assumption that the full completion of the employment land will occur by 2030 seems very ambitious, with completion in the 2030s more likely.</p> <p>Overall, SLR expect 70-80 percent of the employment development to be for larger B8 including some major national occupiers, similar to Omega and Logistics North. Will include some smaller industrial/warehouse units, to meet local needs though. Development requires securing development partners for delivery. Access would be via the A562, west to the A557 in Widnes and then north to J7, M62. This is identified as consistent with highways planning in Warrington and Halton.</p>
Site Constraints
<p>Extensive site clearance and mitigation of contaminated land required. It is assumed the full mixed use development will be required to fund this Small area in north west within HSE COMAH zone relating to chemical works in Widnes. SLR indicate the development will have manageable impacts on the highways network of Warrington and Halton, however, this still needs to be confirmed by the relevant highways authorities. It is understood the development may generate a requirement for further investment at J7, M62 Stakeholders identify the site's distance from the M62, some 5 miles via main A-Roads, as a reason why this site would be less attractive to other strategic development options put forward Land east of Power Station and south of Railway Line is in Green Belt. All employment land is outside of Green Belt, however, and on brownfield land Development land falls outside of flood risk areas for River Mersey</p>
Market 'Fit'/Supply Gap Filled
<p>The initial proposal is for a strategic B2/B8 scheme, similar to Omega, with an ancillary element of smaller E(g)/B2/B8 uses for the local market. With Omega expected to be complete by 2022, there is a need for new sites large enough to meet the strong and growing market for strategic B2/B8 uses in Warrington. However, stakeholders felt that locations on the motorway junctions were the priority, with a focus on South East Warrington. Located some five miles from the M62, Fiddlers ferry would struggle to compete for major requirements with nearby locations which enjoy direct motorway access, including Six56, a western expansion of Omega and other schemes proposed in St Helens. Given this constraint, greater demand may come from the local market, with the scheme linking as much to the economy of Widnes as Warrington. With this in mind it is noted that progress on B2/B8 developments in the</p>

Introduction/Stakeholder Comments
adjacent Widnes Waterfront has been very slow although a scheme on Gorse Lane is now progressing. More generally, however, stakeholders identify a very strong market in Warrington for local industrial and warehouse options, with many businesses progressing growth plans that were on hold in 2020. Requirements can extend up to 10,000 sqm each so there is a need for sites which can accommodate these larger local properties, as well as still larger strategic options.
Deliverability
Masterplan in place for delivery, backed by single site owner. No development partners in place, but good initial interest from industrial/warehouse developers is noted, exceeding the interest from housebuilders at this time. Given the strong market for B2 and B8 premises in Warrington, from both local and strategic occupiers, noted by stakeholders, it is not anticipated that securing development partners will be a particular issue.
It is likely that the employment uses will be dependent on the housing to provide an element of cross funding, particularly to support the large site clearance and remediation costs. Thus, regardless of the stated masterplan timetable, it is likely that at least some of the housing will need to be developed before the employment and that the wider scheme will not be viable without a certain quantum of housing. As the housing is to be developed on Green Belt, releasing the Green Belt land will likely be key to delivery of the brownfield land.
The site has good A-Road access but its distance from the M62 makes it less desirable to major logistics occupiers than other locations which enjoy direct motorway access. This weaker position will likely have some impacts on the speed at which B2/B8 options are taken up but and may mean that demand from local firms outweighs demand from strategic businesses. Given the constraints on demand, and the time it could take to fully decommission and clear the power station, it is unlikely the employment site will be fully developed by 2030, as stated in masterplanning.
Current Grade
A-/B-
Potential Future Grade
A+/B+ - Assuming identified constraints can be addressed

Source: BE Group, Stakeholder Comments, 2021

Table 15 – Six56 Phase II Site Review

Introduction/Stakeholder Comments
11 private owners. Most, but not all, title documents indicate an Option agreement with Langtree. Langtree are developers, supported by Panattoni and funded by an institutional investor. Land comprises the 'Village C' housing site of the Garden Suburb. However, if the housing numbers were reduced here, Langtree would look to deliver a second phase of Six56 here. Two options have been suggested by Langtree: <ul style="list-style-type: none"> • Option 1 extends development up to Broad lane to the west and therefore includes land controlled by Taylor Wimpy (adjacent to Broad lane). • Option 2 utilises a hedge boundary as its western edge and excludes the Taylor Wimpey land. <p>These would deliver a maximum of 70 ha (gross) of further employment land. The proposal is for strategic B8 options, as with the original Six56 with the prime access being from J20, M6 and benefiting from the improvements to the J20/A50 roundabout delivered by the original Six56 scheme. This scheme could commence after completion of Six56 Phase One.</p>
Site Constraints
<ul style="list-style-type: none"> • Development assumes this land will not be required for housing • Complex ownership, although developer appears to have options on a majority of the land. The duration of these options is unknown, however, and they may need to be renegotiated by the time the option is brought forward particularly if they relate to housing development, not employment • If the owners are expecting to sell their land for housing, at high values, they may be unwilling to accept lower values for a B2/B8 development. However, at the time of writing, land values for strategic B2/B8 uses are comparable to those for residential uses, further illustrating the high demand for such uses • Adjacent housing, fronting Cartridge Lane, although some mitigation separating these from development is proposed • Woodland on site, some of which would be outside of the development • In Green Belt
Market 'Fit'/Supply Gap Filled
Market comments for Six56 Phase I, noted above also apply here, namely that stakeholders were clear that with Omega now largely full, South East Warrington is where they expect the new Strategic B2/B8 site for Warrington

Introduction/Stakeholder Comments
Borough to be delivered. Its direct motorway access is a key feature, making it more attractive to the market than more isolated sites. More generally the market for larger B2 and particularly B8 premises remains very strong and has only benefited from the growth of e-commerce in 2020/21. The strong B8 market is not identified as a short term trend and with a large, and increasing, portion of commercial activity now undertaken online, strategic requirements are expected to continue after the mid-2020s, and the completion of Phase I. Phase II would provide the opportunity to continue and build upon the momentum and critical mass of development created by Phase I.
Deliverability
As noted, the land was previously proposed for housing, so this analysis assumes it is no longer needed for residential uses. Site is largely/fully under developer control and that developer has the backing of an institutional investor to fund the project. Proposals remain indicative however, with no detailed masterplanning on the scale of development can be delivered here, how it will be accessed and what further infrastructure investment will be needed, both on an off-site. Further investigation of these will be needed before any Local Plan allocation can be supported.
Current Grade
A-
Potential Future Grade
A+ - Assuming no major constraints emerge which cannot be addressed.

Source: BE Group, Stakeholder Comments, 2021

5.9 Against identified OAN needs of 277.39 ha to 2038 (Strategic/Local Take Up Trend, see Section 7.0 of the Main Report) the relevant Call for Sites submissions, and proposals from owners/developers, updated to April 2021, would provide 776.30 ha of potential land (using net figures or the specific B-Class allowances in mixed-use options, where these are given). Within that, Sites graded A+-B- can be said to represent realistic options for employment land supply, measured against market and deliverability criteria. Within these sites, the following can be noted:

- Only one site receives an initial A+ grade meaning it has limited constraints and could be made available almost immediately, subject to planning, to meet primarily/exclusively strategic needs. This is the **92.0 ha (gross)** Land at Bradley Hall Farm, Cliff Road (Six56) scheme, where development planning for a strategic B2/B8 scheme is at an advanced stage
- **44.92 ha (gross)** of land, in six sites, represents relatively unconstrained land around Barleycastle Lane, Barleycastle which could be developed for a mixture of local and strategic schemes and is graded A+/B+, or just B+. This land is under developer control and could be brought forward immediately, again subject to planning, to extend the active industrial estates adjacent
- Other A and B graded sites are graded A- and/or B-, this reflects the fact that they have a number of constraints capable of inhibiting development and planning to mitigate these constraints is incomplete at the time of writing. In all cases, there are 'ways forward' which could transform those A-/B- grades into A+/B+ Grades
- The only A- Graded option is the Six56 Phase II of some **70.0 ha (gross)**

which enjoys the same locational advantages as Phase I and is also partly/fully under developer control. However, there has been no planning yet as to the traffic, etc. impacts a second strategic development in this area might have

- **244.68 ha** in nine sites comprises land graded A-/B- including Fiddlers Ferry (101 ha), Port Warrington (60 ha) and seven sites in Rixton, proposed for a linked development by a single developer, which provide 83.68 ha of gross land and some 47 ha net
- **44.50 ha** in two sites is graded B- and could be developed to meet primarily local needs, this includes 33 ha at the proposed Warrington Commercial Park, whose delivery would be tied to the development of the Western Link Road.

5.10 Ultimately, **496.10 ha** of supply is potentially available in the Call for Sites options graded A+ to B- , sufficient to meet projected OAN. However, this supply will need to be further reviewed against other planning criteria, particularly as most options would require Green Belt release to realise. Also, almost three quarters of this supply, 359.18 ha, comprises A- and/or B- graded land which has constraints which need to be overcome before development can be realised.

Summary

5.11 Updating the 2019 EDNA, BE Group has reviewed 52 Regulation 18 site submissions, plus land at Fiddlers Ferry (Six56 Phase II includes parts of an existing Reg. 18 site), where B-Class employment uses are proposed, either individually or as one of several possible uses. These have been appraised and graded A-E, as defined in Table 12 above. Two amendments to the grading methodology are made for this 2021 EDNA:

- The introduction of A- and B- Categories – This reflects the fact that there now are some large sites which have significant constraints, but which remain desirable to the market and which are under developer control, with a potential ‘way forward’ as to how those constraints could be overcome
- Two grades are now given, a current grading and potential future grade – The latter is the grade the site could achieve if the identified development plans are realised. As only a few sites have identified development plans, the two grades will only be different in a small number of cases.

5.12 Table 16 summarises the opportunity sites by each of the above grades. Sites suitable for further consideration in the Local Plan Process are graded A+ to B-.

Table 16 – Site Submissions Appraisal by Category (Based on Current Grading)

Category	Number of Sites	Land Supply, ha	Comments
<u>A+</u> Unconstrained/Limited Constraints – Strategic Development Options	1	92.00	Land at Bradley Hall Farm, Cliff Road (Six56) – based on this modelling the strongest strategic option being put forward.
<u>A+/B+</u> Unconstrained/Limited Constraints – Strategic and Local Development Options	6	44.92	Land around Barleycastle Lane, Barleycastle which could be developed for a mixture of local and strategic schemes, with limited constraints evident. Includes one smaller parcel, more suited to local uses, graded B+.
<u>A-</u> Constrained – Strategic Development Options	1	70.00	Six56 Phase II – Further strategic growth option in SE Warrington, but subject to further planning on deliverability, access, etc.
<u>A-/B-</u> Constrained – Strategic and Local Development Options	9	244.68	Including Fiddlers Ferry (101 ha), Port Warrington (60 ha) and seven sites in Rixton. Options for further growth subject to a range of constraints being addressed.
<u>B-</u> Constrained –Local Development Options	2	44.50	Constrained, local only development Options.
<u>C</u> Local Scale Mixed Use Sites/Proposed to Meet Specific Business Needs	8	137.72	By settlement: <ul style="list-style-type: none"> • Burtonwood – 1 site (3.9 ha) • Lymm – 3 sites (124.13 ha) • Stretton – 2 sites (7.29 ha) • Winwick – 2 sites (2.40 ha). Most are mixed-use proposals, so the impact of the other uses will need to be reviewed separately.
<u>C-D</u> Local Scale Mixed Use Sites (<i>but with greater deliverability questions</i>)	3	33.87	-
<u>D</u> Limited suitability for B-Class Uses	21	102.67	Based on market fit/deliverability, sites are poorly suited for employment development. This does not preclude the possibility that they are suited for other uses.
<u>E</u> Unlikely to be deliverable development site	2	5.94	Assumed undeliverable for most uses.
TOTAL	53	776.30	

Source: BE Group, 2021

5.13 Of a potential supply of 776.30 ha, 496.10 ha (63.9 percent) is potentially available in the Call for Sites options/other submissions graded A+ to B-, sufficient to meet projected OAN. However, this supply will need to be further reviewed against other planning criteria, particularly as most options would require Green Belt release to realise. Also, almost three quarters of this supply, 359.18 ha, comprises A- and/or B- graded land which has constraints which need to be overcome before development can be realised.

6.0 WARRINGTON'S WIDER ECONOMIC GEOGRAPHY

Introduction

- 6.1 This section defines and reviews Warrington's role in the wider economy of the North West. It provides a quantitative review of Warrington's Functional Economic Market Area (FEMA), considering sub area linkages to Warrington below the local authority level. It updates a similar exercise completed in the 2019 EDNA.

Guidance on FEMA Definition

- 6.2 Paragraph 19 of the Planning Practice Guidance Note '*Plan-making*' identifies that; "*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.*"

- 6.3 All definitions of Economic Geography are approximations of the interrelationships of a local economy with areas outside the local authority. Analysis 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.

Analysis

Local Enterprise Partnership

- 6.4 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. 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 employment sites in Ellesmere Port in Cheshire West and Chester.

- 6.5 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 review of Warrington's Wider Economic Geography must look beyond the Cheshire and Warrington sub-region.

Travel to Work Area

- 6.6 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 sub-region. This has implications for the definition and understanding of Warrington's Wider Economic Geography.
- 6.7 Table 17 summarises the in and out commuting patterns of Warrington at the time of the 2011 Census (thus core data is unchanged from the 2016 and 2019 EDNAs). Detailed commuting information is only available from census data. The net flows to and from each area are also summarised and show that overall, Warrington was a sizable net importer of labour. In 2011, 14,179 more workers commuted into the Borough from across England and Wales than left to work elsewhere.
- 6.8 When considering Warrington's relationship to individual local authority areas, Warrington had 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.
- 6.9 By far the largest negative flows (i.e., more residents going out of the Borough to work than coming in) were with Manchester and neighbouring Trafford, where Trafford Park, east along the M62/M602 is clearly a strong draw. More surprisingly though, Warrington had 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 17 – 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
Halton	4,674	5,786	1,112
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	3,905	5,532	1,627
Total	34,993	49,172	14,179

Source: ONS 2011 Census

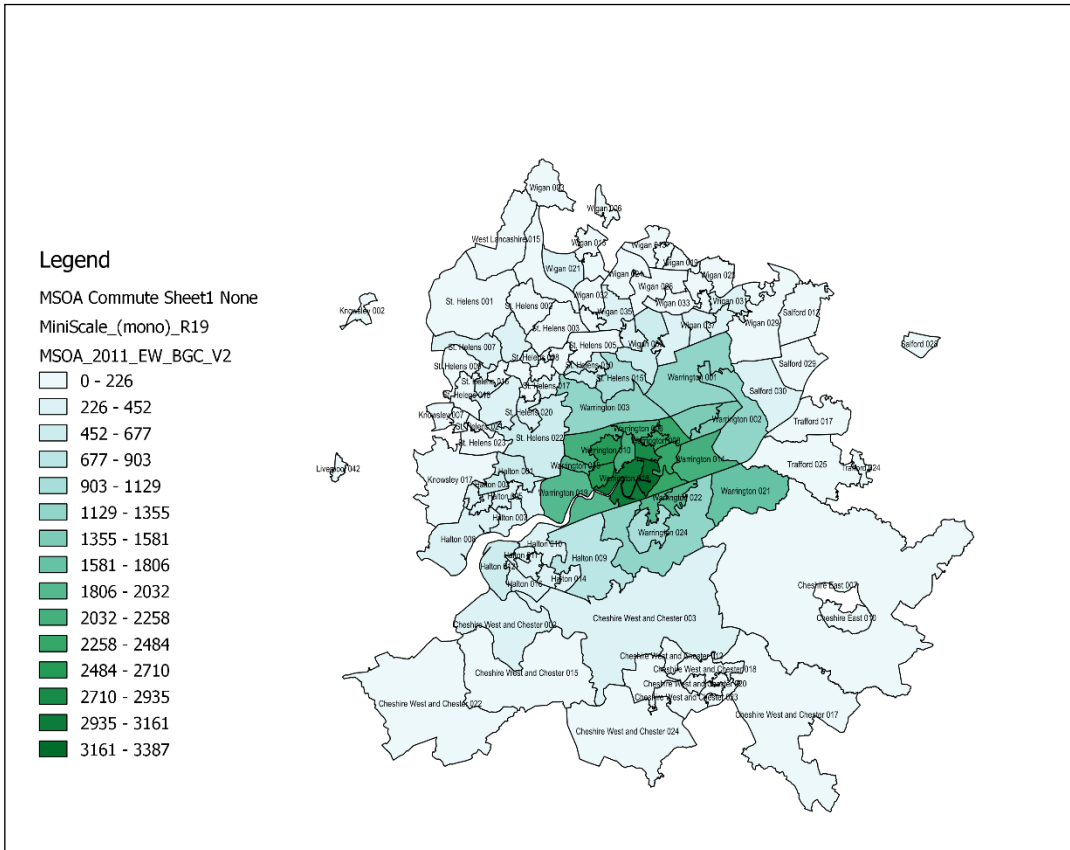
6.10 A strong relationship, in terms of both in and out commuter flows was also noted with Cheshire East and Salford.

6.11 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.

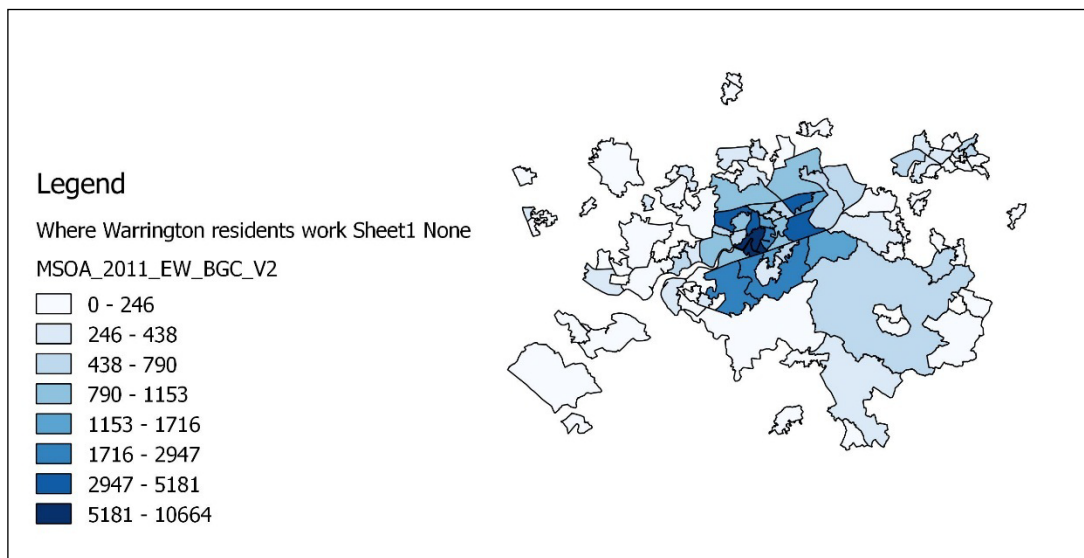
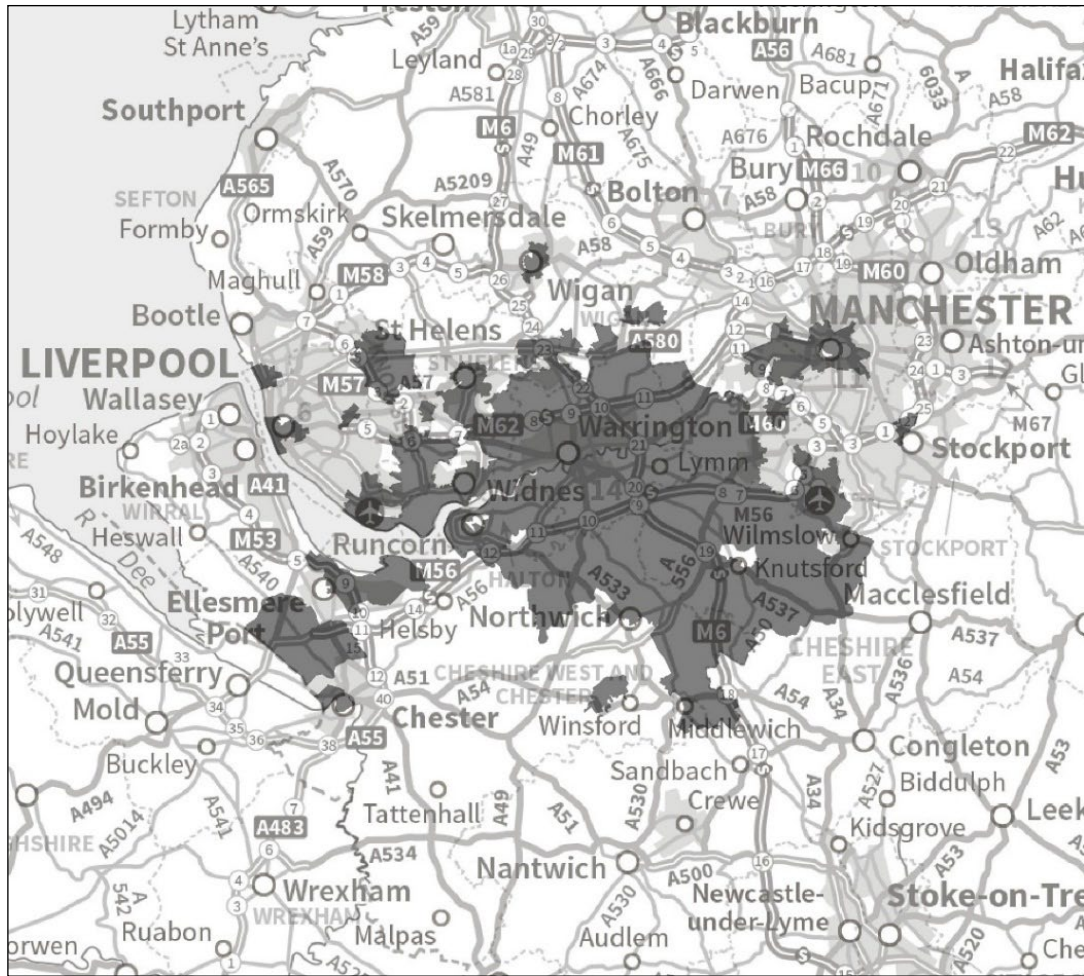
- 6.12 It can be seen that Warrington had strong economic linkages – which can be defined as more than 3,000 commuter movements, in and out of the Borough, to or from that location – with neighbouring Wigan, Manchester, Trafford and Salford in Greater Manchester. In the Liverpool City Region, 10,460 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 was also noted with the City of Liverpool, equating to 5,819 commuter movements in 2011. Relationships with Cheshire were strong but did 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.
- 6.13 The above data shows linkages at the local authority level, but the same data can be considered at a more localised level. Figure 13 below shows where the workers of Warrington were most likely to reside at a Medium Super Output Area (MSOA) level (inflow). Figure 14 shows where Warrington residents travelled to work (outflow).
- 6.14 The maps show that significant number of Warrington residents travelled to Liverpool and Manchester city centres as well as Ellesmere Port. When the analysis is shown on a graduated scale, it can be seen that the larger out-commuting movements were being undertaken in an easterly direction to Cheshire East and Manchester.

Figure 13 – Areas from where Warrington workers travel (>100 people per MSOA)



Source: ONS 2011 Census

Figure 14– Area Where Warrington Residents Work (>100 people per MSOA)



Source: ONS 2011 Census

6.15 Measured at the MSOA level, the following labour relationships were noted:

- Greater Manchester - Warrington drew labour from the bulk of south and west Wigan, incorporating most of Wigan Town, Leigh and Hindley. In Salford, labour was taken from the suburban/rural west, including Irlam and Cadishead and also the central urban area of Ordsall which included part of the City Centre and Salford Quays. In Trafford, again the rural west was included, extended into the City of Manchester around the Airport. In terms of Warrington's out commuting, the main other destination, in addition to the above, was Central Manchester, extending west to the City of Salford, plus a modest commuting focus in Stockport
- Liverpool City Region – In the City Region, labour was drawn from the bulk of St Helens (extending slightly into West Lancashire around the M6/M58 interchange), all of Halton and some southern and eastern areas of Knowsley incorporating Rainhill and Huyton. In Liverpool, the unconnected neighbourhood of Wavertree provides labour, partly explained by this area's strong linkage to the M62 Corridor. In terms of out commuting from Warrington, Central Liverpool and the Knowsley Industrial Estate/Kirby area were further labour destinations
- Cheshire – Unsurprisingly, the north of the county linked most strongly to Warrington. In Cheshire West and Chester that meant Northwich and the M56 Corridor to Helsby and Ellesmere Port, with the employment areas south west of Ellesmere Port a destination for Warrington labour. In terms of both in and out commuting. Chester largely fell outside of Warrington's area of labour catchment, although Sealand Industrial Estate did draw some labour from Warrington. In Cheshire East, it incorporated Knutsford and extended east to Wilmslow and south, down the M6 to the edge of Middlewich.

Housing Market Area

6.16 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. This work has subsequently been updated by a Local Housing Needs Assessments specifically for Warrington. These studies analysed past research, house price trends and dynamics, commuting flows and migration patterns, to define the HMA.

- 6.17 In market-terms there was reasonable alignment in terms of house prices in Halton, St Helens and in urban areas of Warrington. The greatest variation was at Lymm, where local prices were well above HMA averages. Travel to Work Area and Migration data showed a degree of self-containment, within, and across the three local authority areas which was consistent with a defined HMA. There was also well-established Duty to Co-operate joint working between the three local authorities on strategic housing and other related issues. It should also be noted that the Cheshire and Greater Manchester authorities have well established, separate, HMAs.

Market Comments

- 6.18 Warrington competes with other locations along the M62, M6 and M56 Corridors for larger industrial and logistics requirements. With Omega close to capacity, this market will drive future strategic developments in the Borough. The new Fiddlers Ferry development will be accessed through Widnes while one growth option for Omega, extends west into St Helens. 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. Warrington may derive some modest benefits from Manchester/Liverpool based businesses looking for lower density options, outside of urban areas, for socially distanced working.

Services and Infrastructure

- 6.19 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.
- 6.20 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.

- 6.21 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.
- 6.22 Warrington is linked to the Port of Liverpool and is expected to continue to benefit from the growing logistics market of this facility, both in terms of motorway linked warehousing and along the Manchester Ship Canal.
- 6.23 In terms of services, Warrington Town Centre is a significant sub-regional centre serving all of Warrington Borough and 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.

Warrington's Wider Economic Geography

- 6.24 Based on the above evidence, Warrington's Wider Economic Geography 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.
- 6.25 In Greater Manchester, commuting showed a strong relationship with Wigan, extending to most of the main settlements of that Borough, including Wigan Town. Relationships with Salford and Trafford are also strong along the M62/M602 Corridor and focused on the west of each local authority area, including the major Trafford Park Employment Area.
- 6.26 Warrington forms a common LEP area with the northern parts of Cheshire West and Chester and Cheshire East, with further overlaps in the common Enterprise Zone. Commuting suggested strong economic relationships with the northern portions of each local authority area.
- 6.27 The cities of Manchester and Liverpool are geographically more distant. However, market activity in these cities has a big impact on Warrington. In the case of Liverpool, Warrington falls into the strategic B2/B8 market serving the Port of

Liverpool and has an additional infrastructure link along the Ship Canal. Warrington was also a sizable net exporter of labour to the City of Manchester and Birchwood competes with the City for large office requirements.

- 6.28 The other areas of the Liverpool City Region, including Knowsley which has some linkages, but an overall weaker commuting relationship, and Greater Manchester can be said to fall outside the Wider Economic Geography of Warrington. Warrington has a link to all these locations and there will be individual businesses within the Borough that would consider at least some of them as part of their core client base. Overall, however, the relationship is weaker than with the other locations shown above.

Neighbouring Areas

- 6.29 Having reviewed the FEMA of Warrington, the remainder of this section considers each of the districts which fall within that Wider Geography on an individual basis. In all cases, BE Group and Warrington Borough Council consulted with the relevant local authorities on their policy positions as of March 2021. In many cases those local authorities provided some of the wording for their respective sections.

Cheshire

Cheshire West and Cheshire

- 6.30 The Cheshire West and Chester Local Plan (Part One) was adopted on the 29th of 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 at least 365 ha of employment land. Most of the new development will be located within, or on the edge, of the city of Chester and towns of Ellesmere Port, Northwich and Winsford. Key employment locations are identified and safeguarded where these could benefit the wider sub region. This includes sites at Hooton Park, Ince Park, Stanlow (including New Bridge Road) Chester Business Quarter and Chester Business Park
- 6.31 A Housing and Economic Land Availability Assessment (HELAA) and Land Allocations Background Paper was completed for Cheshire West in 2017. This identified a supply of employment land that could be suitable, available and

achievable in the plan period. It informed the identification of employment land allocations in the Part Two Plan.

- 6.32 The Local Plan (Part Two) Land Allocations and Detailed Policies was adopted 18th July 2019. It proposes employment land allocations for each of the main urban areas; Chester, Ellesmere Port, Northwich and Winsford, together with the rural area. Where relevant it includes detailed policies to relate to the key employment areas identified in Part One, including Stanlow, Ince Park (Protos) and Hooton Park (Vauxhall) to the north of the Borough, including sites within the Cheshire Science Corridor enterprise zone Thornton Science Park is identified, within the Stanlow area, for future research and development activity (B1 and B2 use classes). It forms part of the Cheshire Science Corridor Enterprise Zone with Birchwood Park and some competition between the two locations for relevant high-tech companies, is likely, particularly in energy/engineering sectors (although Birchwood has a distinct focus on the nuclear sector).
- 6.33 Ince Park (Protos) is proposed for a multi-modal resource recovery park and energy from waste facility, with a developable area of some 50 ha. Phase 1 developments are underway, with two of the plots now built and operational. Protos and the Stanlow Refinery/Wider Policy Area do not have direct equivalents in Warrington and their development will expand and diversify the wider economy. The Local Plan supports opportunities for freight transport on the rail network or via the Manchester Ship Canal, to be integrated into new development. Phase 2 of Protos scheme includes new berth facilities onto the Manchester Ship Canal and provision of rail infrastructure.
- 6.34 Hooton Park falls within the Cheshire Science Corridor Enterprise Zone and is identified as being suitable for logistics and advanced manufacturing. Most of the land within the area is in operational use for GM Vauxhall and suppliers. Recent speculative development has taken place by Redsun developments, with the completion of the first phase of Aviator Park, with future phases of development anticipated.
- 6.35 Northwich is home to sizable business parks and industrial estates including Gadbrook Park and the now largely complete Cheshire Business Park. Along with Winsford 1-5 Industrial Estate, these compete in the sub-regional market and have attracted a mix of local and regional occupiers. The Local Plan (Part Two) and the

made Winsford Neighbourhood Plan make additional employment land allocations in Northwich and Winsford, to meet future demands. This includes land to the south west of Gadbrook Park to be comprehensively planned through a Development Brief. Employment land is also allocated in the Wincham area, to provide for a mix of uses. In Winsford, land allocations allow for the further expansion of Winsford Industrial Estate.

- 6.36 The Local Plan also identifies there are major commercial sites in the green belt, which make a significant contribution to the local economy which may have further development potential in the plan period. This includes Urenco, Capenhurst, in connection with the nuclear sector, scientific and engineering research. Chester Business Park is identified as a high quality office location in the Green Belt, within a parkland setting.
- 6.37 The Council's Annual Monitoring Reports provide more detailed information on employment land supply and take up within Cheshire West and Chester over the Plan period and can be viewed at http://consult.cheshirewestandchester.gov.uk/portal/cwc_ldf/mon/.

Cheshire East

- 6.38 Cheshire East's Local Plan Strategy was adopted on 27th July 2017. The overall growth proposition is to deliver at least 36,000 new homes by 2030 and around 31,000 jobs over the same time scale. A minimum of 380 ha of employment land is also proposed. Significant new employment areas are proposed to underpin the strategy at Basford, Crewe; Radway Green, between Alsager and J16 of the M6; land adjacent to J17 of the M6 at Sandbach; Ma6nitide (formerly known as Midpoint 18), Middlewich; North Congleton; South Macclesfield; and Wardle, near Nantwich.
- 6.39 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 Ma6nitide (formerly Midpoint 18), Middlewich; Alderley Park, near Macclesfield and the North Cheshire Growth Village, Handforth East.

Ma6nitide (formerly known as Midpoint 18)

- 6.40 Ma6nitide is a major mixed-use site, offering around 165,000 sqm of accommodation, in units ranging from 3,800 sqm to 35,000 sqm. The scheme has a development partner, Tritax Symmetry, and speculative development is

programmed over the new few years. As of March 2021, some 139,000 sqm of further B2/B8 accommodation was either in for planning or approved, including further space for major occupier Swizzels. Located close to Junction 18 of the M6, it can be identified as a strong competitor to equivalent locations, existing and planned, in Warrington.

Alderley Park

6.41 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.

6.42 The site currently offers around 190,000 sqm of scientific laboratory space, offices, restaurants, cafes, leisure facilities, conferencing space and is home to a cluster of over 150 businesses and approximately 3,000 staff. The most recent developments here have primarily been residential, although 2020 also saw the completion of a 17,000 sqm new HQ office for Royal London.

North Cheshire Growth Village

6.43 A major new community of 1,500 homes, and up to 12 ha of employment land, this is expected to be a long-term growth project, driven forward by the Engine of the North. A hybrid planning application was submitted for this site (App. No.19/0623M) by Engine of the North for 1,500 homes, 21,000 sqm of new mixed employment uses, local village centre together with associated infrastructure. Assuming this is consented new development and other infrastructure works will commence in mid-2024 and be completed by mid-2031.

Crewe

6.44 Crewe sits outside of the core area of Warrington's Wider Economic Geography, but it is still worth noting that over the long term, Crewe is identified by Cheshire East Council as a 'High Growth City' and focus for investment and development, deriving particular benefits from the HS2 infrastructure proposed. A core growth focus will be the Basford East and West sites, which will include some 46 ha of employment land. Basford West (Crewe Commercial Park) is a new development of 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 offers the opportunity of a dedicated rail siding, and rail freight terminal offering direct access to the West

Coast Main Line.

Greater Manchester

Greater Manchester Joint Development Plan

- 6.45 In October 2016, the Greater Manchester local authorities published the first draft of the Greater Manchester Spatial Framework (GMSF). Following that period of consultation, a revised draft was published for consultation in January 2019. Amongst other changes, this revised document had a reduced amount of Green Belt released to meet housing and employment needs. On the 30th October 2020 the AGMA Executive Board unanimously agreed to recommend GMSF 2020 to the 10 Greater Manchester Councils for approval to consultation at their Executives/Cabinets, and approval for submission to the Secretary of State following the period for representations at their Council meetings. However, at its Council meeting on 3rd December Stockport Council resolved not to submit the GMSF 2020 following the consultation period and at its Cabinet meeting on 4th December, it resolved not to publish GMSF 2020 for consultation.
- 6.46 As the GMSF 2020 was a joint development plan document of the ten Greater Manchester authorities it required the approval of all ten local authorities to proceed. The decisions of Stockport Council/Cabinet therefore signalled the end of the GMSF as a joint plan of the ten and consequently the anticipated Regulation 19 stage did not take place in December. Instead, nine GM districts have resolved to prepare a joint development plan document without Stockport; Stockport will produce its own local plan individually.
- 6.47 Although the GMSF 2020 was not formally published under Regulation 19, a draft copy was made available in October 2020 in which GM's overall strategic approach to economic growth was set out. It identified the steps GM would take to support long-term economic growth including facilitating the development of high value clusters in prime sectors such as advanced manufacturing; digital and cyber; health innovation; low carbon goods and services; business, financial and professional services and logistics. It also identified a number of key growth locations including, the heart of GM stretching from the Etihad Campus in the east through the City Centre, the Quays and Trafford Park to the Trafford Centre and Port Salford in the west; Manchester Airport Enterprise Zone; the main town centres; a North East Growth Corridor and a Wigan and Bolton Growth Corridor.

- 6.48 The GMSF 2020 stated a target of at least 2.5 million sqm of accessible new office floorspace to be delivered across Greater Manchester by 2037. The City Centre, The Quays, the Airport Enterprise Zone and the town centres being the focus for this development.
- 6.49 The GMSF 2020 stated a target of at least 4.1 million sqm of new, accessible industrial and warehousing floorspace to be delivered across Greater Manchester by 2037. In delivering this, the plan proposes to make the most of the conurbation's key growth locations and to significantly increase the supply of high quality sites across the northern parts of the conurbation, including the strategic opportunity at Northern Gateway.
- 6.50 This economic growth sits alongside the proposal to meet Greater Manchester's local housing need up to 2037.
- 6.51 The nine GM districts preparing a joint plan hope to use provisions in the 2004 Planning Act and the associated Regulations to enable them to proceed to Regulation 19 with their plan. On this basis, it is currently anticipated that the new "Places for Everyone" Joint Development Plan will have substantially the same effect on the remaining districts as the GMSF 2020 would have done. Therefore, whilst it is very likely that the economic and residential targets will need to be amended to take account of the fact that Stockport is no longer part of the joint plan, the overall economic strategy is anticipated to be largely the same as that expressed in the GMSF 2020. Such an approach would be consistent with the recently published GM Local Industrial Strategy.

City of Manchester

- 6.52 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.
- 6.53 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.

6.54 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.

Salford

6.55 At the time of writing, the policies of the Adopted 2006 Unitary Development Plan (UDP) that were saved beyond June 2009 remain the primary DPD for Salford. However, the Local Authority is currently progressing a new Local Plan alongside Places for Everyone, which it is proposed will be a joint DPD of 9 Greater Manchester districts including Salford.

6.56 Four stages of consultation have been undertaken on the Local Plan:

- Call for Sites consultation (February to April 2013)
- Suggested sites consultation (January to March 2014)
- Draft Local Plan (November 2016 to January 2017)
- Revised Draft Local Plan (January to March 2019).

- 6.57 Following the consultation on the Revised Draft Local Plan in January 2019, a decision was made to produce the local plan in two parts. Part 1 (which is what the City Council is progressing with now) focusses on development management policies and designations, with the exclusion of site allocations and proposals for the overall scale and distribution of development. The Publication Salford Local Plan: Development Management Policies and Designations (SLP:DMP) was published in January 2020 and comments invited on this document until March 2020. Further to this, some proposed modifications to the Publication SLP:DMP were published in February 2021 and comments invited on these until 19th March 2021. It is expected that the plan will be submitted to the Secretary of State in June 2021 and the independent examination of this is anticipated to take place in October/November 2021.
- 6.58 The other elements originally intended for inclusion in the Local Plan, such as the scale and distribution of development and site allocations, will be progressed through a separate document, Salford Local Plan: Core Strategy and Allocations, and work will start on the production of this document once the Joint DPD is further progressed.
- 6.59 In respect of economic development, the Publication SLP:DMP includes the following policies:
- EC1 Existing employment areas; a development management policy to protect and enhance the function of Salford's existing employment areas
 - EC2 Port Salford: This policy relates to the existing permitted element of Port Salford and protects the multi-modal freight terminal, employment area and line of the link between Port Salford and the Manchester – Liverpool rail line.
- 6.60 Area policies for City Centre Salford (AP1), Salford Quays (AP2) Ordsall Waterfront (AP3), the Salford Innovation Triangle (AP4) and Employment Areas close to the City Centre and Salford Quays (AP5). The purpose of these policies is to ensure that development is carefully managed in those areas of the city with the highest pressures for development.
- 6.61 The scope of the emerging SLP:DMP does not include proposals relating to the

scale and distribution of development, however Salford's latest published Housing and Economic Land Availability Assessment (November 2020) identifies the potential for a gross addition of around 350,000 sqm of office floorspace and around 220,000 sqm of Industrial/warehouse floorspace over the period to 2037.

- 6.62 The majority of new office floorspace is identified as coming forward within City Centre Salford and Salford Quays. Most of the new industrial/warehousing floorspace will be provided at Port Salford.
- 6.63 The consented Port Salford to the south of the A57, is a £138 million development and will be 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 its lifetime. It will provide a container facility capable of handling 300,000 containers and 37 million freight pallets per year along with around 155,000 sqm of warehouse space. Port Salford will be part of Liverpool City Region's Freeport as announced in the budget in March 2021.
- 6.64 Culina Group occupy a warehouse on the site and, in late 2017, Reserved Matters Consent was granted for the remaining warehouse space, comprising some 120,000 sqm over three units of up to 40,000 sqm.
- 6.65 An extension to the permitted Port Salford on land to the north of the A57 was proposed in the emerging Greater Manchester Spatial Framework as an allocation. The extension was identified as potentially providing a further 320,000 sqm of employment floorspace with a strong focus on logistics but also incorporating high quality manufacturing floorspace. Whilst the Greater Manchester Spatial Framework will not progress further in its current form (following the withdrawal of Stockport Council) the remaining nine Greater Manchester authorities have signalled their intention to continue with a joint Development Plan Document, Places for Everyone. The joint DPD will include allocations and so the potential expansion of Port Salford will be considered through this process.
- 6.66 The large Northbank Industrial Estate in Cadishead may also draw labour from Warrington. The 2011 Census indicates Warrington to be a modest net exporter of labour to Salford, with a net outflow, in 2011, of 417.

Trafford

- 6.67 The Trafford Local Plan: Core Strategy was adopted in January 2012. It proposed 190 ha of further employment land between 2008/09 and 2025/26. Trafford Council consulted on a Regulation 18 Issues Paper, Integrated Assessment Scoping Report and a Call for Sites for a new Trafford Local Plan in July 2018. A full Draft Trafford Local Plan (Regulation 18) was consulted on in 2021, ending on 18th March 2021.
- 6.68 Strategic allocations in the GMSF 2020 included allocations in Trafford at New Carrington (GM Allocation 41) and Timperley Wedge (GM Allocation 3.2).
- 6.69 The New Carrington allocation includes the former Shell Carrington Industrial Estate and was proposed for approximately 400,000 sqm of employment floorspace and approximately 5000 new homes in total.
- 6.70 The Timperley Wedge allocation sat alongside Medipark (Manchester) as a joint allocation in the GMSF 2020. Timperley Wedge was proposed for approximately 60,000 sqm of office floorspace and approximately 2,500 new homes in total.
- 6.71 Both of the strategic allocations within Trafford were expected to deliver less than these totals within the GMSF 2020 plan period (up to 2037).
- 6.72 Links between Trafford and Warrington will inevitably be focused at Trafford Park and surrounding areas, which lies at the northern end of the Manchester Ship Canal and is Europe's largest industrial park. To the east of the core industrial area of Trafford Park lies the area known as Trafford Wharfside and to the west of Trafford Park, the Trafford Centre Rectangle which surrounds the Trafford Centre regional shopping complex. Some 40,000 are employed here in over 1,400 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. The area of Pomona falls further to the east of Trafford Wharfside.
- 6.73 The adopted Core Strategy (2012) identified five strategic locations where the majority of growth was expected to take place in Trafford. As work on the Draft Trafford Local Plan has progressed, alongside work on the housing land supply particularly in relation to large sites, these areas of expected growth have been reviewed and are expected to take shape as follows:
- 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 new office floorspace

- 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 approximately 2,000 new homes and approximately 25,000 sqm of new office floorspace
- Trafford Centre Rectangle – the area surrounding the Trafford Centre shopping centre, with potential for approximately 1,900 new homes and approximately 80,000 sqm of new office floorspace in the area known as Trafford Waters
- Civic Quarter – The Council consulted on a Regulation 19 Area Action Plan for the Civic Quarter at the start of 2021. This area is expected to deliver up to 4000 new homes and up to 50,000 sqm of new office and commercial floorspace
- New Carrington and Timperley Wedge – Redevelopment of brownfield land around Carrington and Partington, including 75 ha of employment land.

Wigan

6.74 The Wigan Development Plan comprises the Wigan Local Plan Core Strategy (2013), saved policies from the Wigan Replacement Unitary Development Plan (2006), the Greater Manchester Joint Waste Plan (2012), the Greater Manchester Joint Minerals Plan (2013) and the Standish Neighbourhood Plan (2019). The Council is currently working in partnership with the Greater Manchester Combined Authority and eight other Greater Manchester districts on the preparation of a joint strategic development plan called Places for Everyone. Adoption of this is scheduled for 2023.

6.75 The Wigan Local Plan Core Strategy identifies a need for approximately 200 hectares of employment land over the period 2011-2026, equivalent to 13.3 ha/year. However, employment land take up has been significantly below this with only 20.15 ha taken up during 2011-2020, equating to just 2.23 ha/year. Whilst the low take-up was initially primarily dictated by the international recession, the limited supply of high quality, larger deliverable employment land options has also been a considerable factor. This is evidenced by a significant fall in delivery rates after 2006, two years before the recession began, and also by a consistently high level of investment enquiries being received by the Council from potential investors over

recent years, who despite interest in the borough have not found the right site. In addition to this, there has been a continuing trend of land being lost to non-employment uses, primarily housing.

- 6.76 A lack of the right sites, in terms of scale, location and quality; the significant level of enquiries received by the council; and the lack of investment in the borough collectively demonstrates a clear misalignment between the available employment land supply in the borough and the type of sites required to meet modern business needs.
- 6.77 To help address this, Wigan Council is currently developing proposals to allocate new employment sites as part of the Places for Everyone Plan, including:
- 140,000 sqm of employment floorspace at M6 Junction 25, Wigan
 - 15,000 sqm of employment floorspace at Pocket Nook, Lowton (as part of a mixed use allocation)
 - 45,500 sqm of employment floorspace at West of Gibfield, Atherton (as part of a mixed use allocation).
- 6.78 This would introduce around 200,000 sqm of new high quality employment floorspace into the borough that would meet current business requirements and enable Wigan to compete better for investment in the sub-region.
- 6.79 A planning application from Tritax Symmetry for 133,966 sqm of B8 floorspace (with ancillary office floorspace) at M6 Junction 25 was approved by Wigan Council in January 2020 but was called in by the Government and was heard at a public inquiry in December 2020. A decision from the Secretary of State is expected prior to June 2021.

Liverpool City Region

- 6.80 The Liverpool City Region Strategic Housing and Employment Land Market Assessment (SHELMA, 2018) was published by the Liverpool City Region Combined Authority (LCRCA) and West Lancashire Council.
- 6.81 The SHELMA suggests that the Liverpool City Region will require 308-397 ha of land for B8 use arising from investment at the Port of Liverpool as well as a more general increase in employment land and housebuilding.

- 6.82 Key within this will be land for large warehouses of over 9,000 sqm, to meet growing needs emerging primarily, but not exclusively, from the Port of Liverpool. It also assumes that, given average lifespans of 30-35 years, around half of the existing warehouse stock in the city region will require replacement by 2033. Forecasts of need were:
- Do-minimum – reflecting recent underlying economic growth alongside minimal investment in transport infrastructure (nothing beyond that already committed) and no other public sector interventions – 308 ha needed by 2037
 - Do-something/ Transport for the North Strategy – The consultant’s strategy, which also reflects the results of an extensive consultation exercise with the freight and logistics industry in the North of England and the public sector – 397 ha needed by 2037.
- 6.83 In addition, the commodities forecasts presented within the Mersey Ports Masterplan identify a need for around 340 ha of land to 2030. This includes land for Port-related logistics (113 ha) which will overlap with the above demand forecasts for B8 warehouse development.
- 6.84 No attempt was made at this stage to disaggregate the large scale B8 need at a local authority level. As is noted *“The market for large-scale warehouse/ distribution development is sub-regional in nature, and growth at a local level is typically supply-driven – it is influenced by the availability of land at attractive locations.”*
- 6.85 In principle, there is enough brownfield land within the City Region to meet these requirements. In practice, only a few major B8 sites are in the pipeline, including developments at Haydock; along the A5036 Dunningbridge Road, Netherton and most significantly the Parkside scheme.
- 6.86 Since the SHELMA was completed Halton, Wirral, Liverpool and St. Helens have progressed options for larger B2/B8 development. In regard to Warrington, St Helens is key with three public inquiries underway in early 2021 for the strategic sites of Parkside, Haydock Point and the Omega West extension. All will impact on the Warrington market, with the Omega West extension likely to directly meet some of Warrington Borough’s requirements.
- 6.87 It should also be noted that Parkside, along with the 3MG extension in Widnes and

Wirral Waters, have been identified as a “Customs sites” for the City Region Free Port which was awarded (subject to FBC) at the 2021 UK budget. This will likely attract greater investment interest from developers and occupiers and potentially impact on their delivery timetables.

- 6.88 The LCRCAs will undertake a new study or refresh of the large scale B2/B8 requirement and capacity within the City Region as part of the development of the Liverpool City Region Strategic Development Strategy, however there is no timetable to procuring this at the time of writing.

Halton

- 6.89 Halton is preparing a new Local Plan, the Delivery and Allocations Local Plan, (DALP) that will replace the remaining policies and the Proposal Map from the Unitary Development Plan (2005) and most policies from the Core Strategy (2013).
- 6.90 The DALP covers the period to 2037 and includes redefining the extent of the Green Belt in Halton. The DALP was submitted to the Secretary of State in March 2020 and is currently being examined by Inspectors from the Planning Inspectorate.
- 6.91 The Plan sets out the key strategic employment sites in the Borough as:
- Daresbury Science and Innovations Campus, Runcorn (20 ha)
 - 3MG, Widnes (57 ha)
 - Widnes Waterfront, Widnes (27 ha)
 - West Runcorn /Inovyn, Runcorn (26 ha).
- 6.92 In terms of employment land, the identified need is for around 7 ha/year over the DALP period 2014-2037. This generates a total land requirement of 190 ha including a 20 percent flexibility factor to maintain a range and choice of sites throughout the plan period.
- 6.93 The DALP identifies sufficient sites to meet the identified requirement, as well as identifying opportunities for remodelling and regeneration of sites within existing employment areas. This includes 14 ha in the West Runcorn area.
- 6.94 The DALP proposes an eastwards extension of the Manor Park Industrial Estate providing scope to accommodate additional large space users.

Existing Employment Areas

- 6.95 The Widnes rail freight facility, 3MG is a strategic facility for the sub-region operating as an inland port allowing intermodal (rail-road) freight transfer. The core area of this, which is owned and operated by Stobart Group.
- 6.96 The associated 45 ha Field site is now partially occupied by Alstom who have constructed a large rail rolling stock refurbishment and training facility.

Sci-Tech Daresbury

- 6.97 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). An Enterprise Zone since 2012, new development has been facilitated through a public-private joint-venture between, STFC and Halton Borough Council and developer Langtree. 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. Vanguard House provides further grow on and larger business accommodation.
- 6.98 The Innovation Technology Access Centre (I-TAC) opened in 2010 and is now providing laboratory facilities for about six companies on campus. Some of these companies also have office bases in the Innovation Centre. The campus expanded further in 2017 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. Another 4,200 sqm of speculative office space was consented in early 2018 and planned to commence later in the year.
- 6.99 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.
- 6.100 Located close to the boundary with Warrington and easily accessible from Warrington Town, Sci-Tech clearly has links to Warrington and is the main competing location for the Cheshire Science Corridor facilities, including Birchwood.

Daresbury Park

- 6.101 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.

- 6.102 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

- 6.103 Growth potential, primarily redevelopment and infill options, is seen in West Runcorn, particularly at Inovyn and the Port of Runcorn. Masterplanning to capture the full scale of growth potential here is ongoing, with an initial phase of 9 ha under consideration. However, the location has long term potential to accommodate a range of high tech businesses, in varying manufacturing, R&D and production sectors, alongside port related growth along the Ship Canal, to operate alongside options in Warrington.

Liverpool

- 6.104 A Liverpool Employment Land Study was completed in 2017. This report concludes that around 105 to 140 ha of employment land is needed over the period 2013 to 2033 to meet the City's needs. Taking a mid-point of these forecasts give a requirement for around 122 ha of employment land for the City. This identified requirement considers the needs of the City only. An indicative split by B-Class uses (it should be noted that the ELS was developed based on the Use Classes which existed at the time it was written) would suggest a need for around 25-30 ha of land for office uses, 20-30 ha for industrial uses and around 60-80 ha for warehouse and distribution uses.
- 6.105 In addition to meeting the City's own needs the ELS identified, just over 27 hectares of employment land within the City, consisting of two sites Land to the West of junction of Long Lane and Stopgate Lane (5.0 ha) and Stonebridge Cross (22 ha) (commitment and designated as PIA) as being suitable to support the sub-regional demand resulting from the planned development of the City Region SuperPort.

Combined this gives an overall requirement for 149.5 hectares of land for industrial and businesses uses.

- 6.106 However, further work undertaken in 2018 to assess in more detail site suitability for strategic warehousing in Liverpool and across the City Region indicates that the Land to the West of junction of Long Lane and Stopgate Lane of 5.0 ha is not in fact suitable for meeting sub regional needs as the location of the site within the existing industrial area makes development for smaller units more likely than strategic warehousing development. As a consequence, the 27 hectares of employment land within the City identified above as being suitable to support the sub-regional demand from the SuperPort is reduced to 22 hectares. This reduces the overall need to 145 ha (as rounded).
- 6.107 Liverpool City Council submitted the Submission Draft Liverpool Local Plan for independent examination in May 2018 and an Examination in Public (EiP) was held in October 2020.
- 6.108 To inform the EiP an update to the employment land supply/demand position to an April 2019 base date was provided. This identified a residual demand for employment land of 73 ha against and identified supply of approximately 48 ha. Mixed-use sites are not included within the supply figures because in most instances the precise quantum of land likely to come forward for industrial/business employment uses is, at the present time, unknown. However, it is recognised that these sites will deliver an extra quantum of employment land supply. In addition to this, the Liverpool Waters mixed-use proposal is based on the outline planning permission estimated to deliver approximately 5.5 ha. Taking this into account the updated employment land supply balance at April 2019 identifies a shortfall of 19 ha. The draft plan sets out 22 sites for industrial/business use, four for office development, plus eight mixed-use options with industrial/business employment potential.
- 6.109 The plan sets out the view that new industrial development will be undertaken within the existing industrial areas – the main areas of which are in Speke, Garston, Liverpool Waters and Aintree.
- 6.110 As noted above, one surprising element of Liverpool’s relationship with Warrington is that 563 more workers travelled from Liverpool to Warrington to work than

commute into the City. 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

- 6.111 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.
- 6.112 A new Local Plan has been drafted and the proposed Local Plan Submission Draft' was consulted on between January and May 2019 and was submitted to the Secretary of State in October 2020. The Plan is currently at Examination in Public. The Council hopes to adopt this Local Plan in late 2021/early 2022. The Plan, in Policy LPA04, sets out the intention to deliver a minimum of 215.4 ha of employment land between 1 April 2018 and 31 March 2035 to meet the needs of St Helens Borough. However, the Council has suggested a modification to this figure to the Local Plan Inspectors to adjust it to 219.2 ha on account of a minor double counting issue identified. With a view to meeting this identified need, the Local Plan Submission Draft allocates 10 sites totalling 234.08 ha, plus an additional site allocation of 31.22 ha (Site 1EA at Omega) to help meet identified needs in Warrington Borough (see Table 18).
- 6.113 With the exception of the Omega allocation to help meet Warrington's identified employment needs, the majority of the proposed employment land allocated in the Local Plan Submission Draft is located in the Haydock area and close to Newton-le-Willows (i.e., Parkside East and West), close to existing employment areas (i.e., Haydock Industrial Estate), and key transport corridors. This will require the release of land from the St Helens Green Belt.

Table 18 – Allocations for Employment Development

Site Name	Indicative Site Area (ha)	Appropriate Use(s)
Omega South Western Extension, Land north of Finches Plantation, Bold (to meet employment land needs arising in Warrington)	31.22	B2, B8

Site Name	Indicative Site Area (ha)	Appropriate Use(s)
Florida Farm North, Slag Lane, Haydock	36.67	B2, B8
Land North of Penny Lane, Haydock	11.05	B2, B8
Land South of Penny Lane, Haydock	2.16	B2, B8
Land to the West of Haydock Industrial Estate, Haydock	7.75	B2, B8
Land west of Millfield Lane, south of Liverpool Road and north of Clipsley Brook, Haydock	20.58	B2, B8
<i>Parkside East, Newton-le-Willows</i> The Parkside East site has a gross area of 124.55ha, of which at least 60 ha is reserved for development of a Strategic Rail Freight Interchange or other rail enabled use. The indicative site area of 64.55 ha represents the remainder of the site which may be developed for a wider range of employment uses subject. A further 5.58ha of land is included, to the west of the M6, to facilitate the provision of rail access to the site from the north.	64.55	B2, B8 (Strategic)
<i>Parkside West, Newton-le-Willows</i> Excludes the 5.58ha of land which is required to facilitate rail access to Parkside east and a further 12.1 ha that is occupied by a spoil heap which is not considered developable.	79.57	B2, B8
Land to the West of Sandwash Close, Rainford	6.96	B2, B8
Land at Lea Green Farm West, Thatto Heath	3.84	B1, B2, B8
Gerards Park, College Street, St. Helens Town Centre	0.95	B1, B2, B8
Total	265.30	-

Source: St Helens Council, 2020

6.114 Two further potential employment sites – Omega North (29.98 ha) and Haydock Point North (55.90 ha) – which are close to the boundaries with Warrington Borough are proposed to be safeguarded for needs beyond the current plan period.

6.115 In 2015, BE Group completed an Employment Land Needs Study for St Helens, examining land requirements to 2037, this was reviewed in the 2019 EDNA. An addendum on St Helens' employment land needs was produced in 2017 and updated in 2019.

6.116 The 2019 Employment Land Needs Study– Addendum Report identified several updated factors that have for the employment OAN in St Helens:

- The warehousing and logistics market was performing strongly with further demand for growth in the regional market, including within St Helens.

- The large-scale warehousing market had substantial land requirements across the Liverpool City Region, equating to some 512 ha by 2043. St Helens could play a significant role in the provision of such land, particularly given its proximity to the motorway network and the employment development around the former Parkside colliery (including a Strategic Rail Freight Interchange (SRFI)).
- The latest take-up information resulted in a reduced average of take-up over the last 20 years and therefore slightly reduced forecast of the land requirement to 2037. The lack of take-up in recent years reflected the lack of appropriate land, particularly for the growing warehousing sector, which saw considerable growth in the region and subregion, for example at Omega North and South.
- Planning applications and permissions suggested that the market is on the cusp of a growth period, driven by warehousing development. Of particular note was that the former Parkside colliery scheme is likely to come forward earlier than anticipated in the 2015 Study.

6.117 Given the land constraint apparent in the take-up data since about 2011/12, the period 1997-2012 was felt to be best to measure take up from and project it forward. An increased additional allowance for land for major projects and large-scale logistics was identified at 55-65 ha. This resulted in projected needs of 190-239 ha between 2012 and 2037 (Table 19).

Table 19 – 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	55-70
B8 Storage and Distribution	110-155
Total employment needs	190-239

Source: BE Group, 2019

Summary

6.118 Reflecting comments made in Regulation 18 Consultations, this Section has reviewed the FEMA exercise completed in the 2016 and 2019 EDNAs and

completed a broader review of Warrington's Wider Economic Geography. Based on a mix of market evidence and commuting data, that Geography includes most of Wigan Borough, and the western portions of Trafford and Salford in Greater Manchester. The northern areas of Cheshire West and Chester and Cheshire East have strong links, as do Halton and St Helens in the Liverpool City Region. Although geographically more distant, Warrington also has good links with the urban centres of Manchester and Liverpool. The other areas of Greater Manchester and the Liverpool City Region have more limited relationships with Warrington.

- 6.119 This exercise shows the broad range of economic linkages Warrington has with the wider North West, however, Warrington's relations with each part of the region will differ based on specific circumstances. Thus, there can be no uniform policy approach for Warrington to respond to and engage with this broad area and initiatives must reflect the Borough's needs and priorities in each policy area.
- 6.120 Cheshire West and Chester has good commuting links with Warrington, focused around the M56 Corridor and Northwich, although southern parts of the Borough, including Chester, have more limited linkages. Links to Warrington include employment areas around Ellesmere Port. Thornton Science Park forms part of the Cheshire Science Corridor Enterprise Zone, along with sites at Ellesmere Port (including Hooton Park), Birchwood Park and Alderley Park.
- 6.121 In Cheshire East, Magnitude (formerly Midpoint 18) has some potential to compete with Omega, and its successors, for B2/B8 requirements. Expanding employment areas in Crewe represent a further focus for economic development in the Cheshire and Warrington area, although economic links to Warrington are more limited. 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. The most recent developments here have primarily been residential, although 2020 also saw the completion of a 17,000 sqm new HQ office for Royal London.
- 6.122 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. Growth at Salford Quays

will also impact on Warrington's office market, although the sectoral focus of the Quays (media/digital) differs somewhat from Warrington's. Growth plans for the Western Gateway area more generally (Salford and Trafford) may increase the draw of labour from Warrington.

- 6.123 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 15,000 sqm of employment floorspace as part of a mixed use allocation. If delivered, this would meet needs along this corridor which runs close to the boundary with Warrington Borough
- 6.124 The latest research into the Port of Liverpool predicts increases in all areas of port trade. The 2018 SHELMA suggests that the Liverpool City Region will require 308-397 ha of land for B8 use arising from investment at the Port of Liverpool as well as a more general increase in employment land and housebuilding. In addition, the commodities forecasts presented within the Mersey Ports Masterplan identify a need for around 340 ha of land to 2030. This includes land for Port-related logistics (113 ha) which will overlap with the above demand forecasts for B8 warehouse development.
- 6.125 In principle, there is enough brownfield land within the City Region to meet these requirements. In practice, only a few major B8 sites are in the pipeline, including developments at Haydock; along the A5036 Dunningbridge Road, Netherton and most significantly the Parkside scheme. It is therefore very likely that strategic schemes in Warrington Borough will meet some of this need.
- 6.126 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. The final masterplan at Sci-Tech is for some 93,000 sqm of floorspace, supporting some 10,000 high quality jobs which will generate both economic benefits for Warrington and also compete with the Cheshire Science Corridor facilities. Sci-Tech has seen a range of recent investments. In West Runcorn, infill development/redevelopment at Inovyn and on the Ship Canal may prove attractive to high-tech and port linked companies that may otherwise have looked to Warrington, although detailed planning at both locations is ongoing. Finally, the redevelopment of Fiddlers Ferry for a new employment scheme, on the edge of Widnes, will deliver benefits to both Halton and Warrington.

- 6.127 In St Helens, the development of the Parkside scheme and the plans for an extension to Haydock would compete with logistics operations in Warrington, although the current phases of Omega will be complete once Parkside / Haydock commences major delivery of premises and rather it will compete with future logistics sites in Warrington Borough.
- 6.128 The release of 31.22 ha at Omega South Western Extension, Land north of Finches Plantation, Bold, to meet employment land needs arising in Warrington, is now an agreed policy in the emerging St Helens Local Plan. Some 30-40 ha of additional employment land could become available to meet cross boundary needs, if required, west of Omega South.
- 6.129 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.
- 6.130 Key issues, for Warrington, within its Wider Economic Geography, can be summarised as follows:
- Of the strategic sites which may compete with Omega, and its successors, for B2/B8 requirements Magnitude is the most significant existing site and Parkside is likely to be most significant in the future. Existing schemes in Cheshire and the Liverpool City Region, such as 3MG, Widnes, continue to grow. However, against the scale of potential needs from the growing Port of Liverpool, the programmed strategic supply in the Liverpool City Region remains modest, creating ongoing opportunities for sites in Warrington
 - 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, The Heath Runcorn, potential diversification at Inovyn, Bio Medical/Science facilities in Manchester and Liverpool, and the Cheshire Science Corridor Enterprise Zone Sites, the Economic Areas appears well catered for with science and technology themed facilities

- The proximity of Manchester City Centre, the Airport Gateway area and Salford City Centre/Salford Quays, will continue to limit demand for offices in Warrington Borough, particularly in the weakened office market of 2020/2021.

6.131 Sites in neighbouring local authority areas, even when of a strategic scale, will ultimately meet the OAN of those authorities rather than Warrington. The only exception is the proposed Omega South Western Extension, noted above, which is identified to meet cross boundary requirements.

7.0 OBJECTIVELY ASSESSED NEEDS

Introduction

7.1 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. As in the 2016 EDNA and 2019 Refresh, the methodology employed in this Update study uses two models and associated sensitivity testing, to identify OAN for Warrington Borough only. 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.

7.2 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 the updated economic forecasts (March 2021), produced by Oxford Economics and Cambridge Econometrics for Warrington Borough. This latest forecast accounts for macro-economic changes since 2019, particularly the implications of Brexit as they are presently understood and the projected long term impacts of the Covid-19 Pandemic on the local economy. Appendix 6 and 7 includes notes provided by Cambridge Econometrics and Oxford Economics on the assumptions they use for their 2021 forecasts and how these key macro-economic trends are accounted for.

Further projections are provided as an illustration of the land take requirement of a more optimistic growth trajectory for Cheshire and Warrington. This 'sensitivity testing' is taken from the revised 2017 SEP and the Northern Powerhouse, consistent with the 2019 EDNA, although both strategies are of reduced importance in the post Brexit and Covid-19 environment.

- 7.3 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.
- 7.4 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.
- 7.5 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.
- 7.2 However, in completing previous Employment Land Studies, including EDNA 2016 and 2019 Refresh, 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. Therefore, the method is not utilised in this study.
- 7.3 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 2020 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.
- 7.4 The methods, and calculations, are considered in turn.

Model 1: Historic Land Take-up

- 7.5 Employment land take-up annually is recorded by the Council. Table 20 shows the schedule of completions between 1996 and 2020 based on this data. 31.85 ha of completions was recorded in Annual Monitoring for 2018-2019, just under three quarters of it in Omega. Annual Monitoring for 2019-2020, recorded only 4.13 ha of take up and not completions at Omega. 4.13 ha is a low rate of take up compared to averages across the 1996-2020 period but not particularly low when compared to take up rates since the end of the last national recession, in 2013, if the Omega completions are excluded.
- 7.6 In total, 341.29 ha of land has been developed over 1996-2020 and that equates to an average of 14.22 ha/year. This is slightly reduced on the 2016 EDNA average of 14.65 ha/year, but somewhat higher than the 2019 EDNA Update average of 13.88 ha/year.
- 7.7 Take Up at Omega, to 2020, is 144.50 ha, with the most recent completion being the 23 ha Mountpark Phase I scheme. Mountpark Phase II has now commenced delivering a further, 12.70 ha (see Section 4.0). Once it is completed, the employment land in Omega South will be fully occupied. Omega North is already fully developed.
- 7.8 Clearly, the scale of this development, which accounts for 42.3 percent of all completions since 1996 has a big impact on take up rates. Indeed, excluding Omega the annual take up rate reduces to 8.20 ha/year, reduced from 8.36-9.16 ha/year in past EDNAs.
- 7.9 As was noted in the 2016 and 2019 EDNAs, 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 14.22 ha/year, and a local projection excluding Omega of 8.20 ha/year. A strategic only scenario is not considered as it would only be based on a short period, six years, of intense recent take up at Omega that may not reflect real future demand across the next 20 years.

Table 20 – Employment Land Take-Up 1996-2020

Year	Total, ha	Comments
1996-1997	9.06	
1997-1998	12.41	
1998-1999	9.43	
1999-2000	21.80 (13.99 less Omega)	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
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
2016-2017	8.08 (0.43 less Omega)	7.65 at Omega – Amazon
2017-2018	4.26 (0.15 less Omega)	4.11 ha at Omega – Dominos and Haydock Commercial Vehicles
2018-2019	31.85 (8.85 less Omega)	23 ha at Omega – Mountpark Phase I
2019-2020	4.13	
Total	341.29 =14.22/year. Less Omega 196.79 = 8.20/year	

Source: WBC/BE Group, 2021

7.10 Using the strategic/local projection take-up rate, inclusive of Omega, and applying

it to the Local Plan period 2021-2038 (18 years), Warrington requires 255.96 ha of land to 2038, i.e.

$$14.22 \text{ ha/year} \times 18 \text{ (years)} = \mathbf{255.96 \text{ ha}}$$

7.11 Using the local take-up rate, exclusive of Omega, reduces the need to 147.60 ha, i.e.

$$8.20 \text{ ha/year} \times 18 \text{ (years)} = \mathbf{147.60 \text{ ha}}$$

7.12 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 2038 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2038. There is no set guidance on how long this buffer should be, however, in over 65 employment land studies completed by BE Group over the last 15 years, a buffer of 3-5 years has usually been applied. This has been identified as an acceptable margin in Local Plan Examination's in Public (EIP's), in which BE Group's employment needs assessments have been appraised.

7.13 In this case a three year buffer is used, rather than five. Reasons for this include:

- The desire to limit the impact on local Green Belt, where possible, given that sizable greenfield development will likely already be required to meet the baseline OAN
- The fact that the bulk of Warrington's stock of E(g)/B2/B8 premises is modern and well occupied. A lot of the older stock/surplus land which could be converted to other uses, such as housing or retail/trade, has already been converted so further large scale changes of use are unlikely outside of Central Warrington. In Central Warrington the loss of employment land and property through regeneration programmes is allowed for in this Study (see below and in Section 4.0). Thus, there is a more limited need to allow a buffer specifically to account for land lost to other uses, as might be the case elsewhere.

7.14 Based on the historic take-up trend this would generate the following further land needs:

$$\text{Strategic/Local Take Up Trend: } 14.22 \text{ ha/year} \times 3 \text{ (years)} = \mathbf{42.66 \text{ ha}}$$

Local Take Up Trend: 8.20 ha/year x 3 (years) = **24.60 ha**

- 7.15 Added to the 2038 need figure, this increases the requirement as follows:

Strategic/Local Take Up Trend: 255.96 ha + 42.66 ha = **298.62 ha**

Local Take Up Trend: 147.60 ha + 24.60 ha = **172.20 ha**

- 7.16 Finally, an analysis of the projected impact of Warrington Town Centre/Southern Gateway masterplanning suggests additional land needs of 17.64 ha, to accommodate firms displaced from housing redevelopment sites (see Section 4.0). Incorporating this requirement increases the needs to:

Strategic/Local Take Up Trend, plus a buffer: 298.62 ha (need) + 17.64 ha
(allowing for displacement) = **316.26 ha (final requirement)**

Local Take Up Trend, plus a buffer: 172.20 ha (need) + 17.64 ha
(allowing for displacement) = **189.84 ha (final requirement)**

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

- 7.18 Section 4.0 identifies the realistic 2021 land supply scenario as 38.87 ha, of which 26.17 ha is largely local supply. This could require the Council finding a further 163.67 ha to meet local needs, increasing to 277.39 ha if a mixed local/strategic requirement is allowed for:

Strategic/Local Take Up Trend, plus a buffer: 316.26 ha – 38.87 ha
(realistic supply, strategic and local combined) = **277.39 ha (further need)**

Local Take Up Trend, plus a buffer: 189.84 ha – 26.17 ha
(realistic supply, local only) = **163.67 ha (further need)**

- 7.19 These final needs figures are largely the same those in the 2019 EDNA Update for Strategic/Local Needs, i.e. 277.80 ha. The Local only need has reduced by some 36 ha from 199.77 ha in 2019.

Split by Use Class

- 7.20 Whilst overall need is important, further analysis can evaluate what the potential needs will be in the different use classes. Table 21 splits the 1996-2020 take up by

the main employment use classes (E(g) (i, ii, iii), B2, B8).

Table 21 – Employment Land Take-Up 1996-2020, by Use Class

Completion Period	Use Class						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	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	-	0.70	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	0.10	3.8
2004-2005	9.87	-	-	4.32	-	-	14.19
2005-2006	3.87	-	0.90	0.91	4.00	-	9.68
2006-2007	10.99	-	1.99	0.7	1.1-	2.80	17.58
2007-2008	3.92	-	0.98	2.51	-	-	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
2016-2017	-	-	-	-	8.08	-	8.08
2017-2018	-	-	0.15	1.32	2.79	-	4.26
2018-2019	-	-	-	2.91	28.94	-	31.85
2019-2020	-	-	-	4.13	-	-	4.13
Total (percent) Inclusive of Omega	79.58 (23.4)	-	16.76 (4.9)	29.99 (8.8)	194.02 (56.8)	20.94 (6.1)	341.29 (100.0)
Total (percent) Excluding Omega	79.58 (40.4)	-	16.76 (8.5)	28.67 (14.6)	50.84 (25.8)	20.94 (10.6)	196.79 (100.0)

Source: WBC/BE Group, 2021

7.21 Therefore, projecting the historic split of land need forward for the period to 2038, and differentiating between strategic and local growth options, Table 22 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 defined in Section 4.0 and split, in that section, by (E(g)/B2/B8 uses. The Further Need, by use class, for this model can then be identified.

Table 22 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed	
<i>Percentage - Inclusive of Omega</i>	23.4	-	4.9	8.8	56.8	6.1	100.0
Strategic/Local Take Up Trend	74.00	-	15.50**	27.83**	179.64**	19.29	316.26
2021 Realistic Supply, by Use Class*	1.15	-	8.22***		11.76***	17.74	38.87
Further Needs	72.56		34.26		162.18	8.39	277.39

Source: WBC/BE Group, 2021

*Strategic and Local Supply.

**The displaced businesses of Central Warrington, if office tenants are excluded, are almost exclusively industrial. For the purposes of this exercise the need they generate (17.64 ha) is split evenly between E(g)(iii), B2 and B8 storage use

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

7.22 Comparison between the Strategic/Local Take-Up Model and strategic/local land supply, shows a substantial shortfall in B8 land, of 162.18 ha. Comparison with the equivalent need in the Local only model (Table 23, below), suggest that 117.96 ha (72.7 percent) of this would be of a strategic nature. There is also a sizable unmet need for offices of 72.56 ha, plus a more modest requirement for some 38.15 ha of E(g)(iii)/B2 industrial land.

7.23 Table 23 undertakes the same exercise for the Local Take-Up Model, comparing that need against the identified local only realistic supply (26.17 ha). Only the B8 requirement changes significantly. B8 need is 44.22 ha, an indication of what proportion of that need is locally based.

Table 23 – Full Need, Split by Use Class – Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed	
<i>Percentage - Excluding Omega</i>	40.5	-	8.5	14.6	25.8	10.6	100.00
Local Take Up Trend	76.89	-	16.14**	27.72**	48.98**	20.12	189.84
2021 Realistic Supply, by Use Class*	1.15	-	1.87		5.41	17.74	26.17
Further Needs	75.45	-	34.78		44.22	9.22	163.67

Source: WBC/BE Group, 2021

*Local Supply only.

**The displaced businesses of Central Warrington, if office tenants are excluded, are almost exclusively industrial. For the purposes of this exercise the need they generate (17.64 ha) is split evenly between E(g)(iii), B2 and B8 storage use

Model 2A: Employment Based Forecast – Baseline Forecast

- 7.24 Work has been completed using a number of economic forecasts. The EDNA completed in 2016 used 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 projected employment change from 2016 to 2037 (or 2025 in the case of the Cheshire and Warrington model). In addition, the models available include 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.
- 7.25 The 2019 EDNA Update used a 2018 model from Oxford Economics, which makes allowance, where possible, for national/regional economic change over the last two years.
- 7.26 This further refresh (2021) has considered new economic forecasts from Oxford Economics and Cambridge Econometrics.

Employment

- 7.27 The forecasts used for the work break down the projections into industrial sectors. In the case of Oxford Economics 19 sectors are provided and these exactly map on

to the ONS data for sector-based employment. The Cambridge Econometrics data includes 12 sectors. The model provides employment change during the projected time periods and allows those jobs relevant to E(g)/B-Class employment land to be identified. It should be noted that these models provide 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 this study considers some reasonable sensitivity analysis to examine potential 'policy on' scenarios.

- 7.28 The Cambridge Econometrics data, providing information at a 12-sector level, has some limitations which are not encountered with the Oxford Economics data. On this basis the Oxford data has been used as the primary source where greater sector granularity is required.
- 7.29 One area where the Oxford Economics data does provide an important distinction is in breaking down the classification of 'Wholesale and retail trade; repair of motor vehicles and motorcycles'. Oxford Economics data provides a breakdown of retail employment which is important to strip away in the consideration of additional E(g)/B-Classes of employment land.
- 7.30 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. Covid-19 and Brexit are examples of these impacts and economic uncertainty remains on the exact economic impact of both.
 - The longer term the data, more variation away from the forecast 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 and the level of local knowledge feeding into the disaggregation is *poor*.

Comparing the Oxford Projections – 2016, 2018, 2021

- 7.31 The overall Oxford job growth projections are set out in Table 24 below, comparing the Oxford 2021 figures with those used in the previous two EDNAs.

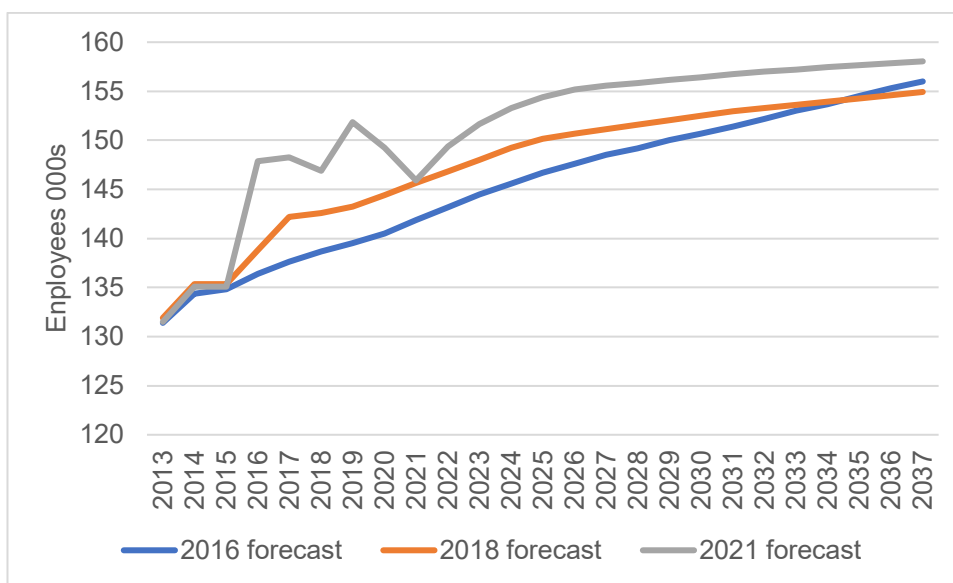
Table 24 – Jobs Growth Projections

Forecasts	2013	2015	2017	2025	2037
Oxford Economics (May 16)	131,400	134,800	N/A	146,700	156,100
Oxford Economics (Jan 18)	131,900	135,300	142,200	150,100	154,900
Oxford Economics (Mar 21)	131,500	135,100	148,300	154,400	158,000

Source: Oxford Economics, 2016, 2018 and 2021

7.32 It can be seen from the table above that, since 2016, Oxford Economics have increased their estimate of employment growth for recent past years (2015 and 2017) and expect this stronger predicted employment growth to continue to 2025, and beyond. The net effect is that by 2037, the latest year covered by all three forecasts, employment is predicted to be 1,900 jobs higher than it originally forecast (see Figure 15).

Figure 15 – Oxford Employment projections for Warrington 2013-2037



Source: Oxford Economics, 2016, 2018 and 2021

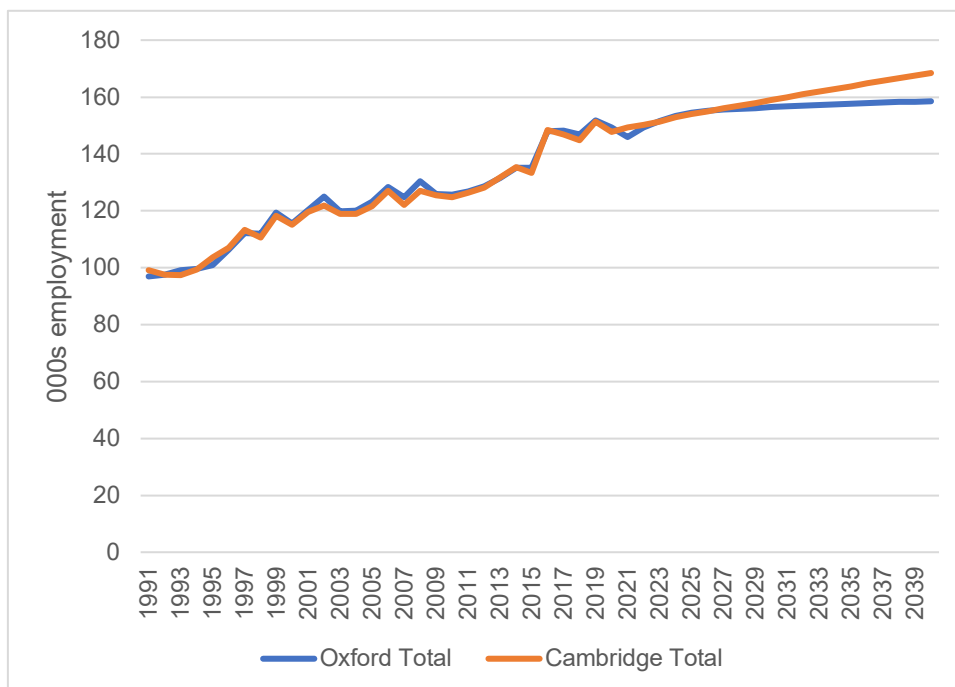
7.33 One of the most important variants in the three forecasts however is the estimated current position, since is the base from which compound employment growth arises. The 2017-2019 employment position was significantly stronger than Oxford had envisaged in 2016, thus later forecasts reflect this greater strength in those years.

Comparing the Oxford and Cambridge 2021 Projections

7.34 Growth projections do not only vary between years, but they also vary between forecasters. The long term historic – future employment patterns projected by the

two firms are shown in Figure 16.

Figure 16 – Oxford Economics and Cambridge Econometric Employment Estimates and Forecasts for Warrington BC (2021)



Source: Oxford Economics and Cambridge Econometrics, 2021

7.35 The difference between the two forecasts at the end of the forecast period in 2040 is shown in Table 25 with Cambridge Econometrics forecasting employment in Warrington at a level 9,900 jobs higher than the position forecast by Oxford Economics by 2040. The categories of employment have been established at a high level for ease of reference.

Table 25 – Difference in Forecasts at 2040*

	Difference in Jobs (Positive Figure shows where Cambridge Econometrics is higher)
Primary	500
Manufacturing	1,400
Utilities	200
Construction	(1,600)
Transport, distribution and retail	3,500
Accommodation & food services	4,400
Private sector services	(4,700)
Government services	6,000

	Difference in Jobs (Positive Figure shows where Cambridge Econometrics is higher)
Other services	200
Total	9,900

Source: Oxford Economics and Cambridge Econometrics, 2021

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

- 7.36 Forecasting employment growth is extremely challenging since it requires significant assumptions to be made concerning the economic impact of the Covid-19 Pandemic and any subsequent economic recovery whilst at the same time over-laying the impact of Brexit.
- 7.37 Cambridge Econometrics have taken a more optimistic position on overall prospects and expect a stronger bounce back in consumer spending reflected in the Accommodation and food service and Retail sectors. Cambridge Econometrics also forecast employment growth to be higher than the Oxford Economics in the public sector, with the reverse position in private office-based sectors.
- 7.38 In effect the forecasts are about how badly trend growth will be hit by Covid-19 and Brexit as Table 26 below shows.

Table 26 – Decade Trend Employment Growth in Forecasts (Percent Change)

	2010-2019	2020-2029
Oxford Economics	20.9	4.6
Cambridge Econometrics	21.4	6.9

Source: Oxford Economics and Cambridge Econometrics, 2021

- 7.39 Both forecasting companies expect trend growth to have been impacted but Oxford expect the impact to be more significant.
- 7.40 Given that the Oxford forecast starts from a higher position than Cambridge, but then takes a more pessimistic longer-term view, despite having been too pessimistic on growth in Warrington in previous forecasts, there is some rationale to consider a mid-point between the two forecasts although both have been provided to allow comparison.

New Forecasts 2021-2038 (Plan Period)

- 7.41 Growth projections for the 2021-2038 forecast period are summarised from both Oxford Economics and Cambridge Econometrics in Table 27. 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 has been amalgamated to a 12-sector category level for the purposes of this report.

Table 27 – Employment Change by Employee Numbers 2021-2038*

Sector	Oxford	Cambridge
Agriculture, etc.	0	0
Mining and quarrying	0	0
Manufacturing	(2,100)	(1,100)
Electricity, gas and water	(300)	0
Construction	1,400	400
Distribution	500	500
Transport and storage	200	600
Accommodation and food services	500	4,100
Information and communications	300	700
Financial and business services	9,400	6,700
Government services	1,700	5,300
Other services	900	100
Total	12,500	17,300

Source: Oxford Economics, Cambridge Econometrics 2021

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

7.42 The forecasts do not only vary in their forecast for scale of growth, they also vary by the sectors predicted to show the strongest growth. Cambridge Econometrics forecast the strongest growth and base this stronger growth on employment increases (above that of Oxford Economics) in accommodation and food service. Conversely, Oxford Economics expect higher growth (than Cambridge Econometrics) in construction and financial and business services. The net effect is that, over the plan period, Cambridge Econometrics forecast and increase of 4,800 more jobs than Oxford Economics.

7.43 In terms of sectors relevant to E(g)/B-Class employment land, both forecasts predict the strongest growth to be in the financial and business services sector with 6,700 or 9,400 jobs forecast to be created before 2038. The forecast also predicts an increase (albeit more modest) in employment in ICT, government services and other services. When these results are aggregated Oxford Economics predict a further 12,300 jobs (14 percent increase) in sectors likely to require E(g)(i) office

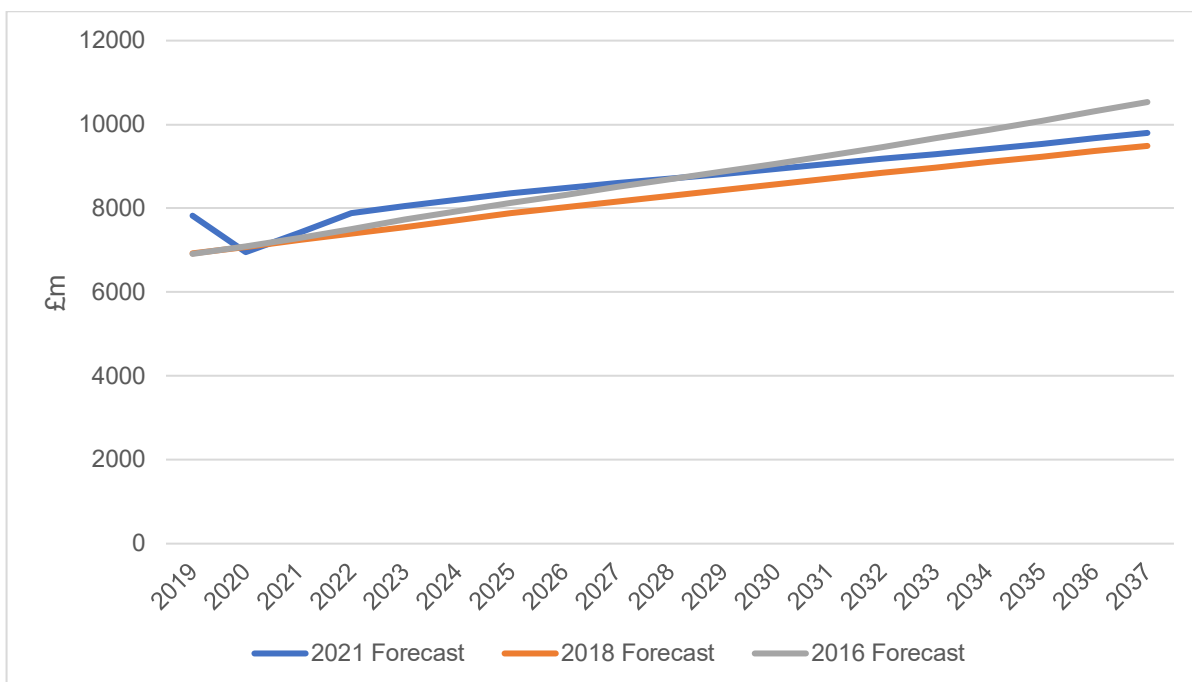
accommodation whilst Cambridge calculate the equivalent figure at 12,800 (15 percent increase).

- 7.44 The Oxford forecast also predicts growth in construction, accommodation and food services adding a further 1,900 jobs over the period. The equivalent figure from Cambridge Econometrics is 4,500 jobs.
- 7.45 The forecasts predict modest growth in distribution, of 500 jobs (both forecasts) and this reflects a forecast growth in wholesale and retail in the economy, which will include increasing e-commerce.
- 7.46 Manufacturing is predicted to continue its decline in Warrington. Oxford Economics predict a further reduction of 2,100 jobs in the sector and Cambridge Econometrics a more modest decline of 1,100.

GVA

- 7.47 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.
- 7.48 The Oxford forecast sets out predictions for GVA growth and these are illustrated in Figure 17 and Table 28 show a comparison to the previous Oxford Forecast (this analysis only considers the Oxford Forecast as this was the only forecast used at each EDNA update).
- 7.49 It is interesting to note that since 2016 the economic forecast for Warrington has estimated a reduction in GVA over the forecast period. Overall, the GVA forecast in 2021 by the year 2037 is 7 percent lower compared to the 2016 forecast. This equates to lower output of £0.7 billion.

Figure 17– Forecast GVA Growth to 2037 (£million)



Source: Oxford Economics 2016, 2018 and 2021

Table 28 – GVA Growth Forecasts Plan Period 2021-2038

	GVA (Percent increase 2021-2038)	GVA Annual compound increase, percent
Oxford Economics	33.9	1.73
Cambridge Econometrics	31.8	1.63

Source: Oxford Economics and Cambridge Econometrics, 2021

- 7.50 It is worth noting that, even with the downward revision, the forecast has 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 past national level of growth to 2038 then the jobs increase, and hence the land need, would be smaller than is forecast here.
- 7.51 It is also worthy of note that Oxford Economics anticipate a higher level of economic growth but a lower employment outcome. Their model assumes a higher productivity gain in the UK economy over the period, i.e., individual workers will produce more GVA.

Assessing Objectively Assessed Needs

7.52 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 2038, 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 2038 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.

7.53 These assumptions are summarised in Table 29.

Table 29 – 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.

Industry Sector	Employees		
	Percentage of Staff Occupying B1, B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
			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
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

7.54 Using the adjustments shown in Table 29, 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.

7.55 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 30 show these calculations. Sectors showing jobs growth resulting a positive land requirement are shown separately from jobs reductions.

Table 30 – Employment Based Forecast 2021-2038*

Growth Sectors	Oxford Economics
Total Floorspace, sqm	149,134
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Needed, ha	38.24

Sectors in Decline	Oxford Economics
Total Floorspace, sqm	(98,921)
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Reduction, ha	(25.36)

<i>Net Land Need, ha</i>	12.88
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Growth Sectors	Cambridge Econometrics
Total Floorspace, sqm	142,023
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Needed, ha	36.42

Sectors in Decline	Cambridge Econometrics
Total Floorspace, sqm	(50,290)
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Reduction, ha	(12.89)
<i>Net Land Need, ha</i>	23.53

Source: BE Group, 2021

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

7.56 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 12.88 ha using the Oxford Economics forecast and 23.53 ha using the Cambridge Econometrics forecast (and a land requirement based on the mid-point of 18.2 ha).

7.57 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in the model. 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.

7.58 Thus, there is a case for looking at the land need resulting from sectors predicted to grow only. This gives a need of **36.4 – 38.2 ha (or a mid-point between forecasts of 37.3)**.

7.59 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

7.60 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 from public policy and programmes. 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 2017 SEP and further LEP growth projections.

- 7.61 The projections are only provided as an illustration of the land take requirement of a more optimistic growth trajectory for Cheshire and Warrington. It is noted that post-Brexit and as a result of the Covid-19 pandemic such growth strategies have been down-played and the LEP is now considering Covid-19 recovery plans and seeking to mitigate employment loss. As there is currently no longer a requirement for a Local Industrial Strategy and the pre-Covid 19 draft strategy was never formally adopted, Cheshire and Warrington does not currently have an agreed and current economic strategy.

Sensitivity Test One – Strategic Economic Plan

- 7.62 The 2017 SEP had set out a target that by 2040 Cheshire and Warrington would become a £50 billion economy creating 120,000 new jobs and 127,000 new homes.
- 7.63 The SEP outlined a mixture of geographic and functional programmes to support this growth prospect including sections on specific initiatives many of which have been re-named or disbanded but which essentially build on prospects arising from HS2 and the continued growth of the most successful economic areas of the LEP area (including Warrington). The geographic programmes in the SEP do not restrict employment growth projections to a single local authority area and as such a general apportionment of the projected growth is appropriate.
- 7.64 To permit some level of apportionment of SEP predicted growth, 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 31 shows what proportion of the three factors should be applied to Warrington.

Table 31 – Apportionment of economic outputs across the LEP

	Proportion in Warrington, Percent
GVA	23.1
Population	22.6
Employment	26.8

Source: Mickledore, 2021

- 7.65 If the 2017 work which developed the SEP, is apportioned on this this basis, the employment growth predicted in the SEP would suggest that Warrington would increase its employment by 32,160 jobs to 2040 (or on a straight-line basis 29,363 by 2037).
- 7.66 This ‘policy on’ position is more ambitious than the forecast position predicted by Oxford Economics. Oxford Economics forecast 12,700 jobs to 2038 (see Table 32).

Table 32 – Comparison of SEP with Baseline Economic Forecasts

	2017	2038
SEP, jobs	-	+109,565
Warrington, percent		26.8
Warrington employment, jobs		+29,363
Oxford forecast, jobs	148,300	+9,900
Cambridge forecast, jobs	146,800	+19,800
<i>SEP difference from Oxford, jobs</i>		+19,463
<i>SEP difference from Cambridge, jobs</i>		+9,563

Source: Oxford Economics, Cambridge Econometrics, Cheshire and Warrington LEP, 2017, 2021

- 7.67 Applying a ‘policy on’ scenario incorporating the SEP target would deliver a jobs to land target significantly different from those already set out in Model 2A. On this basis the SEP provides a useful sensitivity variation away from the Oxford Economics and Cambridge Econometric forecasts as an illustration of a more positive employment growth trajectory.
- 7.68 Using a combination of the Oxford Economics and Cambridge Econometrics Forecast as a base, Table 33 and Table 34 shows the expected proportional split of employment in Warrington, by sector, in 2038 according to the differing forecasts.

Table 33 – Proportions of Warrington Employment – Oxford Economics Forecast 2038

Sector	Percent
Agriculture, etc.	0.09
Mining and quarrying	0.01
Manufacturing	2.97
Electricity, gas and water	1.34

Construction	7.75
Distribution	13.68
Transport and storage	6.81
Accommodation and food services	4.61
Information and communications	2.93
Financial and business services	36.77
Government services	19.13
Other services	3.92

Source: Oxford Economics, 2021

Table 34 – Proportions of Warrington Employment – Cambridge Econometrics Forecast 2038

Sector	Percent
Agriculture, etc.	0.38
Mining and quarrying	0.01
Manufacturing	3.60
Electricity, gas and water	1.39
Construction	6.44
Distribution	14.31
Transport and storage	7.00
Accommodation and food services	6.81
Information and communications	3.10
Financial and business services	31.75
Government services	21.40
Other services	3.81

Source: Cambridge Econometrics, 2021

- 7.69 Applying the Oxford Economics split to the additional jobs in the SEP over their forecast suggests that of the extra 19,463 jobs, 12,200 jobs will be in office/technical based environments and a further 900 jobs in warehouse/industrial environments. This is consistent with the sectors identified in the SEP (the balance would be in non-B use classes).
- 7.70 Applying the Cambridge Econometrics split to the additional jobs in the SEP over their forecast suggests that of the 9,563 jobs, 5,744 jobs will be in office/technical based environments and a further 3,167 jobs in warehousing/industrial environments. This reflects a significant difference in sector splits between the two forecasts.

7.71 This additional ‘policy on’ employment will create an additional development land requirement as follows in Tables 35 and 36 according to the Oxford forecast and in Tables 37 and 38 according to the Cambridge forecast.

Table 35– Additional Floorspace from ‘Policy On’ Position using Oxford forecast

Sector	Additional employment	Percentage of employment in premises, percent	Floor space required per person, sqm	Total Floor space required, sqm
Distribution, Transport and Storage	900	48	70	30,240
Business services, etc.	12,200	100	12	146,400
Total				181,042

Source: BE Group and Mickledore, 2021

Table 36 – Additional Land Need from ‘Policy on’ Position using Oxford forecast

Sector	Total Floor space required, sqm	Development space, sqm per ha	Total land required, ha
Distribution, Transport and Storage	30,240	3,900	7.75
Business services, etc	146,400	3,900	37.54
Total	181,042		45.20

Source: BE Group and Mickledore, 2021

Table 37 – Additional Floorspace from ‘Policy On’ Position using Cambridge forecast

Sector	Additional employment	Percentage of employment in premises, percent	Floor space required per person, sqm	Total Floor space required, sqm
Distribution, Transport and Storage	3,167	48	70	106,411
Business services, etc.	5,744	100	12	68,928
Total				175,339

Source: BE Group and Mickledore, 2021

Table 38 – Additional Land Need from ‘Policy on’ Position using Cambridge forecast

Sector	Total Floor space required, sqm	Development space, sqm per ha	Total land required, ha
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Distribution, Transport and Storage	106,411	3,900	27.28
Business services, etc	68,928	3,900	17.67
Total	181,042		44.95

Source: BE Group and Mickledore, 2021

7.72 The conclusion is therefore that using the 2017 SEP as the basis for the employment land requirement would result in an additional land requirement over the current forecasts of some 44.95 ha - 45.20 ha depending on the forecast used – but with negligible net effect.

Sensitivity Test Two – Northern Powerhouse Forecasts

7.73 The economic growth potential of the North of England has been the focus of considerable discussion because of the Northern Powerhouse initiative. In June 2016, the Northern Powerhouse Independent Economic Review (NPIER) was published. Whilst this is now 5 years old, the NPIER was recognised as a route map for changing the economic ambition of the North of England – and the Warrington Means Business Strategy refresh 2020 continues to cite the economic ambition of the Northern Powerhouse, Transport for the North and the ‘Northern Power Towns’.

7.74 The NPIER set out a transformational account of the Northern Powerhouse as a region that could add 850,000 jobs by 2050. In light of Brexit and Covid-19 impacts this strategy perspective has largely been abandoned but is provided as an illustration of the land take estimates from the most optimistic strategy of recent years.

7.75 Allocating an appropriate level of this growth to Warrington inevitably requires several assumptions to be made:

- The first assumption is that the 850,000 are secured on a straight-line basis from 2017 to 2050 (33 years) albeit it is likely that economic momentum would increase employment more rapidly at the end of the period. Even apportionment would suggest that 550,000 jobs created by 2038.
- The second assumption is that Warrington secures the same proportion of this employment growth as its share current share of employment across the Northern Powerhouse area.

- 7.76 In fact, Warrington represents just two percent of the employment across the Northern Powerhouse region and if the levels of growth predicted in the NPIER were secured and apportioned evenly, Warrington would secure employment growth of 11,000 in the period 2017-2038.
- 7.77 This is only slightly higher than the employment levels forecast by Oxford Economics in the same period (9,900) and lower than that forecast by Cambridge Econometrics (19,800) thus undertaking a forecast model from these figures would not generate an output much different from the Baseline Forecasting of Model 2A. The forecasts go some way to validating the original NPIER work rather than creating a further realistic sensitivity analysis.

Employment Land Take-Up/Employment Change Comparison

- 7.78 The accuracy of the Base employment forecast of this Study can be questioned given how much the Oxford employment forecasts have changed in the last five years. Growth over 2015-2021 is now considered to have been 4,000 employees higher than was forecast in 2016 and this is despite an apparent 6,000 fall in employment between 2019-2021 because of the Covid-19 Pandemic. Given that, at the time of writing at least (Apr 2021) the nature of the UK's post Brexit and Covid economy, and the global economy generally, remain uncertain, it is impossible to say if these 2021 long term projections are in any way accurate.
- 7.79 The Cambridge forecasts have shown similar volatility and predict a higher upturn in the forecast period 2021-2038 to the extent that there is a strong argument to take a mid-point between the two.
- 7.80 In addition, 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
- Due to the Covid-19 Pandemic, the focus has been on working from home where possible. This trend is likely to continue to some degree moving forward, meaning some companies will need less space even if they increase their workforces, as most staff will be fully/partly working from home. Conversely, some firms may need more space, relative to the number they employ, if they wish to continue social distancing practices after 2021.

7.81 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, the Oxford Economics baseline (policy-off) forecast is used. This is shown in Table 39.

Table 39 – Employment Land Take-Up/Employment Change Comparison 1996-2020 (Oxford Economics)*

Employment Change	Total Jobs	Land (Ha)
Growth	55,000	149.58
Decline	(6,650)	(79.13)
Net growth / (loss)	48,350	70.5
Historic land take-up	-	341.29 (196.79 less omega)

Source: Oxford Economics, WBC, BE Group, Mickledore 2021

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

7.82 The Cambridge growth forecast over the same period, employment growth of 40,000, would have resulted in a lower forecast land take over the same period.

7.83 Table 39 shows that net jobs growth during the period, would have resulted in more modest land needs between 1996-2021 which represent only a fraction of what was taken up.

7.84 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 period, there is still a sizable shortfall between the anticipated land 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

7.85 The six alternative forecast options have been produced and considered for the period of 2021-2038, for Warrington Borough. The calculations for each are summarised in Table 40 and show varied outcomes.

7.86 The need calculated in each model allows for a three-year buffer to allow for choice and potential change in needs during the Plan Period as well as accounting for limited further possible losses in the supply. The realistic land supply, as identified in Section 4.0, is then deducted from gross need. A distinction is made between the realistic local supply of employment land, 26.17 ha, and the strategic supply at Omega, a further 12.70 ha (i.e. 38.87 ha total strategic/local supply).

7.87 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 24 years, onwards to 2038. The strategic modelling now benefits from seven years of take up evidence at Omega showing the level of completions which can be achieved in Warrington for larger B2/B8 premises, in the contemporary market, when appropriate land is available.

7.88 Under a strategic/local scenario the overall further need is 277.39 ha, largely the same as the 276.37-277.80 ha required in the two previous EDNAs. Under a local only scenario, which makes no allowance for strategic growth, the remaining need is 163.67 ha, reduced from the 199.77-203.31 ha requirement of past studies.

Table 40 – Warrington Borough Land Forecast Models – Summary

Model	Need (A+B+C)			Less Supply (D)	A+B+C-D=Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Oxford Modelling = Further 45.20 ha of land need	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Cambridge Modelling = Further 44.95 ha of land need.	Assumptions
	A: Land Need 2021-2038, ha	B: Buffer (three years further need) ha	C: Allowance for business displacement associated with Warrington Town Centre Development projects	D: Land Stock 2021, ha – Strategic and/or Local Supply*				
Strategic/ Local Take Up	255.96	42.66	17.64	38.87 Strategic/ local supply	(277.39)	-	-	Based on historic (24 years) take-up of 14.22 ha/pa. Inclusive of seven years take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture SEP figure not applicable to take-up scenarios Of this, strategic need would be approx. 117.96 ha.
Local Take Up	147.60	24.60	17.64	26.17 Local supply	(163.67)	-	-	Based on historic (21 years) take-up of 8.20 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture SEP figures not applicable to take-up scenarios
Employment based on adjusted stock – Oxford Economics Model	+38.24 Growth +12.88 Change	+6.36 +2.16	17.64	26.17 Local supply	1)(36.07) 2) (6.51)	1) (81.27) 2) (51.71)	-	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	+36.42 Growth +23.53 Change	+6.06 +3.96	17.64	26.17 Local supply	1)(33.95) 2) (18.96)	-	1) (78.90) 2) (63.91)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore, 2021

*Realistic land supply at March 2021

- 7.89 If employment-based forecasts are taken, then net further requirements range from 6.51 ha to 36.07 ha. As the forecasts primarily measure local prospects for job growth they are compared to the local land supply only. Both of the forecasts take somewhat differing views about exactly when, and to what extent the economy will recover from the Covid-19 Pandemic. To reflect this uncertainty, it could be advisable to take a midpoint between the two, giving needs of 21-43.50 ha.
- 7.90 An illustrative only higher growth scenario, based on the jobs targets of the SEP, would boost those needs by an additional 45 ha on top of each total.
- 7.91 However, from the market assessment and reviewing the historic trends in employment change and land take up (along with uncertainties in long term forecasting generally) this approach suggests that employment land needs are underestimated. When a comparison of past employment change over the period 1996-2020 is made, actual land take-up is many times more than the estimate put forward by the growth only approach.
- 7.92 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 2038, with an ongoing strong demand for strategic B2/B8.
- 7.93 Warrington’s previous take up can be split by the main employment use classes. Table 41 applies the same proportionate split to the Borough’s projected supply shortfall, to 2038, under the Local/Strategic Take-Up Model. A strong need for further B8 land is noted, of which 72.7 percent (117.96 ha) is identified as being primarily strategic in nature. Some 73 ha of E(g)(i) office land would also be required under this model although market evidence suggests the real need for office land will be considerably smaller.

Table 41 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed	
<i>Percentage - Inclusive of Omega</i>	23.4	-	4.9	8.8	56.8	6.1	100.0

Strategic/Local Take Up Trend	74.00	-	15.50**	27.83**	179.64**	19.29	316.26
2021 Realistic Supply, by Use Class*	1.15	-	8.22***		11.76***	17.74	38.87
Further Needs	72.56		34.26		162.18	8.39	277.39

Source: WBC/BE Group, 2021

*Strategic and Local Supply.

**The displaced businesses of Central Warrington, if office tenants are excluded, are almost exclusively industrial. For the purposes of this exercise the need they generate (17.64 ha) is split evenly between E(g)(iii), B2 and B8 storage use

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

8.0 CONCLUSIONS

Introduction

- 8.1 This study has included a wide-ranging look at the factors affecting Warrington's economy, with reference to those that are likely to affect the future need for land and property within the Borough. It provides an update to the 2016 Warrington EDNA study and 2019 EDNA Update, reflecting changes in strategic policy, recent major events such as the Covid-19 Pandemic and Brexit, the ongoing Warrington Local Plan development process and changing local demand and supply conditions. 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 9.0.
- 8.2 The study has been undertaken in line with both the revised National Planning Policy Framework (2019) and relevant Planning Practice Guidance.

Property Market Assessment

- 8.3 In response to the Covid-19 Pandemic and resulting national lockdowns, a greater part of the retail and wholesale market moved online. This growth in e-commerce has boosted an already strong logistics market. Bolstered by the strongest fourth quarter ever recorded – 14.3 million sqft (1.33 million sqm) – annual national take-up of logistics space soared to an all-time high of 50.4 million sqft (4.68 million sqm) in 2020.
- 8.4 The North West reflects this high demand but lacks the supply to fully capitalise on this growth. Some sources suggest that against present property take up rates for strategic B2/B8 premises, the region has just over a year's supply remaining. This is reflected in Warrington where only 12.7 ha remains at Omega and that 12.7 ha will be taken up by 2022. Unsurprisingly, given this limited supply, stakeholders are clear that the Borough needs further land allocations. As in 2016 and 2019, where growth locations are mentioned, South East Warrington is put forward to take advantage of the key M56/M6 links and provide strategic B2/B8 options. Fiddlers Ferry is also seen as a desirable B2/B8 location, but its distance from the motorways makes it of secondary interest compared to South East Warrington.

Industrial Market

- 8.5 Reflecting buoyant national and regional markets, local property market stakeholders stated strong demand for industrial and warehouse premises across a range of sizes

up to 9,000 sqm. Within this, both micro/small business accommodation of sub 1,500 sqm and larger mid-sized and big box units seem to be all in good demand. There is continued demand for strategic logistics units of 9,000- 35,000 sqm to compete in the regional/national market.

- 8.6 Reported rents vary depending on unit size. Prime rent for a high quality unit under 2,000 sqm sits at around £7.75/sqft (£83/sqm). For 'big box' units, prime rent appears to be around £7/sqft (£75/sqm), rising slightly to £7.20/sqft (£78/sqm) at Omega where a shortage of supply has pushed up rents.
- 8.7 In 2020 the total industrial floorspace transacted in the Borough increased to 145,300 sqm, 120 percent higher than the total from the year before and the highest since 2014. Some of this reflects take up at Omega, but it is still evidence of how well local market activity has held up, and even improved, during the Covid-19 Pandemic.
- 8.8 As of February 2021, there was 248,048 sqm of vacant industrial floorspace being marketed in Warrington, within 75 properties. The available floorspace recorded in 2021, is significantly larger than that recorded in the 2019 Update EDNA (172,662 sqm). This reflects the greater availability of medium-large units in Warrington, greater than 2,000 sqm in size – 26 today, against 19 in 2018.
- 8.9 However, even with these exceptional properties included, available supply still only accounts for 13.0 percent of total supply by floorspace and 4.0 percent by premises numbers. This continues to point to a lack of availability and choice for businesses. While more very large units are available today, the number of units available overall has reduced by 41 percent from 123 in the 2016 EDNA. Although the supply of available smaller units was somewhat better in 2021 than in the 2019 EDNA, there was still only modest availability in the 0-100 sqm and 501-2,000 sqm ranges

Warehouse Market

- 8.10 Strategic market demand is increasingly led by the e-commerce sector and wholesale supply over B2 manufacturing. Indeed, established local manufacturers such as Unilever have been reducing their operations in Warrington and releasing some land for other uses.
- 8.11 The 144.50 ha of development at Omega has overwhelmingly been for B8 uses over B2, with the most recent letting being to food delivery company Gousto. Stakeholders

feel the strength of the logistics market will remain over the long term and will support further strategic development schemes in the Borough. As noted above, strategic demand is normally for units of up to 35,000 sqm, of which there is a shortfall now Omega is almost full.

Office Market

- 8.12 As a high proportion of Warrington's office staff worked from home in 2020/21, the Borough's office market saw some of its weakest recent performance. In 2020 there were just 29 office deals completed, a nine-year low. Excluding two exceptionally large transactions by the Council, only 12,499 sqm of office floorspace was transacted, the second lowest annual amount in the 1998-2020 period. In 2020 headline office rents were £20/sqft (£215/sqm), a decline on a 2019 peak of £22/sqft (£236/sqm).
- 8.13 However, while the evens of 2020/21 have retarded the market overall, demand for office space continues and stakeholders were broadly confident the market would recover in time, even if the parameters of what types of space are required, change. Market interest is for smaller suites of sub 500 sqm and particularly sub-350 sqm, to meet micro/small business needs and, also, larger HQ office facilities of up to 2,000 sqm. Demand has included requirements from companies seeking to decrease or increase their business space to meet the demands of social distancing or having a portion of their staff work from home.
- 8.14 Demand is mostly local or sub-regional, with interest focused in Birchwood rather than Warrington Town Centre. Despite this, key local agencies such as Warrington and Co. highlighted a number of opportunities for the delivery of new office space in Warrington Town Centre and were confident that at least some of these could be brought forward in the long term at least, to build up the modest office economy of Central Warrington. Warrington may derive some benefits from Manchester/Liverpool based businesses looking for lower density options, outside of urban areas, for socially distanced working. However, the consensus of stakeholders is that cities will remain attractive places for a majority of businesses to work from.
- 8.15 As of February 2021, there was 70,396 sqm of marketed office floorspace, comprising of 118 properties. The total floorspace being marketed was notably increased on 2019 when there was 49,167 sqm of vacant office floorspace. However, in 2019 there were 164 properties on the market, indicating that the 2021 supply comprises a smaller number of larger units. As was the case in 2019, the available office supply was

focused in Birchwood. Birchwood was also the main source of larger offices, greater than 2,000 sqm in size.

- 8.16 Vacancy rates are noticeably higher in 2021 than in 2019, 13.7 percent by floorspace in 2021 against 9.6 percent in the 2019 EDNA. However, by premises numbers, local office floorspace is better occupied today than it was two years ago – 6.1 percent vacancy in 2021 against 9.5 percent in 2019. Thus, while few companies appear to be seeking new space at the moment, local office businesses are not abandoning the accommodation they already have.

Warrington's Wider Economic Geography and Functional Economic Market Area

- 8.17 The FEMA exercise of 2016 and 2019 has been updated. Based on a mix of market evidence and commuting data, Warrington's Wider Economic Geography includes most of Wigan Borough, and the western portions of Trafford and Salford in Greater Manchester. The northern areas of Cheshire West and Chester and Cheshire East have strong links, as do Halton and St Helens, in the Liverpool City Region. Although geographically more distant, Warrington also has good links with the urban centres of Manchester and Liverpool, and it is felt they also need to be considered as part of Warrington's wider economic geography. The other areas of Greater Manchester and the Liverpool City Region have more limited relationships with Warrington.
- 8.18 In the Cheshire and Warrington sub-region, sites in Birchwood Park form part of the Cheshire Science Corridor Enterprise Zone with Thornton Science Park, sites in 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, Magnitude has some potential to compete with Omega for B2/B8 requirements.
- 8.19 The proximity of Manchester City Centre, the Airport Gateway area and Salford City Centre, will continue to limit demand for offices in Warrington Borough, particularly in the weakened office market of 2020/2021. Growth at Salford Quays will also impact on Warrington's office market, although the sectoral focus of the Quays (media/digital) differs somewhat from Warrington's.
- 8.20 Elsewhere in Greater Manchester, Port Salford is likely to compete with Port Warrington for Canal-linked logistics uses. Growth plans for the Western Gateway area more generally (Salford and Trafford) may increase the draw of labour from

Warrington. 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 15,000 sqm of employment floorspace as part of a mixed use allocation. If delivered, this would meet needs along this corridor which runs close to the boundary with Warrington Borough.

- 8.21 The latest research into the Port of Liverpool predicts increases in all areas of port trade. The 2018 SHELMA suggests that the Liverpool City Region will require 308-397 ha of land for B8 use arising from investment at the Port of Liverpool as well as a more general increase in employment land and housebuilding. In addition, the commodities forecasts presented within the Mersey Ports Masterplan identify a need for around 340 ha of land to 2030. This includes land for Port-related logistics (113 ha) which will overlap with the above demand forecasts for B8 warehouse development.
- 8.22 This need is supply driven and could be accommodated in a wide sub-regional area which extends to include Warrington. While there are several brownfield options which could meet some needs, Parkside, St Helens is the only very large scale strategic B2/B8 site in the pipeline in the Liverpool City Region.
- 8.23 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. In West Runcorn, infill development/redevelopment at Inovyn and on the Ship Canal may prove attractive to high-tech and port linked companies that may otherwise have looked to Warrington, although detailed planning at both locations is ongoing. The redevelopment of Fiddlers Ferry for a new employment scheme, on the edge of Widnes, will deliver benefits to both Halton and Warrington.
- 8.24 In St Helens, development of Parkside would create a Strategic Rail Freight Facility close to Warrington. This will offer some competition with an Omega Extension and any other strategic schemes delivered in Warrington Borough. However, as a rail linked scheme, it would most directly compete with Port Warrington, where a multi-modal rail-linked logistics scheme is also proposed.
- 8.25 The release of 31.22 ha at Omega South Western Extension, Land north of Finches Plantation, Bold, to meet employment land needs arising in Warrington, is now an agreed policy in the emerging St Helens Local Plan. This is discussed further below.

Employment Land Supply

- 8.26 In 2016, Warrington had 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. In the 2019 EDNA Update the realistic supply was 83.91 ha in 17 sites of which 23.94 ha in 13 sites represents the local supply and 71.5 percent, 59.97 ha in four sites, represents the strategic (Omega) supply.
- 8.27 Updating this assessment to 2021, and excluding land now developed, unlikely to be brought forward, completed for alternative uses or held for specific occupiers suggests a supply figure, as of March 2021, of 38.87 ha in nine sites, comprising:
- Strategic (Omega) supply: 12.7 ha (32.7 percent), one site
 - Local Supply: 26.17 ha (67.3 percent), eight sites.
- 8.28 The first point to note is that the 2021 employment land supply is only just over a third of the supply in 2016. Thus, opportunities for business growth, in existing employment sites and areas, are reducing. This reflects the extensive take up at Omega, plus the loss of other land to housing, where supply has reduced from nearly 70 ha in 2016 to 12.7 ha in 2021. Omega North is now full while construction has commenced on the last remaining site at Omega South, Mountpark Phase II, and completion can be expected here by 2022.
- 8.29 Around a quarter of the 2021 Local Supply was found at Appleton Thorn, including one B2/B8 unit now under construction. Appleton was a focus for development activity in 2016 and 2019, highlighting the strength of this local market.
- 8.30 Nearly two thirds of the local supply, and all the strategic supply, is likely to be taken up in a 1-5 year timeframe. Only at Birchwood is a significant portion of available and unconstrained land expected to remain available for more than a decade.

Objectively Assessed Needs

- 8.31 There is no definitive model for forecasting future employment land need. As in 2016 and 2019, two 'Policy Off' based models have been used to assess future employment land provision. These are the projection forward of historic land take up and a forecast based on employment sector change. The employment sector change models are based on forecasts provided by Oxford Economics and Cambridge Econometrics which account for the latest macro-economic issues, such as Brexit, as they were

understood in Feb/March 2021. All assessments of OAN relate to Warrington Borough only.

- 7.94 In terms of a 'Policy On' model, sensitivity testing has been undertaken to understand the forecast growth, above the baseline, outlined in the SEP and the Northern Powerhouse. The projections are only provided as an illustration of the land take requirement of a more optimistic growth trajectory for Cheshire and Warrington. In the case of the SEP, it is noted that post-Brexit and as a result of the Covid-19 pandemic such growth strategies have been down-played and the LEP is now considering Covid-19 recovery plans and seeking to mitigate employment loss. Similarly, the Northern Powerhouse Strategy perspective has largely been abandoned light of Brexit and Covid-19 impacts but is provided as an illustration of the land take estimates from the most optimistic strategy of recent years.
- 8.32 Take-up data was obtained for the 1996-2020 period from the Council. This includes 144.50 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 14.22 ha/year, and a local projection excluding Omega of 8.20 ha/year. The strategic modelling now benefits from seven years of take up evidence at Omega showing the level of completions which can be achieved in Warrington for larger B2/B8 premises, in the contemporary market, when appropriate land is available.
- 8.33 Projected forward over 18 years, 2021-2038, using the above average annual rates, the following need is identified:
- Strategic/Local Take Up Trend: $14.22 \text{ ha/year} \times 18 \text{ (years)} = 255.96 \text{ ha}$
Local Take Up Trend: $8.20 \text{ ha/year} \times 18 \text{ (years)} = 147.60 \text{ ha}$.
- 8.34 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 2038 period. This also makes some allowance for the, likely limited, loss of further employment land to non B-Class uses over the period to 2038. Based on the historic take-up trend this would generate a further land need of 42.66 ha under the strategic/local model, 24.60 ha under the local only model.

8.35 Finally, an analysis of the projected impact of projects and programmes in, and around, Warrington Town Centre, suggests additional land needs of 17.64 ha, to accommodate firms displaced from mostly housing redevelopment sites. Incorporating this requirement increases the needs to:

Strategic/Local Take Up Trend, plus a buffer: 298.62 ha (need) + 17.64 ha
(allowing for displacement) = 316.26 ha (final requirement)

Local Take Up Trend, plus a buffer: 172.20 ha (need) + 17.64 ha
(allowing for displacement) = 189.84 ha (final requirement)

8.36 When measured against realistic supply, Warrington has insufficient land available to meet needs to 2038. To summarise:

Strategic/Local Take Up Trend, plus a buffer: 316.26 ha – 38.87 ha
(realistic supply, strategic and local combined) = **277.39 ha (further need)**

Local Take Up Trend, plus a buffer: 189.84 ha – 26.17 ha
(realistic supply, local only) = **163.67 ha (further need)**

8.37 The updated employment based forecast suggests the following in terms of future employment land provision to 2038 (Table 42).

Table 42 – Employment Based Forecast 2021-2038*

Growth Sectors	Oxford Economics
Total Floorspace, sqm	149,134
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Needed, ha	38.24

Sectors in Decline	Oxford Economics
Total Floorspace, sqm	(98,921)
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Reduction, ha	(25.36)
<i>Net Land Need, ha</i>	<i>12.88</i>

Growth Sectors	Cambridge Econometrics
Total Floorspace, sqm	142,023
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Needed, ha	36.42

Sectors in Decline	Cambridge Econometrics
--------------------	------------------------

Total Floorspace, sqm	(50,290)
Divided by Development Floorspace per ha	3,900
Equivalent Employment Land Reduction, ha	(12.89)
<i>Net Land Need, ha</i>	<i>23.53</i>

Source: BE Group, 2021

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

- 8.38 The forecast considers baseline local jobs only and accordingly are compared against Warrington’s local land supply only. Against that realistic local supply (26.17 ha), and also allowing 17.64 ha for employment land losses in Central Warrington, the Borough continues to have a supply deficit under most scenarios, albeit a far smaller one than under the take-up models.
- 8.39 In terms of sectors relevant to E(g)/B-Class employment land, both forecasts predict the strongest growth to be in the financial and business services sector, with 6,700 or 9,400 jobs forecast to be created before 2038. The forecast also predicts an increase (albeit more modest) in employment in ICT, government services and other services. When these results are aggregated Oxford Economics predict a further 12,300 jobs (14 percent increase) in sectors likely to require E(g)(i) office accommodation whilst Cambridge calculate the equivalent figure at 12,800 (15 percent increase).
- 8.40 The Oxford forecast also predicts growth in construction, accommodation and food services, adding a further 1,900 jobs over the period. The equivalent figure from Cambridge Econometrics is 4,500 jobs.
- 8.41 The forecasts predict modest growth in distribution, of 500 jobs (both forecasts) and this reflects a forecast growth in wholesale and retail in the economy, which will include increasing e-commerce. This would seem a modest rate of growth for the logistics sector, given the extensive development seen at Omega since 2013 and prospects for further major B2/B8 developments in, and around the Borough. However, these forecasts are based on the disaggregation of national trends so will not account for the real market strengths of Warrington.
- 8.42 Manufacturing is predicted to continue its decline in Warrington. Oxford Economics predict a further reduction of 2,100 jobs in the sector and Cambridge Econometrics a more modest decline of 1,100.

- 8.43 Both of the forecasts thus take somewhat differing views about exactly when, and to what extent the economy will recover from the Covid-19 Pandemic, and what sectors will benefit most from future growth. To reflect this uncertainty, it could be advisable to take a midpoint between the two to understand Warrington's Growth perspective. In terms of employment land this would give needs of 18.20-37.33 ha depending on whether the net or growth only figures are used.
- 8.44 The Oxford and Cambridge Forecasts represent two realistic projections for how jobs might change in Warrington to 2037, reflecting factors such as the economic impacts of Covid-19 and the Christmas 2020 Brexit Deal, as they were understood in early 2021. However, to also consider some more optimistic scenarios for jobs growth, this study has also undertaken Sensitivity Testing relating to the SEP and the Northern Powerhouse although, as noted above, these strategies are now of reduced significance or not being progressed at all in the present economic and policy climate.

Sensitivity Testing

- 8.45 The 2017 SEP target is that by 2040 Cheshire and Warrington would become a £50 billion economy generating 120,000 extra jobs. Based on the current split of employment across the sub-region, 26.8 percent of that growth could be in Warrington Borough, a gain of 32,160 jobs to 2040 (or on a straight-line basis 29,363 by 2037).
- 8.46 This 'Policy On' position thus forecasts an additional 19,463 jobs on the baseline forecast position predicted by Oxford Economics and 9,563 on the Cambridge baseline. Of these extra jobs, 13,100 under the Oxford forecast and 8,911 under the Cambridge forecast would be in sectors requiring E(g)/B-Class premises. Using the same methodology as for Baseline Forecasting, this generates additional needs of:
- Oxford Forecast – 181,042 sqm of additional floorspace need, 45.20 ha of additional land need
 - Cambridge Forecast – 175,339 sqm of additional floorspace need, 44.95 ha of additional land need.
- 8.47 In June 2016, the Northern Powerhouse Independent Economic Review (NPIER) was published. Whilst now 5 years old, the NPIER remains recognised as a route map for changing the economic ambition of the North of England, cited in the Warrington Means Business Strategy refresh 2020. It sets out an account of the Northern Powerhouse as a region that could add 850,000 jobs by 2050.

- 8.48 Allocating an appropriate level of this growth to Warrington inevitably requires several assumptions to be made:
- The first assumption is that the 850,000 jobs are secured on a straight-line basis from 2017 to 2050 (33 years) albeit it is likely that economic momentum would increase employment more rapidly at the end of the period. Even apportionment would suggest that 550,000 jobs would be created by 2038.
 - The second assumption is that Warrington secures the same proportion of this employment growth as its current share of employment across the Northern Powerhouse area.
- 8.49 In fact, Warrington represents just two percent of the employment across the Northern Powerhouse region and if the levels of growth predicted in the NPIER were secured and apportioned evenly, Warrington would secure employment growth of 11,000 in the period 2017-2038.
- 8.50 This is only slightly higher than the employment levels forecast by Oxford Economics in the same period (9,900) and lower than that forecast by Cambridge Econometrics (19,800). Thus, undertaking a forecast model from these figures would not generate an output much different from the Baseline Forecasting.

Scenario Testing

- 8.51 However, the employment methods of forecasting, both 'Policy On' and 'Policy Off' still 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, 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 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.
- 8.52 Due to the Covid-19 Pandemic, the focus has been on working from home where possible. This trend is likely to continue to some degree moving forward, meaning some companies will need less space even if they increase their workforces, as most staff will be fully/partly working from home. Conversely, some firms may need more

space, relative to the number they employ, if they wish to continue social distancing practices after 2021.

- 8.53 Given these uncertainties, 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 the period from 1996-2020 and compared to the actual land take-up during that period (Table 43). For this analysis, the Oxford Economics baseline (policy-off) forecast is used.

Table 43 – Employment Land Take-Up/Employment Change Comparison 1996-2020 (Oxford Economics)*

Employment Change	Total Jobs	Land (Ha)
Growth	55,000	149.58
Decline	(6,650)	(79.13)
Net growth / (loss)	48,350	70.5
Historic land take-up	-	341.29 (196.79 less omega)

Source: Oxford Economics, WBC, BE Group, Mickledore 2021

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

- 8.54 Table 43 shows that low net jobs growth over 1996-2020 would have resulted in extremely modest land needs which represent only a fraction of what was taken up. 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 only sectors forecast to grow are considered.
- 8.55 A summary of the take up and Policy On /Policy Off forecast scenarios, for Warrington Borough, is set out in Table 44.

Table 44 – Warrington Borough Land Forecast Models – Summary

Model	Need (A+B+C)			Less Supply (D)	A+B+C-D=Surplus (Shortfall), ha	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Oxford Modelling = Further 45.20 ha of land need	Revised Surplus (Shortfall), ha, accounting for SEP Target based on Cambridge Modelling = Further 44.95 ha of land need.	Assumptions
	A: Land Need 2021-2038, ha	B: Buffer (three years further need) ha	C: Allowance for business displacement associated with Warrington Town Centre Development projects	D: Land Stock 2021, ha – Strategic and/or Local Supply*				
Strategic/ Local Take Up	255.96	42.66	17.64	38.87 Strategic/ local supply	(277.39)	-	-	Based on historic (24 years) take-up of 14.22 ha/pa. Inclusive of seven years take-up at Omega Compares a combined strategic/local growth rate with a strategic/local supply picture SEP figure not applicable to take-up scenarios Of this, strategic need would be approx. 117.94 ha.
Local Take Up	147.60	24.60	17.64	26.17 Local supply	(163.67)	-	-	Based on historic (21 years) take-up of 8.20 ha/pa. Exclusive of take-up at Omega Compares a local growth rate with a local only supply picture SEP figures not applicable to take-up scenarios
Employment based on adjusted stock – Oxford Economics Model	+38.24 Growth +12.88 Change	+6.36 +2.16	17.64	26.17 Local supply	1)(36.07) 2) (6.51)	1) (81.27) 2) (51.71)	-	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	+36.42 Growth +23.53 Change	+6.06 +3.96	17.64	26.17 Local supply	1)(33.95) 2) (18.96)	-	1) (78.90) 2) (63.91)	Based on 1) projected growth sectors 2) projected employment change across sectors A local growth only scenario

Source: BE Group and Mickledore, 2021

*Realistic land supply at March 2021

- 8.56 The variation in the outcome figures demonstrates the uncertainty of forecasting. The outputs, all shortfalls, range from 6.51 ha to 277.39 ha, even ignoring policy on sensitivity testing.
- 8.57 However, from the market assessment and 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 1996-2020 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 and future strategic sites that will draw labour from outside of the Borough.
- 8.58 In conclusion, as in the 2016 and 2019 EDNAs, 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 shortfall in Warrington's employment land supply of employment land, equating to **277.39 ha** to 2038. This is largely unchanged on the OANs put forward in the previous two Studies of 276-277 ha.
- 8.59 Warrington's previous take up can be split by the main employment use classes. Table 45 applies the same proportionate split to the Borough's projected needs against supply, to 2038. It shows the bulk of the need is for B8 land, including strategic requirements, but also with a sizable E(g)(i) office requirement, something not supported by market evidence.

Table 45 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed	
<i>Percentage - Inclusive of Omega</i>	23.4	-	4.9	8.8	56.8	6.1	100.0
Strategic/Local Take Up Trend	74.00	-	15.50**	27.83**	179.64**	19.29	316.26

2021 Realistic Supply, by Use Class*	1.15	-	8.22***	11.76***	17.74	38.87
Further Needs	72.56		34.26	162.18	8.39	277.39

Source: WBC/BE Group, 2021

*Strategic and Local Supply.

**The displaced businesses of Central Warrington, if office tenants are excluded, are almost exclusively industrial. For the purposes of this exercise the need they generate (17.64 ha) is split evenly between E(g)(iii), B2 and B8 storage use

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

Meeting the Needs

8.60 Against identified OAN needs of 277.39 ha to 2038, landowners, developers and their agents made Call for Sites submissions and updated proposals which, as of April 2021, would provide 776.30 ha of potential land. This Study has analysed these sites and graded them A+ to E. Sites graded A+-B- can be said to represent realistic options for employment land supply, measured against market and deliverability criteria. Generally, sites which fall into these gradings have the following features which make them more deliverable than other options:

- Land which is largely/fully under the control of an experienced developer
- An identifiable 'way forward' to development
- Constraints, which while sometimes large, appear surmountable with investment
- A link to identified market demand.

8.61 Ultimately, 496.10 ha of supply is potentially available in the Call for Sites options graded A+ to B-, sufficient to meet projected OAN. This land can be split into seven identifiable supply options for meeting needs, which can then be prioritised in terms of its deliverability (see Table 46).

Table 46 – Land Supply Options

Option No.	Site Name	Size, ha	Comments	Grading
Option One	Land at Bradley Hall Farm, Cliff Road - Six56 (Phase I)	92.00 (gross).	<ul style="list-style-type: none"> Plans for development are well established here. The land is under the control, although not yet ownership, of an experienced developer The scheme has financial backing for both land acquisition and delivery. An Outline Planning Application has been submitted and while there is no guarantee this will be approved; it does show an advanced level of planning for both the scheme and associated infrastructure investment. The absence of significant site constraints mean that this is the only A+ graded land It should also be noted that this employment scheme is not linked to any housing proposals in South East Warrington With Omega now largely full, South East Warrington is where stakeholders expect the new Strategic B2/B8 site for Warrington Borough to be delivered, meeting ongoing strong needs. Its direct motorway access is a key feature, making it more attractive to the market than more isolated sites. 	A+
Option Two	Land around Barleycastle Lane, Barleycastle (Six sites)	44.92 (gross)	<ul style="list-style-type: none"> Land under option to a developer, with a history of delivery Links to a wider identified area of strategic/local market demand and several adjacent established industrial estates which are a focus for recent local growth and home to a range of major local and regional/national firms. Access would be from Barleycastle Road to J20, M6, a route which already accommodates a range of high volume logistics operations, including the new HMRC facility. Sites are large enough to meet a range of local requirements or a small number of strategic operators, reflecting the fact that the wider area meets both local and strategic needs. 	A+/B+, or just B+.
Option Three	Six56 Phase II	70.00 (gross)	<ul style="list-style-type: none"> Land previously proposed for housing, so this analysis assumes it is no longer needed for residential uses Site is largely/fully under developer control and that developer has the backing of an institutional investor to fund the project. Proposals remain indicative however, with no detailed masterplanning on the scale of development can be delivered here, how it will be accessed and what further infrastructure investment will be needed, both on an off-site. Market comments for Six56 Phase I, also apply here The strong B8 market is not identified as a short term trend and with a large, and increasing, portion of commercial activity now undertaken online, strategic requirements are expected to continue after the mid-2020s, and the completion of Phase I. Phase II would provide the opportunity to continue and build upon the momentum and critical mass of development created by Phase I. 	A- (Improved to A+ with more detailed planning)
Option Four	Fiddlers Ferry	101.00 (gross)	<ul style="list-style-type: none"> Masterplan in place for delivery, backed by single site owner. No development partners in place, but good initial interest from industrial/warehouse developers is noted Although not stated by the owner/agents, it is likely that the employment uses will be dependent on the housing to provide an element of cross funding, particularly to support the large site clearance and remediation costs. As the housing is to be developed on Green Belt, releasing the Green Belt land will likely be key to delivery of the brownfield land. The site has good A-Road access but its distance from the M62 makes it less desirable to major logistics occupiers than other locations which enjoy direct motorway access. This weaker position will likely have some impacts on the speed at which B2/B8 options are taken up but and may mean that demand from local firms outweighs demand from strategic businesses. Given the constraints on demand, and the time it could take to fully decommission and clear the power station, it is unlikely the employment site will be fully developed by 2030, as stated in masterplanning. 	A-/B- (A+/B+ - Assuming identified constraints can be addressed)
Option Five	Port Warrington	60.00 – Based on masterplanning	<ul style="list-style-type: none"> Long established strategic proposal, part of the wider Ship Canal growth strategy and building on a modest pre-existing facility. Development will be driven forward by Peel. It would represent a unique facility for Warrington and provide opportunities to bring in port and rail linked operators who would not otherwise consider Warrington as a growth option. However, the scheme is dependent on a great deal of infrastructure investment, as well as overcoming a range of constraints. 	A-/B- (A+/B+ - Assuming identified constraints)

			<ul style="list-style-type: none"> Some concerns have been raised about the capacity of the Western Link Road to support the scheme. This would be particularly true if the scheme became more dependent on road transport over rail/Canal transport. The Council and other bodies would therefore, if progressing this scheme, need to secure agreements that the rail/canal links will in fact be delivered and would take a high proportion of the traffic generated While the developer has the experience and resources to achieve this, development is likely to be a long term process, extending to later in the Local Plan process and likely beyond. The size, shape and distance from the strategic road network may also make it less attractive to some strategic operators and may mean it attracts more local/sub-regional market interest in practice. 	can be addressed)
Option Six	St Modwen – Rixton Scheme	47 ha net – Based on masterplanning	<ul style="list-style-type: none"> The employment land is at a highly accessible location on the A57, with immediate access to J21, M6. Stakeholders are clear that with Omega South nearing capacity there remains a need for a new large strategic B2/B8 site which is directly accessible to the motorways, to meet ongoing demand. Stakeholders broadly assume that a development in South East Warrington Borough will meet this need however, the Birchwood and Woolston Grange areas were also identified as desirable and well established locations for meeting both local and strategic needs. This site links well to these established employment clusters, particularly if a direct link to Birchwood/Birchwood Station can be provided. However, the employment land is split into plots by existing road infrastructure, land ownerships and intervening residential/farm properties, which fall outside of the scheme. This makes delivering a single coherent development more difficult and the adjacent housing will likely put limitations on the scale and location of what can be developed here. Both these limitations mean that many of the plots would better suit local rather than strategic schemes Some, but not yet all, land is under the control of an experienced developer. However, plans remain at a very early stage and key questions remain such as whether the sizable road infrastructure required, can be delivered and what the impacts on the A57 and J21, M6 would be. 	A-/B- (A+/B+ - If key constraints can be addressed, notably bringing in the intervening residential/farm properties which break up the scheme)
Option Seven	Land at Arpley Meadows, Eastford Road - Warrington Commercial Park	33.00 – Current Estimate of Developable Area	<ul style="list-style-type: none"> Falls within wider Warrington Waterfront. The Commercial Park would comprise an industrial estate of more mixed large and small/medium industrial and commercial uses. Although not identified as a strong market priority by stakeholders, compared to motorway linked opportunities, the scheme would serve Warrington Town and would benefit from links to existing and proposed facilities in the Southern Gateway area. It could usefully provide smaller business space to offset the focus on strategic B2/B8 options elsewhere Dependant on the delivery of the Western Link Road, so unlikely to be brought forward till later in the Local Plan Period. Site is physically separate from Port Warrington and appears in a more easily deliverable location. However, it is unclear if any cross funding is required to or from this development to Port Warrington, or other Peel schemes, to ensure its delivery and mitigate constraints. 	B- (B+ - With investment)

Source: BE Group, 2021

- 8.62 To meet any remaining requirement, it is noted that the St Helens Local Plan, currently at EiP Stage, identifies 31.22 ha of land at an Omega South Western Extension, (Land north of Finches Plantation, Bold) specifically to meet employment land needs arising in Warrington. This location is also the subject of an inquiry into an employment development around 40 ha greater than the proposed allocation in the draft St Helens Local Plan. Should this development gain consent then given its location, this additional land could also potentially contribute to meeting needs in Warrington, subject to appropriate agreements between the two Councils.
- 8.63 It would be beneficial for Warrington to continue to support St Helens' proposals to expand Omega, alongside some of the other growth options highlighted in Table 46, for the following reasons:
- Although stakeholders expect the next strategic B2/B8 development in the Borough to be in South East Warrington, Omega has been the focus for strategic development and B2/B8 inward investment, for some eight years now. An enormous critical mass of primarily logistics premises now exists here, equating to 144 ha of employment land, including a range of national and international businesses and specialist sectors such as food production/distribution and auto parts distribution. This is a considerable legacy that any extension can build upon and benefit from the momentum of growth and investment which has continued here since 2013. By comparison, any equivalent development in South East Warrington, Fiddlers Ferry or elsewhere would be 'starting from scratch' in terms of building up critical mass, market interest, etc.
 - It would benefit from a very strong market for B8 logistics premises in the North West, discussed previously
 - Stakeholders note that Omega benefited from direct links both to Warrington town and the other settlements of the M62 Corridor. This provided a sizable catchment from which to draw labour as well as direct access to Greater Manchester and the Liverpool City Region for goods distribution. South East Warrington has good access to the strategic motorway network generally but is more distant from Warrington town and other settlements
 - An Omega extension will benefit from the established infrastructure of Omega South and Junction 8, M62
 - The extension to Omega will fall into St Helens Borough, but all infrastructure and access will come from Warrington Borough to the east. It will also build

upon a Warrington based scheme. Thus, it makes sense to link the extension economically and, in planning terms, to Warrington Borough

- The extension will build upon a pre-existing scheme making it likely it could be delivered more rapidly than other growth options which, as discussed, are completely new developments/redevelopments and require a great deal of advance infrastructure investment. Omega South will be fully developed by 2022 and other schemes are unlikely to deliver any property options before 2024/25 at the earliest. This leaves a gap in which demand is not being met and market interest may move elsewhere in the region. A scheme which could deliver options more rapidly would thus be beneficial.

9.0 RECOMMENDATIONS

9.1 This section sets out the consultants' recommendations arising from the Updated Economic Development Needs Assessment. The recommendations in this report have had full regard to the requirements of the new NPPF and PPGs to encourage and deliver growth through the planning system. It updates and supersedes Warrington's 2016 Economic Development Needs Assessment and 2019 EDNA Update.

Recommendation 1 – Defining the Current Realistic Land Supply

9.2 For this study, the current realistically available land supply in Warrington is defined as nine sites as of March 2021. These comprise a local supply of 26.17 ha in eight sites and a strategic supply of 12.7 ha in one site at Omega as identified in Section 4.0, Table 13. Employment land site proformas for these sites, and others excluded from the realistic supply, are included within Appendix 3.

Recommendation 2 – Defining the Objectively Assessed Need

9.3 The current realistic land supply of 38.87 ha is not sufficient to meet needs over the period 2021-2038, even if a three-year buffer is excluded. Based on the Strategic/Local Take Up rate, including an allowance of 17.64 ha for business displacement associated with Town Centre projects, the shortfall is 277.39 ha, the same as previous requirements of 276-277 ha. Against a Local only take-up model, the shortfall reduces to 163.67 ha.

9.4 The forecasts of industry sector activity (jobs), suggest much more modest land needs.

9.5 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision up to 2038. 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
- Uncertainties about employment densities as company working practices change in light of the Covid-19 Pandemic
- That there will be local market churn

- That there will be a 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 2038
- The level and nature of the existing employment land supply at March 2021.

9.6 **It is therefore recommended (as in the 2016 and 2019 EDNAs) 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 2038. The Strategic/Local Take Up Model best accounts for the full range of need the Borough will face over the next 18 years. This indicates a need of 316.26 ha to 2038, incorporating a three-year buffer and an allowance for the impacts of Town Centre redevelopment. Measured against the Borough’s current realistic supply there is a shortfall of 277.39 ha.**

9.7 Warrington’s previous take up and realistic supply can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 47 applies the same proportionate split to the land supply shortfall, to 2038, and shows that the strongest needs are for B8 warehousing land, followed by E(g)(i) offices, although the latter seems excessive given the modest local office market of the present. The industrial requirement is smaller.

Table 47 – Full Need, Split by Use Class – Strategic/Local

Period	Use Class (Percentage Split, percent)						Total (ha)
	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed	
Further Needs	72.56	-	34.26		162.18	8.39	277.39

Source: WBC/BE Group, 2021

9.8 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, as noted, the local office market is weaker presently than it has been in the past. 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 3 – Areas of Search for New Allocations

9.9 A need of 277.39 ha above current supply levels is identified. A key task for the Local Plan will therefore be to identify further locations for E(g)/B2/B8 provision.

Based on study research, recommended options to meet this need would be:

- **Option One: Land at Bradley Hall Farm, Cliff Road - Six56 (Phase I) – 92.00 ha (gross)**
- **Option Two: Land around Barleycastle Lane, Barleycastle (Six sites) – 44.92 ha (gross)**
- **Option Three: Six56 Phase II – 70.00 ha (gross)**
- **Option Four: Fiddlers Ferry – 101.00 ha (gross)**
- **Option Five: Port Warrington – 60.00 ha (Based on masterplanning)**
- **Option Six: St Modwen – Rixton Scheme – 47 ha (net, based on masterplanning)**
- **Option Seven: Land at Arpley Meadows, Eastford Road - Warrington Commercial Park – 33.00 ha (Current Estimate of Developable Area).**

9.10 The Council will need to take these options into account as part of its wider planning assessment.

9.11 To meet any remaining requirement, it is recommended the Council seek to secure a maximum amount of land from an Omega South Western Extension (Land north of Finches Plantation, Bold), in St Helens Borough. Employment land here could be developed comparatively rapidly, building on the critical mass of Omega South. 31.22 ha is already identified in the emerging St Helens Local Plan, to meet Warrington's needs, with another 30-40 ha of potential employment land in the same area.

Recommendation 4 – Future Reviews

9.12 This report has shown how conditions in Warrington have changed in only the two years since the 2019 EDNA was completed. In addition, this study has suggested a need for further large land allocations to 2038, while take up at Omega is coming to an end. 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 new

NPPF which recommends plan reviews, and by implication reviews of the evidence which supports that plan, every five years.

Recommendation 5 – Maintain Awareness of External Influences

9.13 As a first point, Warrington Borough Council must recognise its role, together with its neighbours, in developing the wider economy of the sub-region. In this respect, they are interconnected, to varying degrees, on several levels.

9.14 Key issues to note include:

- Wigan has growth plans along the A580 East Lancs Road, which will, if delivered, meet needs along this corridor which runs close to the boundary with Warrington Borough
- To avoid overlapping and competition, large scale B-Class development in rural areas of Warrington Borough, north of the M62, is not recommended
- The latest research into the Port of Liverpool predicts increases in all areas of port trade. This will result in a need for almost 397 ha of land for logistics uses in the sub region, with further land needed for commodities logistics. This need is supply driven and could be accommodated in a wide sub-regional area which extends to include Warrington. In principle, the overall brownfield supply of the City Region could meet this need. In practice, however, logistics operators will be looking for very large, serviced sites on the strategic road network. Parkside, St Helens (plus some smaller options around Haydock) is the only large, new site in the Warrington 's Wider Economic Geography which will be able to offer this in the short/mid-term, combined with growth potential at Ma6nitude, Middlewich and potentially 3MG, Widnes.
- Halton and Warrington have a strong interrelationship around Daresbury. The Fiddlers Ferry redevelopment will increase linkages between Warrington and Widnes.
- Manchester (and Salford's) office market will continue to be a major draw for large office occupiers and put a break on the scale of office development which can be realised in Warrington, particularly in the presently weakened regional office market
- Warrington's links with the two Cheshire local authority areas include the shared Enterprise Zone. Both Cheshire West and Warrington have growth plans in the M56 Corridor area which will strengthen these economic links.

9.15 Accordingly, a high level of joint working between these authorities and Warrington Borough Council is advisable and should be continued.

Appendix 1

List of Consultees

Appendix 1 - List of Consultees

B8 Real Estate
CBRE
Cheshire East Council
Cheshire West and Cheshire Council
Colliers International
Cushman and Wakefield
Halton Borough Council
JLL
Liverpool City Council
Liverpool City Region Combined Authority
Manchester City Council
Morgan Williams
Read Property Associates
Salford City Council
Savills
SLR Consulting
St Helens Council
Trafford Council
Warrington & Co.
Warrington Borough Council
Warrington Chamber of Commerce
Wigan Metropolitan Borough Council

Appendix 2

Warrington Vacant Property Schedule

Appendix 2 – Warrington Vacant Property Schedule

Address	Area	Tenure	Price	Size, sqm
Industrial				
Warrington 379 Distribution Centre, Dallam Lane, Dallam, Warrington, Cheshire, WA2 7NT	Town Centre	LH	-	35,205
Warrington 255, Hardwick Grange, Woolston, Warrington, Cheshire, WA1 4RF	Woolston	LH	-	23,742
Barleycastle Trading Estate, Lyncastle Road, Warrington, WA4 4SN	Appleton	LH	Good	22,668
Port Warrington, Birchwood Lane, Moore, Warrington, Cheshire, WA4 6XE	Sankey Bridges	LH	-	21,526
Alpha 167, Warrington Omega, Lingley Mere, Warrington, Cheshire	Great Sankey	LH	-	15,515
Gemini8 Business Park, Charon Way, Warrington, WA5 7XU	Gemini	LH	-	11,085
Distribution Complex, Lyncastle Road, Appleton, Warrington, WA4 4SN	Appleton	FH	-	10,209
21, Kingsland Grange, Warrington, WA1 4RW	Woolston	LH	-	9,764
Omega 88, Junction 8 M62, Warrington, Cheshire, WA5 4DA	Burtonwood	LH	-	8,194
1-4, Raglan Court, Warrington, WA3 6SZ	Birchwood	LH	-	7,593
Howley 80, Howley Lane, Warrington, WA1 2EB	Town Centre	LH	-	7,304
Units 3E and 3F WS Warrington South, Lyncastle Road, Warrington, WA4 4SN	Appleton	LH	-	6,420
Unit 4 Kingsland Grange, Woolston, Warrington, WA1 4RW	Woolston	LH	-	6,089
Stretton Green Distribution Park, Appleton, Warrington, WA4 4TQ	Appleton	LH	-	5,017
Street Record, Bishops Court, Winwick, Warrington, WA2 8QY	Bewsey	LH	-	4,815
Unit 1A, 18 Chesford Grange, Warrington, WA1 4SZ	Woolston	LH	-	4,276
Howley Industrial Park, Howley Lane, Warrington, WA1 2EB	Town Centre	LH	-	4,181
Unit 29, Kingsland Grange, Warrington, Kingsland Grange, Warrington, WA1	Woolston	LH	-	3,365
Thelwall Lane, Warrington, WA4 1PD	Thelwall	LH	Budget	3,089
Unit 4B, Stretton Distribution Centre, Grappenhall Lane, Appleton, Warrington, Cheshire, WA4 4QT	Appleton	LH	Average	2,880

Address	Area	Tenure	Price	Size, sqm
34 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	2,787
Unit 5, Causeway Park, Central Road, Warrington, Cheshire, WA4 6RF	Latchford	LH	Average	2,666
50 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	2,614
Unit One Gemini, Europa Boulevard, Warrington, Cheshire, WA5 7YU	Gemini	LH	-	2,300
Secured Group, Calver Road, Warrington, WA2 8UD	Bewsey	LH	Good	2,294
26/27 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	2,003
2, Heaton Court, Birchwood, Warrington, WA3 6QU	Birchwood	LH	Good	1,454
711 Cavendish Avenue, Birchwood Park, Warrington, WA3 6DE	Birchwood	LH	-	1,340
Unit 2A, Thelwall Lane Industrial Estate, Thelwall Lane, Warrington, WA4 1PD	Thelwall	LH	-	1,265
Unit 11, Chesford Grange, Warrington, WA1 4RQ	Woolston	LH	-	1,212
Industrial Unit, Athertons Quay, Warrington, WA5 1AH	Sankey Bridges	LH	Average	1,059
Unit 23, Grosvenor Grange, Woolston, Warrington, Cheshire, WA1 4SF	Woolston	LH	-	1,031
Unit 7 Bowood Court, Winwick Quay, Warrington, Warrington, Cheshire, WA2 8QZ	Bewsey	LH	Budget	942
Unit 15, Taurus Park, Warrington	Gemini	LH	-	748
Unit C3, Taylor Business Park, Risley, Warrington, Cheshire, WA3 6BL	Culcheth	LH	Good	715
Units 1E 3C & 12, Penketh Business Park, Liverpool Road, Great Sankey, Warrington, Cheshire, WA5 2TJ	Great Sankey	LH	-	708
Wharf Industrial Estate, Wharf Street, Warrington, WA1 2HT	Town Centre	LH	-	558
Unit 3f, Appleton Thorn Trading Estate, Lyncastle Way, Appleton, Warrington, Cheshire, WA4	Appleton	FH/LH	-	557
47 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	486
Trident Business Park, Daten Avenue, Birchwood, Warrington, Cheshire	Birchwood	LH	-	477
Unit 11, Gatewarth Industrial Estate, Barnard Street, Warrington, WA5 1DD	Sankey Bridges	LH	Good	450
Unit 8, Ravenhurst Court, Birchwood, Warrington, Cheshire	Birchwood	LH	-	423

Address	Area	Tenure	Price	Size, sqm
Units 30-33 Prestwood Court, Leacroft Road, Risley, Warrington, WA3 6SB	Birchwood	FH	-	413
Unit 4 Gemini Trade Park, Europa Boulevard, Warrington, Cheshire, WA5 7YF	Gemini	LH	-	369
242, Europa Boulevard, Burtonwood And Westbrook, Warrington, WA5 7TN	Gemini	LH	-	348
17 Rufford Court, Hardwick Grange, Warrington, WA1 4RF	Woolston	LH	-	345
17, Rufford Court, Hardwick Grange, Warrington, WA1 4RF	Woolston	LH	-	345
22 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	301
Clarendon Court, Winwick Quay, Warrington, WA2 8QP	Bewsey	LH	-	298
Unit 253 Europa Trade Park, Europa Boulevard, Warrington, Cheshire, WA5 7TN	Gemini	LH	-	291
Unit D2 Taylor Business Park, Risley, Warrington, WA3 6BL	Culcheth	LH	-	281
21 Melford Court, Hardwick Grange, Warrington, WA1 4RZ	Woolston	LH	-	275
Unit 6, Gateway 49 Trade Park, Kerfoot Street, Warrington, WA2 8NT	Bewsey	FH/LH	-	274
Birch Court, Grosvenor Grange, Warrington, WA1 4GD	Woolston	LH	-	260
Willow Court, West Quay Road, Winwick, Warrington, WA2 8UF	Bewsey	LH	-	248
Unit 5, Gatewarth Industrial Estate, Barnard Street, Warrington, WA5 1DD	Sankey Bridges	LH	Good	221
Unit 3, Cedar Court, Taylor Business Park, Risley, Warrington, Cheshire, WA3 6BH	Culcheth	LH	Good	211
Unit 1, Howley Quay Industrial Estate, Howley Lane, Warrington, Cheshire, WA1 2EL	Town Centre	LH	-	199
Unit 6 Howley Quay Industrial Estate, Howley Lane, Warrington, WA1 2EL	Town Centre	LH	-	199
Clarendon Court, Winwick Quay, Warrington, WA2 8QP	Bewsey	LH	-	186
7 Trinity Court, Risley Industrial Estate, Warrington, WA3 6QT	Birchwood	LH	-	182
15 Trinity Court, Risley Industrial Estate, Warrington, WA3 6QT	Birchwood	LH	-	182
16 Trinity Court, Risley Industrial Estate, Warrington, WA3 6QT	Birchwood	LH	-	182
6 Trinity Court, Risley Industrial Estate, Warrington, WA3 6QT	Birchwood	LH	-	182

Address	Area	Tenure	Price	Size, sqm
30 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
7 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
6 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
21 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
5 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
29 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
28 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
8 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
10 Prestwood Court, Leacroft Road, Birchwood, Warrington, WA3 6SB	Birchwood	LH	-	107
Unit 5 Palatine Industrial Estate, Warrington, WA4 6QQ	Latchford	LH	Good	14
1 Dallam Lane, Warrington	Town Centre	LH	Good	9
Office				
Lingley Mere Business Park, Clearwater, Lingley Green Avenue, Warrington, WA5 3UU	Great Sankey	LH	Good	5,612
Stanford House, Garrett Field, Warrington, WA3 7TH	Birchwood	LH	Good	5,090
Whole Building, 2 Kelvin Close, Birchwood, Warrington, WA3 7PB	Birchwood	LH	Good	4,696
Dominion, Daten Avenue, Temple Court WA3 6GD Warrington	Birchwood	LH	-	3,828
The Point, Birchwood Boulevard, Warrington, WA3 7WD	Birchwood	LH	-	2,853
110, Birchwood Boulevard, Birchwood, Warrington, WA3 7QH	Birchwood	FH	-	2,804
Birchwood Science Park, Rutherford House, Warrington Road, Warrington, WA3 6ZH	Birchwood	LH	-	2,440
Olympic Park, Woolston Grange Avenue, Warrington, WA1 4PX	Birchwood	LH	-	2,302
Longbarn Boulevard, Warrington, WA2 0XD	Birchwood	LH	Good	2,034
Birchwood Park, 106 Dalton Avenue, Birchwood, Warrington, Cheshire, WA3	Birchwood	LH	Good	1,381
Building 310, Europa Boulevard, Westbrook, Warrington, Cheshire	Gemini	LH	Good	1,363
600 Lakeside Drive, Centre Park, Warrington WA1 1RG	Town Centre	LH	-	1,142

Address	Area	Tenure	Price	Size, sqm
Hillcrest, Knutsford Road, Grappenhall And Thelwall, Warrington, WA4 3LA	Grappenhall	FH	-	1,126
Dallam Court, Dallam Lane, Warrington, Cheshire, WA2	Town Centre	LH	-	1,022
3 Clearwater, Lingley Green Avenue, Lingley Mere, Warrington, Cheshire	Great Sankey	LH	Good	1,005
PATRIZIA U, Warrington Road, Warrington, WA3 6AE	Birchwood	LH	Good	990
Chadwick House, Warrington Road, Birchwood Park, Birchwood, Warrington, Cheshire	Birchwood	LH	Average	990
9 Mandarin Point, Centre Park, Warrington, Cheshire	Town Centre	LH/FH	Good	961
330 Firecrest Court, Centre Park, Warrington, Cheshire	Town Centre	LH	Good	957
Whole Building, 3 The Square, Birchwood, Warrington, WA3 7PS	Birchwood	LH	-	932
Street Record, Firecrest Court, Bewsey And Whitecross, Warrington, WA1 1RG	Bewsey	FH	-	932
The Links, Kelvin Close, Warrington, Cheshire	Birchwood	LH/FH	Good	928
The Square, Birchwood Boulevard, Birchwood, Warrington, Cheshire	Birchwood	LH	Good	912
A Concentric, Birchwood Park, WA3 6WX Warrington	Birchwood	LH	Good	871
Whole Building, 4 The Square, Birchwood, Warrington, WA3 7PS	Birchwood	LH	Good	853
6 Olympic Park, Birchwood, Warrington, WA2 0YL	Birchwood	LH	-	836
8 Olympic Park, Birchwood, Warrington, WA2 0YL	Birchwood	LH	-	836
5 Olympic Park, Birchwood, Warrington, WA2 0YL	Birchwood	LH	-	836
9 Olympic Park, Birchwood, Warrington, WA2 0YL	Birchwood	LH	-	836
103 Dalton Avenue, Birchwood Park, Warrington, Cheshire	Birchwood	LH	Good	807
700 Mandarin Court, Warrington, WA1 1GG	Town Centre	LH	Good	776
304 Bridgewater Place, Birchwood Park, Birchwood, Warrington, Cheshire	Birchwood	LH	Good	712
300, Longbarn Boulevard, Warrington, WA2 0XA	Birchwood	LH	Good	680
Fontwell House, Trident Business Park, Birchwood, Warrington, Cheshire	Birchwood	LH/FH	Good	666
401 Faraday Street, Birchwood Park, Birchwood, WA3 7WD	Birchwood	LH	-	613

Address	Area	Tenure	Price	Size, sqm
Brunel House, 340 Firecrest Court, Centre Park, Warrington, Cheshire, WA1 1RG	Town Centre	LH/FH	Good	604
Ground Floor Suite 10 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	530
Tannery Court, Tanners Lane, Warrington, Cheshire, WA2	Town Centre	LH	-	511
Office 13, 3-5 Wilson Patten Street, Warrington, Cheshire, WA1 1PG	Town Centre	LH	Average	498
1, Kelvin Close, Warrington, WA3 7PB	Birchwood	LH	-	474
Executive Suite 15 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Good	471
Cygnat Court, 210 Centre Park, Warrington, Cheshire, WA1	Town Centre	LH	-	465
The Quadrant, Dewar Street, Warrington, WA3 6FW	Birchwood	LH	Average	395
Unit 11A, Olympic Way, Poulton-With-Fearnhead, Warrington, WA2 0YL	Birchwood	LH	Good	380
Unit 12b, Olympic Park, Olympic Way, Warrington, Cheshire	Birchwood	LH	Good	373
PATRIZIA U, Warrington Road, Warrington, WA3 6AE	Birchwood	LH	Average	358
520 Birchwood Boulevard, Birchwood, Warrington, Cheshire	Birchwood	LH	Average	330
101 Dalton Avenue, Birchwood Park, Warrington, Cheshire	Birchwood	LH	Good	329
Ground Floor Suite 16 & 16a St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	326
First Floor Suite 19 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	317
Birchwood One Business Park, Unit 602, Dewhurst Road, Birchwood, Warrington, Cheshire	Birchwood	LH	Good	310
The Outset, Sankey Street, Warrington	Town Centre	LH	Average	308
Quay Business Centre, Harvard Court, Winwick Quay, Warrington, Cheshire	Bewsey	LH	Good	301
Unit A - Ground Floor, The Beacons, Warrington Road, Birchwood, WA3 6GP	Birchwood	LH	Good	293

Address	Area	Tenure	Price	Size, sqm
Birchwood Park, Lovell House, 412, The Quadrant, Warrington, WA3 6FW	Birchwood	LH	Good	268
104, Dalton Avenue, Warrington, WA3 6YE	Birchwood	LH	Good	260
First & Second Floor Suites, Jubilee Way, Warrington, Cheshire, WA2 8HE	Orford	LH	Average	252
The Maltings, 100 Wilderspool Causeway, Warrington, Cheshire, WA4 6PU	Town Centre	LH	-	251
Ground Floor Suite 1 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	223
Webster Court, Unit 3, Carina Park, Warrington, Cheshire	Gemini	LH	Good	209
Birchwood Boulevard Business Park, Birchwood Boulevard, Birchwood, Warrington, Cheshire	Birchwood	LH	Good	203
Rixton Old Hall, Manchester Road (A57), Warrington, WA3 6EW	Woolston	LH	-	194
Greenway House, Greenway, Paddington, Warrington	Woolston	LH	Good	192
Patrizia U, Warrington Road, Warrington, WA3 6AE	Birchwood	LH	Good	190
13 Palmyra Square South, Warrington, Cheshire, WA1 1BL	Town Centre	LH	Average	188
1-2 Whitefield Court, Taylor Business Park, Croft, Warrington, WA3 6BL	Culcheth	LH	-	188
First Floor Suite 10b & 10c St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	188
203 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	181
27 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	180
Unit 18 Rowan House, Green Lane, Padgate, Warrington, Cheshire, WA1 4JN	Padgate	LH	Average	177
109 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	174
634, Birchwood Boulevard, Warrington, WA3 7QU	Birchwood	LH	-	158
The Brew House, Wilderspool Business Park, Greenalls Avenue, Warrington, Cheshire	Stockton Heath	LH	Good	141

Address	Area	Tenure	Price	Size, sqm
The Base, Dallam Lane, Warrington, WA2 7NG	Town Centre	LH	Good	140
IBIS House, IBIS Court, Centre Park, Warrington, WA1 1RL	Town Centre	LH	-	134
First Floor Suite 15 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	133
129 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	128
First Floor Suite 12 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	128
First Floor Units 1 & 2 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	128
204 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	113
First Floor Office Suite, Fernden House, Chapel Lane, Stockton Heath, Warrington, WA4 6LL	Stockton Heath	LH	Average	111
Causeway Bridges Farm, Old Alder Lane, Burtonwood, Warrington, Cheshire	Burtonwood	LH	Average	97
130 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	94
Gnd Flr, 82 Buttermarket Street, Warrington WA1 2NN	Town Centre	LH	-	93
Unit 8 Greenwood Court, Taylor Business Park, Culcheth, Warrington, WA3 6BH	Culcheth	LH	-	92
First Floor Suite 20 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	89
Birchwood Boulevard Business Park, Birchwood Boulevard, Birchwood, Warrington, Cheshire	Birchwood	LH	Good	79
Jamie House, Knutsford Road, Latchford, Warrington, Cheshire, WA4 1JE	Latchford	LH	Budget	78
Patten House, Moulders Lane, Warrington, WA1 2BA	Town Centre	LH	-	74
Unit 1 Greenwood Court, Taylor Business Park, Culcheth, Warrington, WA3 6BH	Culcheth	LH	-	69

Address	Area	Tenure	Price	Size, sqm
First Floor Suite 24 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	66
110 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	64
Cinnamon House, Cinnamon Park, Crab Lane, Fearnhead, Warrington, Cheshire, WA2 0XP	Birchwood	LH	-	62
139 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	61
The Boultings, Winwick Street, Warrington, Cheshire, WA2	Town Centre	LH	-	57
First Floor Suite 21 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	56
Padgate Business Park, Suite 6, Green Lane, Padgate, Warrington, Cheshire, WA1 4JN	Padgate	LH	Average	56
141-142 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	54
Padgate Business Park, Suite 4, Green Lane, Padgate, Warrington, Cheshire, WA1 4JN	Padgate	LH	Average	54
135 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	53
131-132 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	53
1 Springfield Street, Warrington, Cheshire, WA1 1BB	Town Centre	LH	Average	52
133 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	51
39 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	51
Ribban Court, 20 Dallam Lane, Warrington, Cheshire, WA2	Town Centre	LH	-	46
140 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	46
Church Road, Lymm, Warrington, Cheshire, WA13 0QG	Lymm	LH	Good	44
Arpley House, 59 Wilson Patten Street, Warrington, WA1 1NF	Town Centre	LH	Good	28

Address	Area	Tenure	Price	Size, sqm
Ragan House, 674 Knutsford Road, Warrington, WA4 2NS	Latchford	LH	Good	23
First Floor Empire Court, 30 Museum Street, Warrington, Cheshire, WA1 1LE	Town Centre	LH	Average	22
Newton House, Warrington Road, Birchwood Park, Birchwood, Warrington, Cheshire	Birchwood	LH	Average	18
143 London Road, Stockton Heath, WA4 6LG	Stockton Heath	LH	-	16
Office 6, 3-5 Wilson Patten Street, Warrington, Cheshire, WA1 1PG	Town Centre	LH	Average	15
Executive Suite 11 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Good	15
Suite 16, Padgate Business Park, Green Lane, Warrington, Cheshire, WA1 4JN	Padgate	LH	Average	13
St Barnabas House, off St Barnabas Place, Warrington, WA5 1PG	Bewsey	LH	Good	9
C Concentric, Birchwood Park, WA3 6WX Warrington	Birchwood	LH	Average	Not known
Portal Business Centre, Dallam Court, Dallam Lane, Warrington, WA2 7LT	Town Centre	LH/FH	-	Not known
111 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	Not known
36-37 The Genesis Centre, Garrett Field, Birchwood, Warrington WA3 7BH	Birchwood	LH	-	Not known
Ground Floor Suite 15 St James Business Centre, Wilderspool Causeway, Warrington, Cheshire, WA4 6PS	Town Centre	LH	Average	Not known

Source: Radius Data Exchange/Agent Websites, 2021

Appendix 3

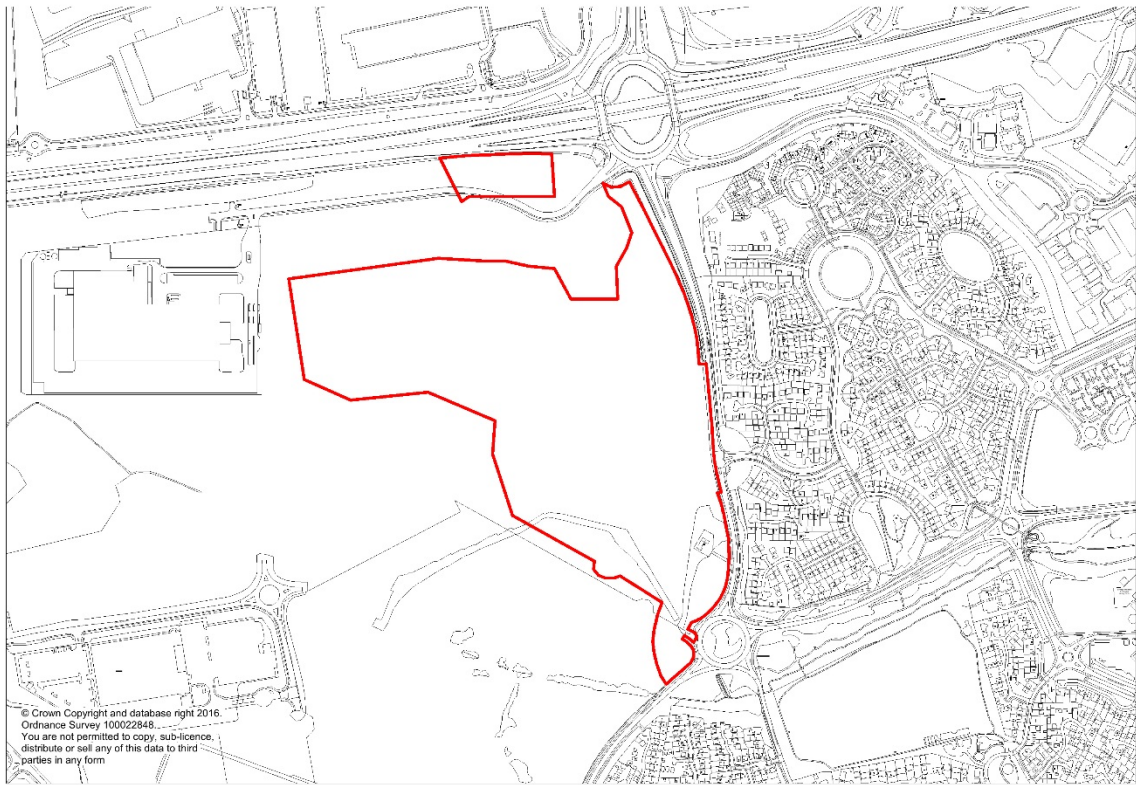
Employment Site Proformas

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.

Strategic Sites – Omega	
Site Ref: Name	Omega Phases 1 and 2 Remainder
Owner	Homes England. Mountpark Logistics EU Sarl is developer.
Agent(s)	Marketing agents: <ul style="list-style-type: none"> • CBRE • JLL.
Size, ha	12.70
Market Availability	On the market as Mountpark Warrington Omega II. Units 2 and 3 are on the market, to let: <ul style="list-style-type: none"> • Unit 2: 18,876 sqm • Unit 3: 20, 932sqm. Unit 1, 28,596 sqm, let to Gousto.
Planning	<p>Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) 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> <p>2017/30371 - Outline consent for manufacturing (B2) and distribution/logistics (B8) (in a 30 per cent B2 to 70 per cent B8 ratio) and Office (B1a) floorspace.</p> <p>2019/35646 – Reserved matters planning consent for three B2/B8 units on 12.7 ha in the north of the site, totalling 68,404 sqm. This represents the remaining area of undeveloped, consented employment land in Omega South.</p> <p>Land to the south, now re-named phase 4-7 Omega South, is now consented for mixed use development including 617 homes (2019/36241).</p>
Proposal	Meal box delivery company Gousto have agreed a lease for Unit 1 (28,596 sqm). Construction has started on Unit's 1 and 2 and is expected to complete by the end of 2021. Unit 3 was identified as a second phase, but construction has also started on this unit, so completion is likely within a year.
Constraints	None
Comments	-
Likely Development Potential	12.7 ha – B2/B8
Serviced	No – Servicing under development
Availability, years	1-5

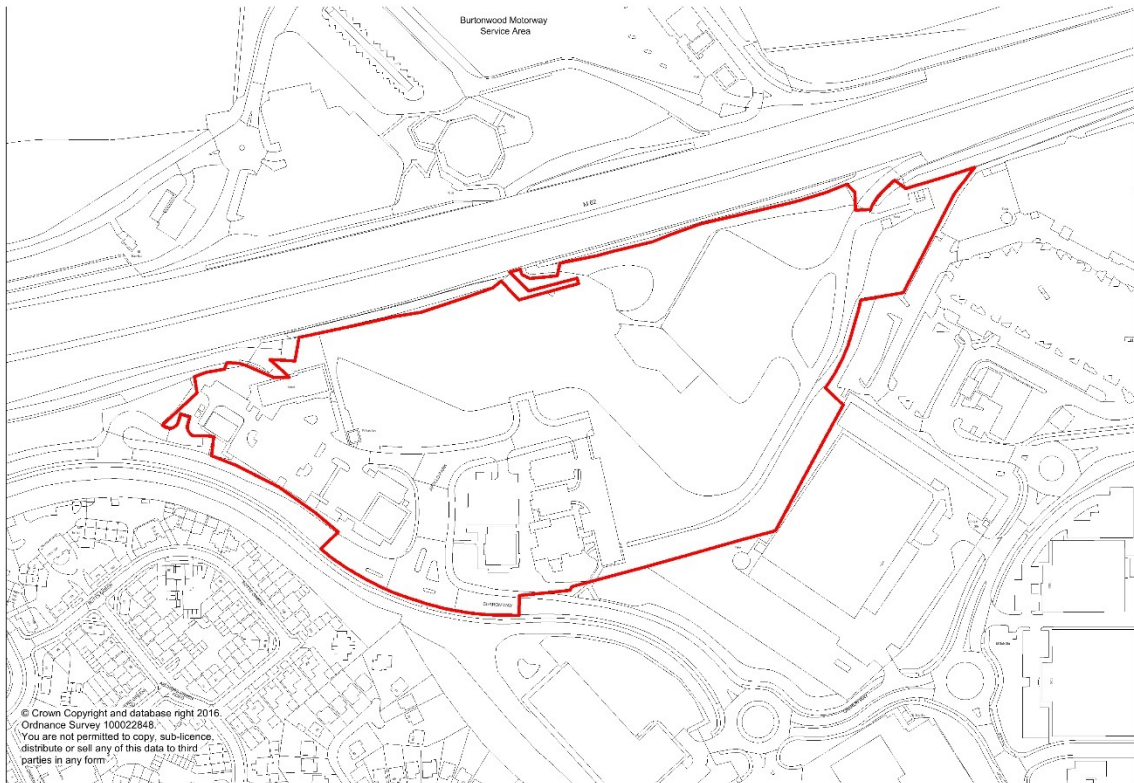
Site: Omega Phases 1 and 2 Remainder



Local Employment Sites

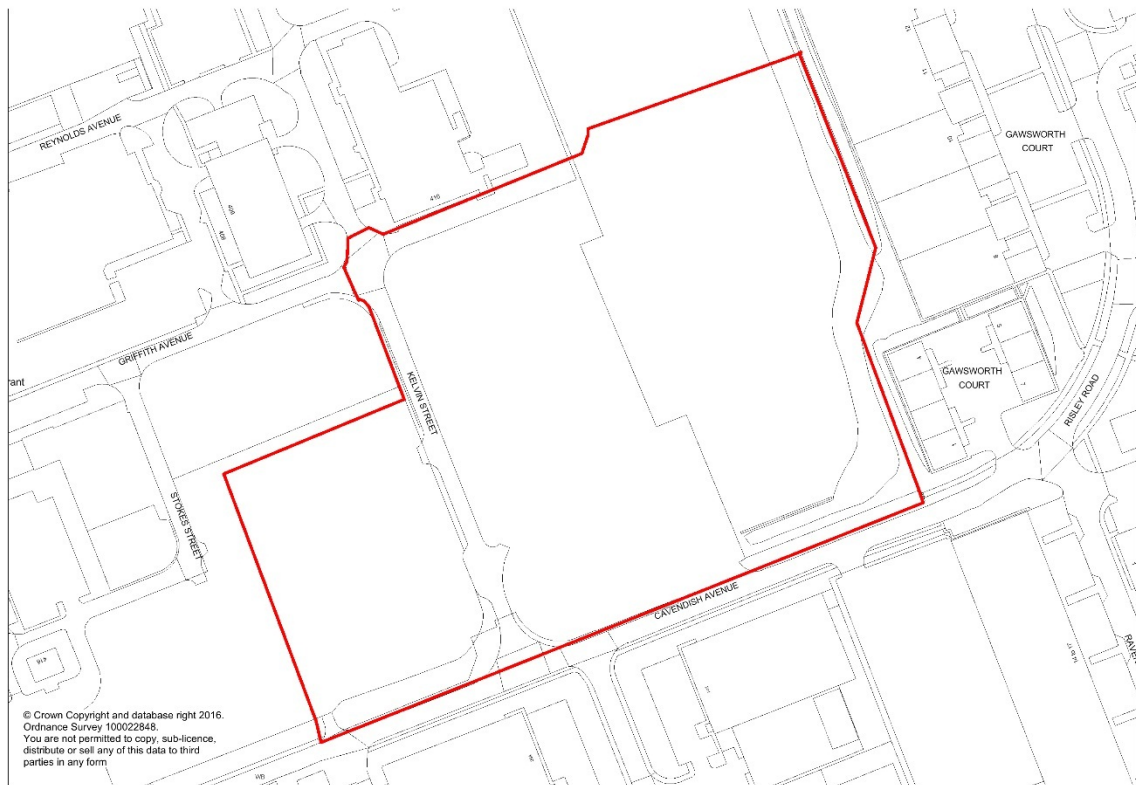
Site Ref: Name	356: Gemini 8 Retail Park, Charon Way, Westbrook
Owner	Chancerygate, Hines
Agent(s)	Marketing agents for industrial scheme: <ul style="list-style-type: none"> • CBRE • Davies Harrison.
Size, ha	4.34
Market Availability	Scheme of 18 industrial units being marketed, to let, off plan
Planning	<p>Within existing Employment Area (Policy PV1) 2007/11923 (Outline) and 2012/19514 (reserved Matters) - 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.</p> <p>2018/32405–Full consent for a new health and leisure facility of some 3,300 sqm granted and since developed.</p> <p>2018/33471 - Full Planning (Major) granted - Proposed construction of two storey car sales building with workshop, construction of single story wash and valet building along with external vehicle display and customer parking. Construction yet to commence.</p> <p>2020/37225 – Granted full planning permission Oct 2020 for 18 units for use Class B1c (E(g)(iii)), B2 or B8.</p>
Proposal	<p>Original proposal comprised the following:</p> <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’ – all now built. • 2.03ha – B1(a) office (10,917 sqm gross floor area) – Not developed. • 3.18ha – B1(c)/B2/B8 industrial (12,450 sqm gross floor area) – Superseded by the below. <p>Athelis Leisure Centre developed 2018/2019 with the loss of 0.87ha of land with remaining land available for B Class uses.</p> <p>Active proposal is for 18 E(g)(iii), B2 or B8 units with a gross external area of 11,110 sqm. Individual units will be 361-1,556 sqm in size, in two main terraces, taking up 2.07 ha. Scheme is being marketed and expected to start in the second half of 2021, with completion by the end of the year.</p>
Constraints	-
Comments	-
Likely Development Potential	2.07 ha – E(g)(iii)/B2/B8. Assuming success of the scheme, other remaining land likely to be developed for similar.
Serviced	Partly
Availability, years	1-5

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



Site Ref: Name	367: The Quadrant (South), Birchwood Park
Owner	Warrington Borough Council
Agent(s)	Patrizia
Size, ha	3.64 (of which 1.87 ha remains undeveloped)
Market Availability	Land not available. Completed properties now 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 (1,623sqm) and 713 (2,008 sqm) are completed and let. Under revised plot numbering these comprise plots 718 and 719 Thus, four units totalling 7,296 sqm remain to be delivered on approx. 1.87 ha of land (Plots 714-716). This is now referred to as the Quadrant Phase III.
Constraints	-
Comments	Patrizia report interest from industrial end users for the remaining sites in the Quadrant. It may also build out a further phase of 2,000 sqm units. Delivery of the outstanding space therefore likely in the next few years. Falls within the Cheshire Science Corridor Enterprise Zone.
Likely Development Potential	1.87 – B2
Serviced	Yes
Availability, years	1-5

Site 367: The Quadrant (South), Birchwood Park



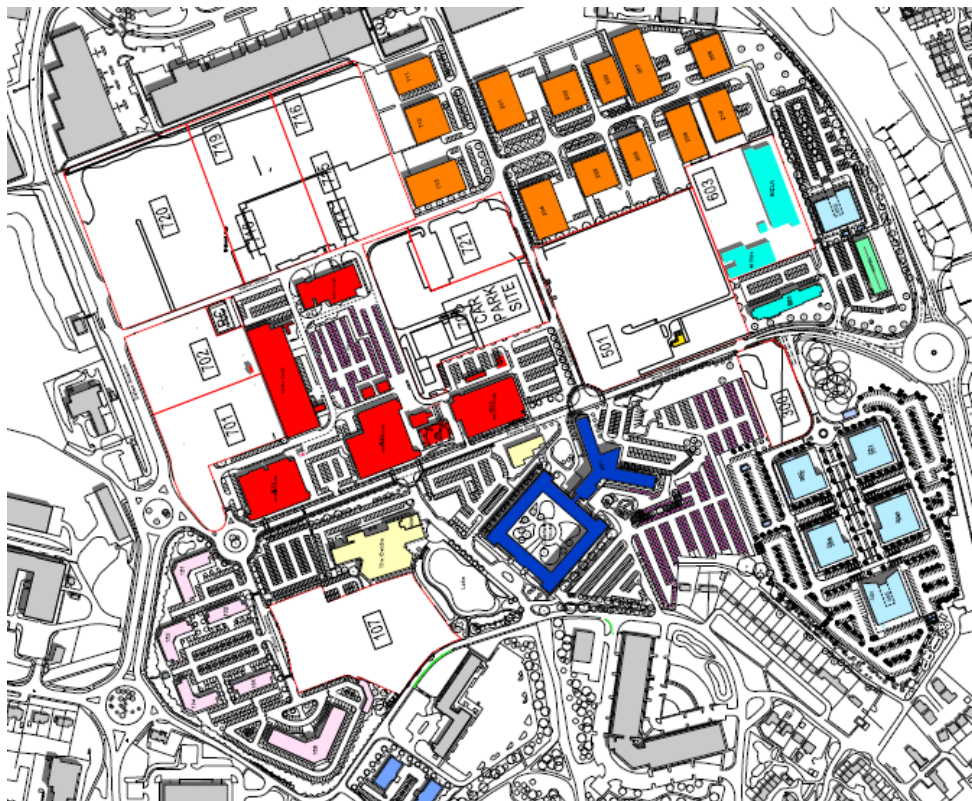
Site Ref: Name	381(a): Quadrant Phase 2, Birchwood Park
Owner	Warrington Borough Council
Agent(s)	B8
Size, ha	6.41 – All now developed
Market Availability	Not available
Planning	Within existing Employment Area (Policy PV1) 2015/26044 – Outline consent for the demolition of some existing buildings and erection of offices, light and general industrial and warehousing development (use classes B1, B2 and B8) and ancillary uses (A1/A2/D1/D2). Several subsequent Reserved Matters applications
Proposal	Proposed for five B2/B8 units with a GIA of 17,387 sqm, split: <ul style="list-style-type: none"> • 717 – 1,941 sqm • 718 – 1,941 sqm • 719 – 2,471 sqm • 720 – 5,923 sqm • 721 – 5,109 sqm. Site complete as of March 2021 and all occupied. Rents of £7.50/sqft (£81/sqm) were achieved.
Constraints	-
Comments	-
Likely Development Potential	6.41 – B2/B8
Serviced	Yes
Availability, years	N/A - Developed

Site 381(a): Quadrant Phase 2, Birchwood Park



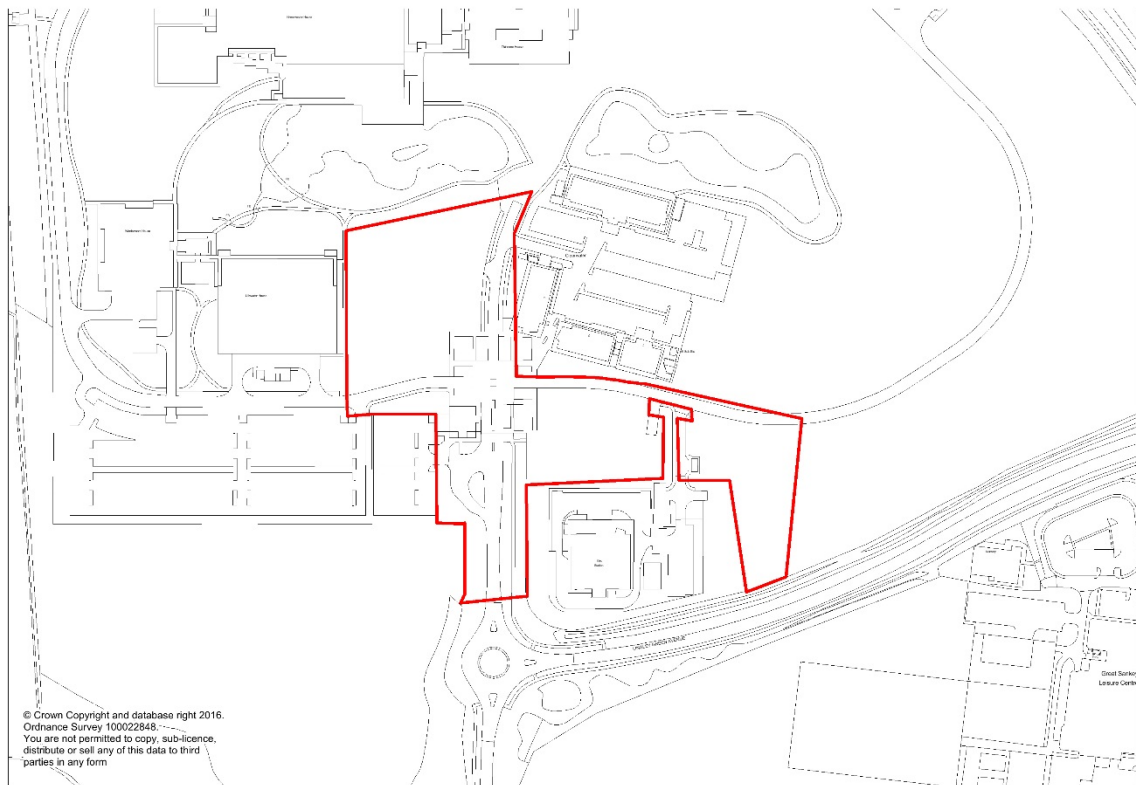
Site Ref: Name	381(b): Multiple Plots Birchwood Park
Owner	Warrington Borough Council
Agent(s)	BE Group, B8, Jones Lang LaSalle
Size, ha	8.71 still realistically developable
Market Availability	Available
Planning	Within existing Employment Area (Policy PV1) 2015/26044 – Outline consent for the demolition of some existing buildings and erection of offices, light and general industrial and warehousing development (use classes B1 (E(g), B2 and B8) and ancillary uses (A1/A2/D1/D2).
Proposal	Proposed for up to 50,464 sqm of E(g) 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 assumed the demolition of three existing buildings totalling 7,642 sqm. Proposal extended 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 (now 603) –Accommodates car parking/business space for Jacobs, no plans for change. • Quadrant: B2/B8 - discussed separately as site 381(a): Quadrant Phase 2, Birchwood Park.
Constraints	Trees onsite Foundations of cleared buildings onsite
Comments	Reflecting analysis in the 2019 and 2021 EDNA Studies, the outstanding land supply is: <ul style="list-style-type: none"> • 107 (1.04 ha): On market for design and build development, likely B2/B8 use • 300 (306) (0.50 ha): Proposed for office uses. • 501-502 – Now just referred to as 501 (2.76 ha): Proposed for office uses. Established interest from a local company. • 701-702– Now just referred to as 722 (4.41 ha): Proposed for industrial uses. <p>All the plots 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.</p>
Likely Development Potential	Current likely split: <ul style="list-style-type: none"> • E(g) (i) – 3.26 ha • B2/B8 – 5.45 ha
Serviced	Yes
Availability, years	10+

Site 381(b): Multiple Plots Birchwood Park



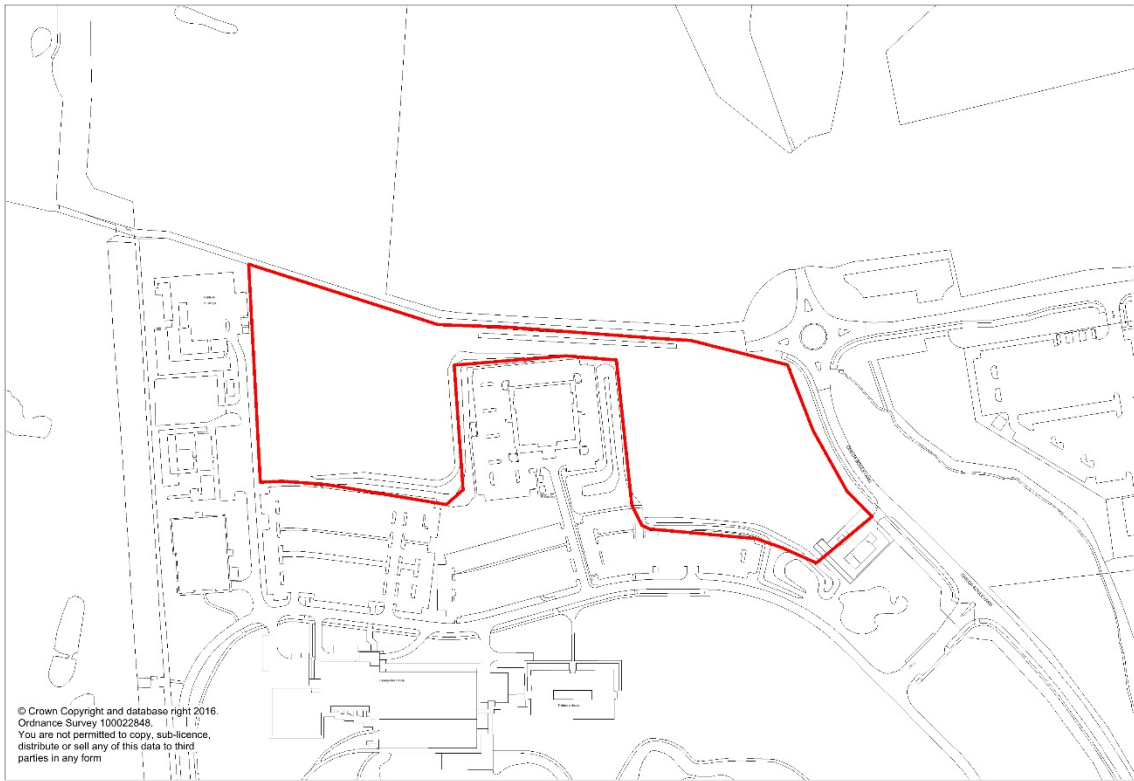
Site Ref: Name	357: Phase 1 Remainder - Lingley Mere
Owner	United Utilities. Muse Developments are developers
Agent(s)	Edwards and Co.
Size, ha	1.15
Market Availability	Available – No strong interest at present
Planning	<p>Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) Within existing 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 2018/32061- Eastern part of site (circa 0.8 ha) lost to residential development (208 dwellings) 2020/36310 - Central part of the site (0.4 ha) lost to Little Acorns Nursery</p>
Proposal	<p>Original proposal was for 8,808 sqm of offices of 1,858-4,459 sqm. However, with a large proportion of the land lost to housing, and a nursery, the remainder comprises a single plot east of the Ullswater Building. No identified plans for development here, land remains available for development.</p>
Constraints	-
Comments	-
Likely Development Potential	B1(a) office
Serviced	Yes
Availability, years	6-10

Site 357: Phase 1 Remainder - Lingley Mere



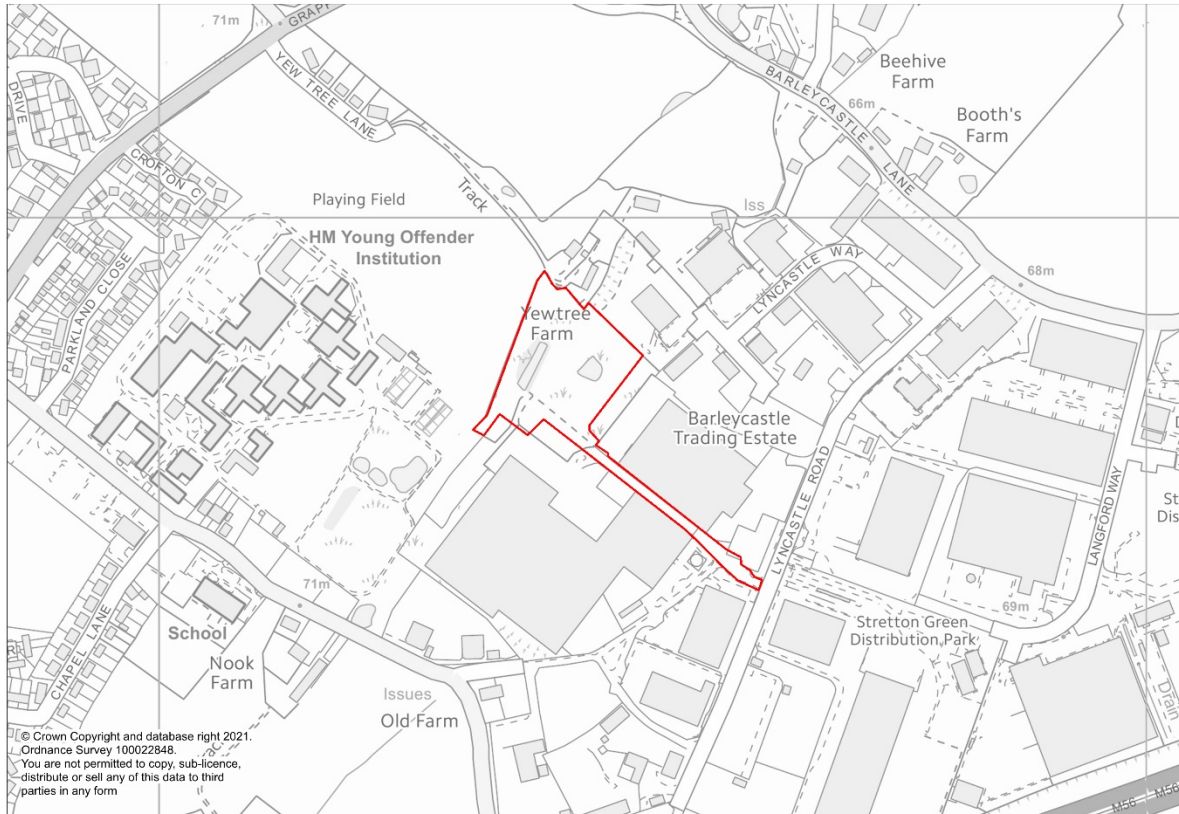
Site Ref: Name	15 A(c): Phase 3 - Lingley Mere
Owner	United Utilities. Canmoor Developments are developers
Agent(s)	Edwards and Co.
Size, ha	3.62
Market Availability	Not available
Planning	<p>Within Strategic Proposal Area of Omega and Lingley Mere (Policy CS8) Within existing Employment Area (Policy 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, to 2028. The below application is intended to replace this. 2020/38264 – Awaiting decision for Full Planning (Major) for the proposed demolition of existing buildings and erection of a building for flexible employment purposes within Use Classes E (light industry), B2 (general industry) and B8 (storage and distribution) with ancillary offices, car parking, landscaping and service yard areas, and associated works.</p>
Proposal	<p>Site was purchased by Canmoor in 2019/20 for £1.85 million/hectare (£750,000/acre). Consent is being sought for a single new build employment unit comprising 15,604 sqm (GIA) of flexible E(g) (iii)/B2/B8 employment space. This is understood to be a speculative proposal, for a larger B2/B8 unit comparable to those developed at Omega to the north</p>
Constraints	Trees onsite
Comments	<p>Most of the frontage of this site now comprises car parking. Proposal involves the clearance of several prefabricated offices north of the Stepping Stones Nursery. United Utilities submitted the eastern portion of this site, east of the Grasmere building, (1.80 ha) to the 2017 Warrington Call for Sites exercise, for housing use. No commitments have been made on this in the Local Plan process, but a residential use seems likely given that all land to the immediate east has now been developed for housing.</p>
Likely Development Potential	<p>Indicative split based on the current consent:</p> <ul style="list-style-type: none"> • B1(a) – 0.29 ha • B2 – 0.36 ha • B8 – 2.97 ha
Serviced	Part
Availability, years	1-5

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



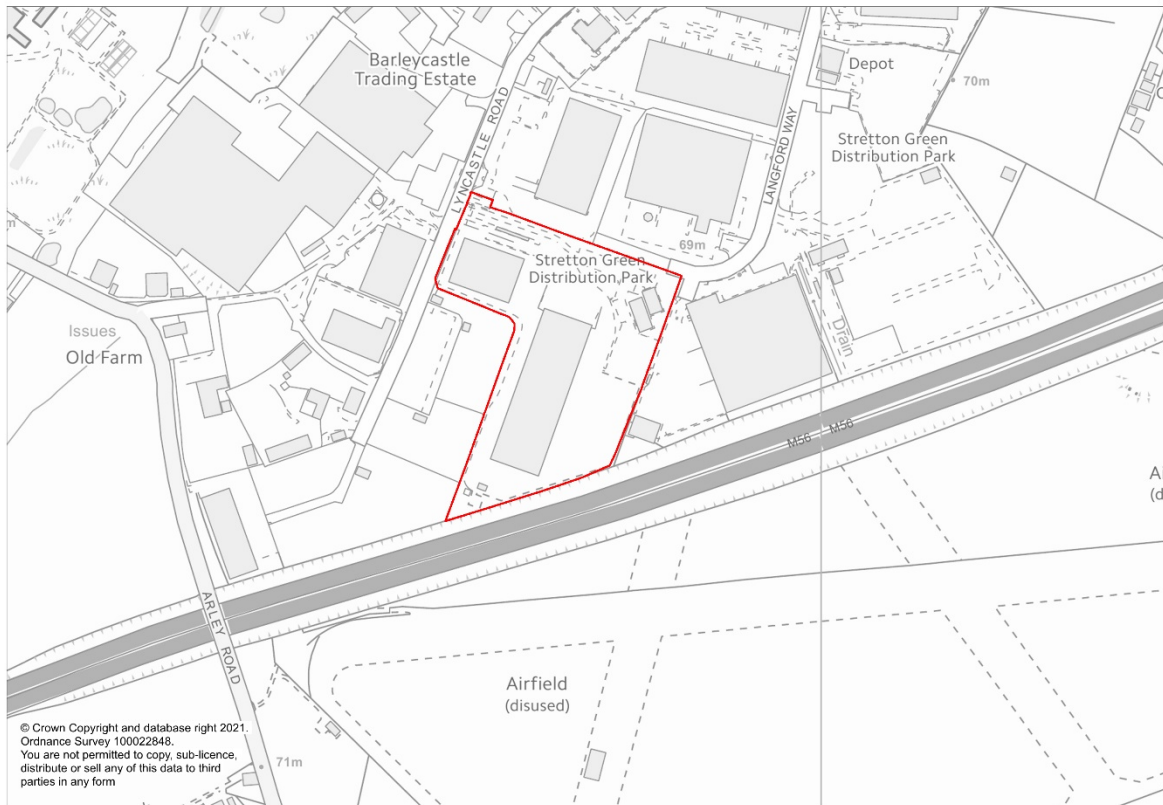
Site Ref: Name	Unit 4 Appleton Thorn Trading Est, Lyncastle Road
Owner	Wardell Warehousing Services Ltd
Agent(s)	Marketing agents for industrial scheme: <ul style="list-style-type: none"> • B8RE • Savills
Size, ha	1.79
Market Availability	Unit to be developed is on the market, to let, as WS50.
Planning	Within an existing Employment Area (Policy PV1) 2019/35280 - Erection of a warehouse (Use Class B8) with ancillary office space (Use Class B1a), creation of access, service yard, parking, earth remodelling to the existing bund, boundary treatment, and landscaping.
Proposal	The warehouse unit will comprise 4,688 sqm of floorspace (gross internal area): <ul style="list-style-type: none"> • Warehouse: 4,350 sqm • Office: 309 sqm • Reception: 28 sqm Speculative development. Construction has commenced with completion expected by spring 2021.
Constraints	-
Comments	Agents report several enquiries for the property, all from B8 businesses. No deal completed yet, but it is not anticipated there will be a problem letting the property on completion. Quoting rent was £7.50/sqft (£81/sqm) and has since been increased to £8.00/sqft (£86/sqm).
Likely Development Potential	1.79 – B2/B8
Serviced	Yes
Availability, years	0-1

Site Unit 4 Appleton Thorn Trading Est, Lyncastle Road



Site Ref: Name	Travis Perkins Barleycastle Trading Estate
Owner	British Airways Pensions Trustees
Agent(s)	Site marketing agents: <ul style="list-style-type: none"> • B8 • Avison Young
Size, ha	4.69
Market Availability	Site for sale, with consent
Planning	Within an existing Employment Area (Policy PV1) 2020/37595 - Full Planning (Major) granted - Proposed demolition of existing buildings, construction of Employment Development for B8 Use with integrated office accommodation, parking, gatehouse & warehouse operations office with landscaping and associated works.
Proposal	The site has full planning permission for a flexible consent for use between Classes B1(c) (E(g) (iii)), B2 and B8 employment, of up to 23,235 sqm GEA and associated infrastructure.
Constraints	Pre-existing buildings to be cleared
Comments	Site is on the market, with its existing buildings of 10,209 sqm. Implementation of the consent will therefore depend on the new owner.
Likely Development Potential	4.69 – B2/B8
Serviced	Yes
Availability, years	1-5

Site Travis Perkins Barleycastle Trading Estate



Appendix 4

Site 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	<p>Proximity to key local routes (A49, A50, A57, A56):</p> <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	<p>May be physical (including access), planning, or legal</p> <p>Reduce score by 2 for each constraint</p> <p>If there are none – score 10</p>

	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, 2021

Appendix 5

Site Scoring Results

Appendix 5 - Site 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					
Omega Phases 1 & 2 Remainder	12.70	10	6	10	5	10	7	10	10	10	6	84	46	Industrial	None
The Quadrant (South), Birchwood Park	1.87	7	6	4	10	10	10	10	10	5	6	78	32	Industrial	None
Phase 1 Remainder - Lingley Mere	1.15	6	10	4	5	8	10	10	10	3	3	69	33	Office	None
Gemini 8 Retail Park, Charon Way, Westbrook	4.34	9	6	3	5	10	7	10	8	5	6	69	31	Industrial	None
Multiple Plots Birchwood Park (381b)	8.71	7	6	4	10	6	10	6	10	7	0	66	34	Industrial	Trees onsite Foundations of cleared buildings onsite
Phase 3 - Lingley Mere	3.64	7	10	2	5	8	7	8	8	5	6	66	32	Industrial	Trees onsite
Travis Perkins Barleycastle Trading Estate	4.69	4	6	10	0	10	10	8	6	5	6	65	31	Industrial	Pre-existing buildings to be cleared
Unit 4 Appleton Thorn Trading Est, Lyncastle Road	1.79	4	6	2	0	10	10	10	6	3	10	61	21	Industrial	None
Quadrant phase 2 (381a) Birchwood Park	0.00	7	6	4	10	10	10	10	10	0	0	67	27	Industrial - All developed	None

Source: BE Group, 2021

Appendix 6

Cambridge Forecast Assumptions *Included Separately*

Appendix 7

Oxford Forecast Assumptions

Appendix 7 – Oxford Economics Forecast Assumptions

Provided by Oxford Economics March 2021

A7.1 Our new forecast assumes that children begin to return to school from 8 March. With the government set to adopt a more cautious approach to re-opening than last year, we assume other sectors will follow through April and into May, provided that case numbers and hospitalisations continue to fall and there are no problems with the vaccination roll-out. The lifting of restrictions on social consumption, and associated boost to confidence, should trigger a strong consumer-led recovery, with GDP growing by more than 8% q/q in Q2. And the carry-over from the stronger-than expected end to 2020 underpins our forecast of 5.5% for 2021.

A7.2 The other key factors influencing the outlook are:

- *Continued fiscal support:* factoring in the grants made available to firms hit by the third lockdown, we estimate the government has provided around £285bn (14% of GDP) of fiscal support for fiscal year 2020/21. While almost all of the stimulus is temporary in nature, November's Spending Review saw the government loosen policy by £40bn (2% of GDP) in 2021/22, making the withdrawal of fiscal support less dramatic. And given the tightening of restrictions in recent months, we assume the government continues to add further short-term support.
- *Sustained monetary policy support:* the BoE is in the early stages of conducting the £150bn worth of asset purchases authorised at its November 2020 meeting. These are due to run to December 2021 and the MPC has suggested it will offer further support if necessary. Additional support could come in the form of negative interest rates, which will be part of the MPC's toolkit from August. But we think the policy is unlikely to be used given the economy should be in the midst of a strong rebound at that point.
- *Low inflation:* CPI inflation is set to average 0.5% in Q1 and, while strong base effects will push up headline inflation rates from the spring, we expect only a brief period of above-target inflation in late-2021/early-2022. Low inflation will support household spending power.
- *Further modest rise in unemployment:* there has been only a modest deterioration in key labour market indicators so far. Unemployment was 5% in the three months to November, up only 1ppt on pre-pandemic levels despite GDP being 7.4% lower. That said, we suspect official data understates the scale of the fall in employment, given problems in accurately measuring the scale of outward migration during the pandemic. The resilience of the labour market largely reflects the success of the Coronavirus Job Retention Scheme, which has paid the bulk of the wages of

furloughed workers. Our forecast assumes the government will keep the scheme in place until Covid-related restrictions have been lifted. This should cap the peak in unemployment at around 6% on the ILO measure in mid-2021.

- *Extra trade frictions due to Brexit:* the UK-EU free trade agreement will keep UK-EU trade tariff- and quota free for qualifying goods. But the new relationship has still introduced new customs and regulatory trade barriers that will weigh on export competitiveness.

A7.3 Two factors will weigh on UK long-term growth prospects: Brexit and scarring from the pandemic. Though the UK and EU struck a basic free trade agreement, the switch from EU membership to the new relationship introduces significant new frictions on UK-EU trade. This will result in some degree of trade destruction, limiting improvements in total factor productivity, and will reduce the attractiveness of the UK as a destination for FDI. Scarring from the pandemic will exert a further drag, with long-term unemployment set to rise and low levels of business investment reducing the degree of capital deepening. But while the UK is likely to grow at a slower pace than over the past decade, we still expect it to outperform many western European economies due to:

- *Continued growth in labour supply:* immigration levels will be much lower than in the past two decades but working-age population will still expand through natural increases and further rises in the state pension age.
- *Leading position in several service sectors:* the UK economy is a global leader in the provision of several areas of financial and business services.