



Employment Land Study

Vale of Glamorgan Council

Final Report

March 2023

BP12

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EXECUTIVE SUMMARY

Introduction

- i. This report provides an Employment Land Study to support the Vale of Glamorgan (the Vale) Replacement Local Development Plan (2021-2036) (RLDP). It has been carried out on behalf of the Vale of Glamorgan Council (the Council).
- ii. It updates previous employment land evidence produced for the adopted Vale of Glamorgan Local Development Plan (2011-2026) (LDP), particularly the Vale of Glamorgan Employment Land and Premises Study, completed by BE Group, for the Council, in 2013.

Methodology

- iii. Research methods used include e-meeting and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with a range of major private sector employers and public sector agencies. Desktop analysis of national, sub-regional and local reports and strategies has also been undertaken.
- iv. The suitability, deliverability and viability of sites for B-Class use development have been reviewed. This land supply has been assessed against forecasts of land need – based on past take up of land and forecast employment growth. This is then developed into a series of economic development recommendations that cover not just land, but also premises.

Findings

- v. According to ONS Population Estimates, the Vale of Glamorgan had a total of 135,295 residents in 2020. The Vale had the sixth largest population in the Cardiff Capital Region and accounted for 4.3 percent of the Welsh total. The proportion of the population of working age, 16-64 years old, in the Vale of Glamorgan was 60.3 percent, below the average in the Cardiff Capital Region as well as the Welsh national average (62.0 percent and 61.2 percent respectively)
- vi. Of the 79 Lower Layer Super Output Areas (LSOAs) of the Vale of Glamorgan, three were ranked in the top ten percent most deprived in Wales. This equates to 3.8 percent of the Vale of Glamorgan's LSOAs being in the most deprived ten percent of

the country. Conversely, 49 (or 62.0 percent) of the LSOAs in the Vale of Glamorgan were in the top 50 percent least deprived LSOAs in Wales and over a quarter of the LSOAs (22) are found in the top ten percent least deprived in Wales. Thus, overall, the Vale has a low level of deprivation.

- vii. Manufacturing was the second largest industry in the Vale of Glamorgan, after the Health Sector, employing 3,500 or 8.5 percent of the workforce in 2020. However, proportionately the role of Manufacturing seems weaker within the Vale of Glamorgan as proportions of 9.9 percent and 10.5 percent were observed across the Cardiff Capital Region and Wales respectively. The sector also lost 1,000 jobs between 2015-2020, a sizable 22.2 percent reduction on the 2015 workforce. This is in line with trends elsewhere in England and Wales, where the size of the Manufacturing sector has generally been shrinking.
- viii. There were also a respectable 2,250 employed in Transportation and 2,500 employed in Construction locally, proportionately above wider averages, particularly for Transportation. These sectors also gained 120 and 50 new businesses respectively, and 250 jobs each, over 2015-2020, evidence of a healthy and growing local industrial sector.
- ix. Private office sectors accounted for a combined total of 15.4 percent, or 6,300 employees in the Vale, compared with 16.8 percent for Wales. Welsh averages will be skewed by Cardiff however, a long-established centre for the office economy.
- x. From 2015-2020, the total number of jobs within the Vale of Glamorgan has stayed constant at approximately 41,000. The growth which did occur, however, was focused in private office sectors. The Professional, scientific and technical sector saw the greatest increase in jobs over the period observed as 1,250 jobs were added, a 71.4 percent increase. The next largest increase in jobs was seen in the Business administration and support services sector where the workforce grew by 750 or 50.0 percent. This growth, combined with a small gain of 100 workers in the ICT sector, contributed to an overall strong growth in office-based sector employment of 48 percent.
- xi. The office-based sectors saw a combined net increase of 135 businesses, with the largest growth occurring in the ICT and Business administration sectors, increasing by 55 and 50 businesses respectively. This combined with a growth in jobs of 2,050 over the same period indicates that the office-based sectors have performed strongly

in the Vale of Glamorgan at least pre the Covid-19 Pandemic.

- xii. In respect of the Industrial Market in the Vale of Glamorgan, 145 industrial deals have been recorded over the past ten years with a total of 83,950 sqm of floorspace transacted. Properties of 501-1,000 sqm were most frequently transacted, accounting for 29.0 percent of the total during the timeframe. In 2021, despite the ongoing Covid-19 Pandemic the amount of industrial/warehouse floorspace transacted surged to levels not seen since 2016/2017. 2021 saw good market activity both for smaller 101-200 sqm units and mid-sized floorspace of 1,001-5,000 sqm, with deals focused in Llandough Trading Estate and at Atlantic Trading Estate, Barry.
- xiii. Most vacant property was 201-1,000 sqm in size. This is not in line with the transactions detailed above as the most transacted industrial units were 1,001-5,000 sqm in size. Interestingly, despite the fact that industrial units 0-100 sqm in size accounted for 27.6 percent of all transactions over the past decade, there was not a single unit available on the market at the observed moment in time, suggesting an area of shortage in supply against demand.
- xiv. In respect of the Office Market in the Vale of Glamorgan office units of a small size are most popular, with units under 100 sqm accounting for nearly two thirds of all transactions. Since 2018 only 15 office transactions have occurred in the Vale of Glamorgan. Local office market performance was not noticeably worse in 2020 and 2021, than was the case in 2019. Thus, the Covid-19 Pandemic, and associated Lockdowns did not significantly impact on the local office market rather, with only a couple of exceptional years, it has always been modest in the Vale.
- xv. Offices to let dominated the market in the Vale of Glamorgan with 13 of the 14 offices being available on this basis. This would suggest that there is a shortage of freehold office options in the Vale of Glamorgan. There were more units of 101-200 sqm available than any other size band (42.8 percent). No units were being marketed larger than 1,000 sqm as of July 2022.
- xvi. Stakeholders identify three distinct spatial markets:
- *Barry* – Home to a strong industrial economy with strong demand for premises 150-2,000 sqm. Barry's distance from the M4 inhibits its ability to compete for larger inward investment requirements, however, it is well placed

to pick up some of the unmet requirements from Cardiff, which has a shortage of standard industrial land and premises.

- *Cardiff Airport and Enterprise Zone* – A high-quality, mixed use business park, something the Vale has lacked and a highly competitive asset within the Welsh economy.
- *Rural Vale* – Strong but localised market either servicing the market towns of Llantwit and Cowbridge or small local businesses operating as part of the wider regional supply chain. Demand is mostly industrial, but Cowbridge is emerging as a popular location for small office suites for local businesses. Vale Business Park meets a lot of needs, but existing farm diversification schemes have performed well and opportunities for similar farm diversification could be encouraged (subject to transport impacts on local areas).

xvii. A review of the Cardiff Capital Region Market Area suggests sectoral strengths in neighbouring Boroughs which will impact on the economy of the Vale and provide competition in certain areas:

- Bridgend – High Tech. The loss of the Ford plant, and Honda at Swindon, will also impact the Tier 2-4 automotive parts suppliers of the Capital Region
- Cardiff – Strategic offices
- Monmouthshire/Newport – Logistics enjoying stronger strategic road access
- Newport – High Tech/Services and Chemicals
- Torfaen/Cardiff – Life Sciences.

Employment Land Supply and Need

xviii. In terms of land supply, an analysis of the 11 sites allocated for future employment development concluded that 177.54 ha net (205.91 ha gross) of employment land was realistically available and deliverable in the Borough as of summer 2022 (see Section 6.0 of the Main Report for the full analysis). The supply of LDP allocated land, comprising 139.14 ha net (167.51 ha gross) of strategic employment land and 38.40 ha (net and gross) of local employment land will meet overall needs to 2036 under all the scenarios put forward in this study.

xix. To assess need, three recognised methods of forecasting have been used, reflecting Welsh Practice Guidance:

- Practice Guidance Method One: Past Building Completions – Two scenarios were created using different aspects of the identified available take-up data for the period 1996-2021:
 - Scenario One: Local/Strategic Take Up – 3.39 ha/year average annual take up
 - Scenario Two: Local only Take Up – 1.88 ha/year average annual take up.
 - Practice Guidance Method Two A: Labour Demand Forecasting – jobs growth, as identified in Oxford Economics (2022) forecast modelling, consistent with jobs densities and plot ratios defined in Welsh Practice Guidance.
 - Practice Guidance Method Two B: Resident Workforce (Demand from New Labour) – the additional employment land need from nine population scenarios.
- xx. The outputs from the first two models are outlined in Table ES1. The figures allow for a minimum five-year flexibility buffer to allow for choice and potential change in needs during the RLDP period as well as providing some accounting for further possible losses in the supply.
- xxi. The outstanding supply of employment land, allocated in the LDP, meets the baseline objectively assessed need (OAN) under these forecast models.
- xxii. The jobs based forecast model suggests the Vale of Glamorgan has a land need of - 53.00 ha to 2036 using the 'Net Change' scenario and 33.86 ha using the 'Growth Only' scenario. However, BE Group does not recommend use of the economic forecasts as the basis for defining employment land need. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors.
- xxiii. Thus, evidence favours Scenario One: Local/Strategic Take Up as it best accounts for the full range of need the Vale will face over the next 15 years. This indicates a need of 67.80 ha to 2036, incorporating a five-year buffer. Measured against the Vale's current realistic supply there is a surplus of land to meet needs.
- xxiv. The 139.14 ha net (167.51 ha gross) of available strategic employment land does exceed projected needs overall. However, looking beyond the baseline requirement it is important to highlight that the three big strategic sites will meet differing market needs, at differing times during the RLDP period, delivering economic gains beyond simply meeting the Vale's baseline employment land requirements.

Table ES1 – Land Forecast Models – Summary

Model	Scenario	A: Land Need 2021-2036, ha	B: Flexibility Buffer (five years take-up rate) ha	C: Land Need Incl. flexibility buffer	D: Land Stock 2022, ha (net)	E: Surplus (or Shortfall), ha	Assumptions
Comments on the Table	<i>The models and scenarios for projecting land needs in the Vale, over 2021, as set out in Section 7.0</i>	<i>Baseline Land Need over 2021-2036 (15 years), in hectares derived from the models, as set out in Section 7.0</i>	<i>A Buffer of an additional five years take up to provide businesses with a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period.</i>	<i>A+B=C, the total land need to 2036 comprising the baseline need and five year buffer</i>	<i>The stock of land, both local and strategic employment land available to meet the identified needs, as defined in Paras 6.9-6.11 and Table 17, Pages 95-107, Section 6.0</i>	<i>D-C=E, the surplus or shortfall in employment land which remains once the total need (C) is deducted from the available supply (D)</i>	
Practice Guidance Method One: Past Building Completions	Scenario One: Local/Strategic Take Up	50.85	16.95	67.80	177.54 – Local/Strategic	109.74	Based on historic (25 years) take-up on the local and strategic employment sites and areas of the Vale, equating to 3.39 ha/year
	Scenario Two: Local only Take Up	28.20	9.40	37.60	38.40 – Local Only	0.80	Based on historic (25 years) take-up on only the local employment sites and areas of the Vale, equating to 1.88 ha/year
Practice Guidance Method Two: Labour Demand Forecasting	-	<i>Net Change</i> B1: 2.37 B2/B8: -17.76 Total: -15.39 <i>Growth Only</i> B1: 2.79 B2/B8: 0.62 Total: 3.41	<i>Net Change</i> B1: 0.79 B2/B8: N/A Total: 0.79 <i>Growth Only</i> B1: 0.93 B2/B8: 0.20 Total: 1.13	<i>Net Change</i> B1: 3.16 B2/B8: -17.76 Total: -14.60 <i>Growth Only</i> B1: 3.72 B2/B8: 0.82 Total: 4.54	38.40 – Local Only	<i>Net Change</i> 53.00 <i>Growth Only</i> 33.86	Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors

Source: Vale of Glamorgan CBC/BE Group, 2022

xxv. In terms of the Resident Workforce Model (Demand from New Labour, Method Two B), the additional employment land need from ten population scenarios indicate that the Vale will see the following jobs change:

- WG-2014: -1,890
- WG-2018: 3,645
- WG-2018-HIGHPOP: 4,380
- WG-2018-LOWPOP: 2,865
- PG-5Y: 6,390
- PG-Long Term: 3,150
- PG-10Y: 2,955
- Dwelling-led 5Y: 7,395
- Dwelling-led 10Y: 4,875
- Employment-led OE: 375.

xxvi. Method Two B converts these additional/reduced jobs, into an additional land requirement:

- WG-2014: -5.16 ha
- WG-2018: 9.96 ha
- WG-2018-HIGHPOP: 11.97 ha
- WG-2018-LOWPOP: 7.82 ha
- PG-5Y: 17.45 ha
- PG-Long Term: 8.60 ha
- PG-10Y: 8.07 ha
- Dwelling-led 5Y: 20.20 ha
- Dwelling-led 10Y: 13.32 ha
- Employment-led OE: 1.03 ha.

xxvii. It is important to note that these represent the employment land requirement specifically from these population/jobs growth scenarios and are not a forecast of OAN for the whole Vale economy.

Recommendations

xxviii. This report has had full regard to the requirements of Future Wales, TAN 23 and Planning Policy Wales to encourage and deliver growth through the planning system. The key recommendation is:

That the Council should use Practice Guidance Method One: Past Building Completions as the main method of assessing needs, specifically, Scenario One: Local/Strategic Take Up. This suggests that the Vale's employment land requirements are 67.80 ha to 2036 (inclusive of a five-year buffer).

xxix. Other recommendations are that:

- To meet this need, the Policy MG9 Employment Sites totalling 177.54 ha should be protected for B-Class uses in the RLDP (see Table 32 of the Main Report, pages 146-148)
- Ensure flexibility in the B-Class uses allowed at Bro Tathan, and on other employment sites to be allocated in the RLDP to ensure the land retains the flexibility to meet changing market requirements over the period to 2036
- 22 Employment Areas have been reviewed and should be protected for B-Class uses in the RLDP (see Table 33 of the Main Report, pages 149-150)
- Within the Major Employment Sites, non B-Class employment uses should not normally be permitted, unless a clear viability case can be made.
- For the Secondary/Key Local/Neighbourhood Employment Sites, a more flexible approach could be taken to help facilitate a broad range of economic development. In some cases, a more intensive mixed-use development could provide greater benefit to the local community than if the site was retained solely in employment use. Subordinate complementary or supporting uses could be permitted where a vitality and viability case can be made.
- Employment development outside the identified Employment Areas contributes to local employment activity and jobs. Any consideration of future non-employment changes of use, in such locations, should be addressed in the same way as land in Secondary-Neighbourhood Employment Sites
- The Aberthaw Power Station Site should be protected as a Regeneration Site in the RLDP, for the mix of uses which is ultimately agreed in masterplanning
- A rural diversification policy is recommended in the RLDP which indicates support for B1/B2/B8 developments which are appropriate to their location
- The Council should continue to review its employment land portfolio as part of plan review stages, approx. every 4 years, or where there are significant local changes identified as part of Plan monitoring.

1.0 INTRODUCTION

1.1 This report provides an Employment Land Study to support the Vale of Glamorgan (the Vale) Replacement Local Development Plan (2021-2036) (RLDP). It has been carried out on behalf of Vale of Glamorgan Council (the Council).

1.2 It updates previous employment land evidence produced for the adopted Vale of Glamorgan Local Development Plan (2011-2026) (LDP), particularly the Vale of Glamorgan Employment Land and Premises Study, completed by BE Group, for the Council, in 2013.

1.3 This new Employment Land Study will consider contemporary macro-economic issues such as the Covid-19 Pandemic and Brexit and their impact on the local economy. It will specifically meet the scope and requirements set out in the Study Brief, to:

- *“Undertake a property market assessment, identifying where demand and opportunities exist for employment related development, where existing employment land is no longer in demand, and establish property market profiles for offices, industry and warehousing. This should include engagement with property agents, landlords, landowners, occupiers/businesses, and relevant public bodies.*
- *Provide a review of Welsh Government, regional and local policies of relevance to the demand and need for employment land in Vale of Glamorgan over the Plan period 2021-2036.*
- *Provide an assessment of the socio-economic characteristics of the Vale of Glamorgan, with a particular focus on the characteristics of the local workforce*
- *Undertake qualitative appraisals of both existing LDP employment land allocations and existing employment sites to identify a qualitative hierarchy of sites and premises. The appraisal of existing LDP sites should include an assessment of their potential and likelihood for employment uses.*
- *Identify a hierarchy of employment sites within the Vale of Glamorgan, that reflect their role and function.*
- *Identify the level of any intervention (policy or other) required to deliver and/or improve lower quality sites and where appropriate alternative uses (i.e. non-industrial/ commercial) forms of development.*

- *Calculate future land requirements based on a range of scenarios which should be undertaken in accordance with the Development Plans Manual (Edition 3) March 2020. Also include forecasts based upon past take up of employment land, market, and labour demand forecasting over the plan period 2021-2036. Forecasting should also take account of the long-term changes to work patterns and employment land and premises needs arising from the Covid 19 pandemic.*
- *Consider the interaction of job creation and housing provision on employment land over the plan period. This should be based on a sound methodology that considers demographic changes over the plan period as well as other influencing factors such as travel to work patterns.*
- *Provide policy options and recommendations, including relevant employment indicators for the monitoring framework.*
- *Provide a final report which clearly sets out the methodology and approach taken. The report should include a qualitative assessment of the scale, location, accessibility, marketability, and competitiveness of existing employment sites in the Vale of Glamorgan, and objectively assess employment land requirements for the authority over the plan period including an allowance for flexibility and to enable range and choice. The study must be capable of withstanding scrutiny through an Inquiry or Public Examination as part of the RLDP process, as well as scrutiny via the Development Management process.”*

1.4 BE Group, economic development and property consultants, compiled this report during March-July 2022, supported by Per Consulting providing advice on the local property market. It reflects Welsh Government guidance contained within ‘*Future Wales: The National Plan 2040*’ (2021), ‘*Building an Economic Development Evidence Base to Support a Local Development Plan*’ (2015), ‘*Technical Advice Note 23: Economic Development (2014)*’ and the ‘*Development Plans Manual (Edition 3) (2020)*’.

Methodology

1.5 Research methods used include e-meeting and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with a range of major private sector employers and public sector agencies. Desktop analysis of national, sub-regional and local reports and strategies

has also been undertaken.

- 1.6 The suitability, deliverability and viability of sites for B-Class use development have been reviewed. This land supply has been assessed against forecasts of land need – based on past take up of land and forecast employment growth. This is then developed into a series of economic development recommendations that cover not just land, but also premises.
- 1.7 Appendix 1 contains a list of all consultees.

Welsh Employment Land Review Guidance

- 1.8 This study reflects Welsh Government guidance on how Local Authorities should approach employment land reviews, namely '*Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan*' and Section 5.0 of '*Development Plans Manual (Edition 3) (2020)*'.
- 1.9 The employment land review process takes the form of a four-stage methodology under the following headings:
- **Stage 1: Property Market Assessment** – An analysis of demand in terms of specific market sectors, property requirements and geographical areas, focusing on the current situation and prospects for the RLDP over its life cycle.
 - **Stage 2: Audit of Employment Sites** – The quantitative inventory and qualitative appraisal of local land supplies, including existing committed, allocated and potential employment sites and existing stock, considering site conditions, infrastructure, deliverability/viability, competing locations and market demand. This will feed directly into the review's conclusions on whether any further land should be identified for employment and whether any existing or committed employment sites should be transferred to other uses.
 - **Stage 3: Future Land Requirements** – Establishing the RLDP's employment land requirement using recognised forecast methods, primarily:
 - *“Method 1 – Past Building Completions. Method 1 uses the average annual completions rate for B1, B2, and B8 employment land for a previous period in order to project future requirements over the life of the RLDP.*
 - *Method 2 – Labour Demand Forecasting. Method 2 involves acquiring*

employment growth forecast data for relevant Standard Industrial Classification activity sectors, assigning sectors to B-use classes and then converting jobs to floorspace.”

- Need for a buffer to act as a flexibility allowance
- Links to Population and Household Growth, considering:
 - Working age profile
 - Economically active
 - Migration rates
 - Commuting patterns and rates
 - Level of self- employment and home based working, plus potential trends
 - Age profile.
- **Stage 4: Policy Options and Recommendations** – Identifying policy options and recommendations, based on review findings.

1.10 Table 1 shows how the Employment Land Study aligns with this Guidance. The link between the report and the Planning Practice methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – Practice Guidance

Stage 1: Property Market Assessment	
Step 1: Identify where demand and opportunities exist for development. Step 2: Identify where existing employment land is no longer in demand. Step 3: Establish property market profiles for offices, industry and warehousing.	Covered in Sections: 3.0 Socio-Economic Profile 4.0 Property Market Assessment 5.0 Stakeholder Consultations <i>Demand assessment and market profiling, including consultations with local businesses regarding their land/property needs.</i>
Stage 2: Audit of Employment Sites	
Step 1: Preparation of a quantitative site inventory Step 2: Preparation of qualitative site appraisals Step 3: Recommendations	6.0 Employment Land Assessment <i>Quantitative and qualitative site assessments</i>
Stage 3: Calculating Future Land Requirements	
Method 1 – Past Building Method 2 – Labour Demand Forecasting	7.0 Future Land Requirements Review <i>Review of completed Economic Development Evidence Base, allowing for updated LDP position.</i>
Stage 4: Assessment Review	

Step 1: Policy Options Step 2: Policy Recommendations Step 3: Monitoring and Recording	8.0 Conclusions 9.0 Recommendations <i>Final reporting, including conclusions and policy/practice recommendations.</i>
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Source: BE Group, 2022

2.0 STRATEGIC CONTEXT

Introduction

- 2.1 This section focuses on Welsh Government, sub regional and local reports and strategies that have a relevance to the allocation of employment land and premises. An understanding of the strategies and reports contained in this study is needed to show strategic alignment and a holistic approach to promote sustainable development. The recommendations follow the general principles set by this strategic policy framework.

National

Future Wales: The National Plan 2040, Welsh Government (2021)

- 2.2 This document replaces the Wales Spatial Plan and acts as the national development framework, guiding development and where investment should be in Wales to 2040. This framework will be built on by Strategic Development Plans at a regional level and LDPs at a local authority level, to identify the location of new development and infrastructure. This document supports and helps deliver the aims of the Economic Action Plan.
- 2.3 The prosperity of the country has been altered by the Covid-19 Pandemic and therefore working patterns in terms of location and hours may change. Future Wales supports the provision of infrastructure to support these changing work patterns. Additionally, there is no 'one size fits all' approach to strengthening, diversifying and increasing the resilience of the Welsh economy meaning support must be given to new and existing businesses of all sizes.
- 2.4 11 Outcomes were created as overarching ambitions for Wales for the next 20 years which will link all policies together and describe "A Wales where people live:
1. *And work in connected, inclusive and healthy places*
 2. *In vibrant rural places with access to homes, jobs and services*
 3. *In distinctive regions that tackle health and socio-economic inequality*
 4. *In places with a thriving Welsh language*
 5. *And work in towns/ cities which are a focus and springboard for sustainable growth*
 6. *In places where prosperity, innovation and culture are promoted*
 7. *In places where travel is sustainable*

8. *In places with world-class digital infrastructure*
9. *In places that sustainably manage their natural resources and reduce pollution*
10. *In places with biodiverse resilient and connected ecosystems*
11. *In places which are decarbonised and climate-resilient.”*

2.5 Policy 1 states key areas for development with an aim to focus large scale growth on the urban areas, allowing productive agricultural land to be protected as development pressures are channelled away from the countryside.

2.6 Policy 6, ‘Town Centre First’ states that *“Significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres. They should have good access by public transport to and from the whole town or city and, where appropriate, the wider region. A sequential approach must be used to inform the identification of the best location for these developments, and they should be identified in Strategic and Local Development Plans.”*

2.7 Housing, economic growth, digital and transport connectivity infrastructure should be co-ordinated and planned on the basis of the whole region, particularly through a new Strategic Development Plan for the South East. Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan to ensure that all parts of the region are working together to achieve the region’s goals. Such a plan should focus on the movement of people across the region and support an integrated approach to strategic land-use and transport planning. *“Key locational decisions, including for employment centres, strategic housing growth and services, should focus on the most sustainable and accessible locations, address congestion, reduce car-based commuting and improve air quality. The region should consider its connections with the Mid Wales and South West regions and the West of England region.”*

National Growth Areas

2.8 Three national growth areas are identified, with priorities for housing, economic development and investments. These growth areas cover Wrexham and Deeside (North Wales), Swansea Bay and Llanelli (Mid and South West Wales) and Cardiff, Newport and the Valleys (South East Wales).

2.9 The Vale of Glamorgan falls within the South East Wales Growth Area where Cardiff, Newport, and the Valleys are identified as priority areas for growth. Within the wider

growth area, the focus is on strategic economic and housing growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure. Key investment decisions will seek to support places in the National Growth Area and the wider region. 'Policy 36 - South Wales Metro' states that Strategic Development Plans and LDPs *"should plan growth and regeneration to maximise the opportunities arising from better regional connectivity, including identifying opportunities for higher density, mixed use and car free development around new and improved metro stations"*.

- 2.10 More specific to the Vale of Glamorgan is the existing and future role of the Cardiff Airport and Bro Tathan Enterprise Zone, and the Port of Barry. 'Policy 10 – International Connectivity' identified that *"Cardiff Airport is an essential part of Wales' strategic transport infrastructure. It is an international gateway connecting Wales to the world and is an important driver within the Welsh economy. Cardiff Airport is located within the Cardiff Airport and Bro Tathan Enterprise Zone which offers opportunities for investment in the site and surrounding areas. The Enterprise Zone offers a wide range of development sites and business accommodation, providing opportunities for the development of bespoke facilities or investment in existing accommodation"*. 'Policy 35 – Valleys Regional Park' noted that *"The region is served by ports at Newport, Cardiff and Barry. Each plays an important economic role and collectively they are key infrastructure within the region. Strategic and Local Development Plans should consider the role of the ports locally, regionally and nationally and establish frameworks to support their operation and potential expansion"*.
- 2.11 Within rural locations, Future Wales stated that growth should consider how developments deliver balanced age communities as well as the role of affordable housing, employment, and local services. It also highlighted the importance of digital and mobile connectivity in delivering economic success, in accordance with nationwide Policies 4 ('Supporting Rural Communities') and 5 ('Supporting the Rural Economy')

Planning Policy Wales, 11th Edition, Welsh Government (2021)

- 2.12 Planning Policy Wales (PPW) 11th Edition sets out the land-use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs) which are discussed below. Together with several circulars and policy clarification letters, PPW and the TANs comprise the national planning policy for

Wales. National planning policy, alongside Future Wales (discussed above) should be considered in the preparation of LDPs.

- 2.13 Chapter 5 '*Productive and Enterprising Places*' of PPW 11 sets out national policies for economic development. For planning purposes, the Welsh Government defines economic development as "*the development of land and buildings for activities that generate sustainable long term prosperity, jobs and incomes...*" "*Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism, and public services.*"
- 2.14 The document states the importance of the planning system supporting economic growth and ensuring that there is sufficient land to meet the needs of the employment market at both a strategic and local level. "*Development plans should identify employment land requirements, allocate an appropriate mix of sites to meet need and provide a framework for the protection of existing employment sites of strategic and local importance.*"
- 2.15 "*Wherever possible, planning authorities should encourage and support developments which generate economic prosperity and regeneration. Sites identified for employment use in a development plan should be protected from inappropriate development.*"
- 2.16 Plans and decisions need to be based on an up to date and locally/sub-regionally specific evidence base which demonstrates the "*suitability of the existing employment land supply as well as future provision in relation to the locational and development requirements of business.*" That evidence base should include an Employment Land Review (ELR).
- 2.17 "*Planning authorities should work with each other and with relevant economic fora in order to prepare an ELR. The review should include an assessment of anticipated employment change and land use together with estimates of land provision for employment uses showing net change in land/ floorspace. This should be calculated for offices, industrial and warehouse uses separately. This evidence should help inform an economic vision for the area. Employment Land Reviews should be kept up to date and relevant to prevailing market conditions and the needs of the development plan.*"

- 2.18 Local Authorities should work together to identify strategic employment sites at a regional scale for which sites best serve the area as a whole. These sites should have *'unique selling points and provide a differentiated offer across the region'* and therefore it is not necessary to designate strategic employment sites within every local authority. These sites should be protected from alternative non-employment uses.
- 2.19 In addition, local planning authorities should steer economic development to the most appropriate locations, including provision of strategic scale sites, by:
- Coordinating development with infrastructure provision
 - Supporting national, regional and local economic policies/strategies
 - Aligning jobs and services with housing (where possible) to reduce the need for travel, especially by car
 - Promote the re-use of previously developed vacant and underused land
 - Delivering physical regeneration and employment opportunities to disadvantaged communities.
 - Control and manage the release of unwanted employment sites to other uses
 - Propose specific locations for locally and strategically important industries which are detrimental to amenity and may be a source of pollution
 - Identify protection zones around land and premises that hold hazardous substances and protect the ability of existing businesses to operate or expand by preventing the incremental development of vulnerable uses in the locality.
- 2.20 Innovative business and technology clusters may also be important to the economic growth of a local authority area as businesses benefit from shared facilities, infrastructure, skilled and qualified labourers, common supply chains and links to higher education. Development plan policies need to identify potential networks and cluster areas, and set policies for the creation of the transport, environmental and telecommunications infrastructure needed to support such networks. Planning authorities should also look favourably on any renewable and low carbon energy generation proposals designed to serve clusters.
- 2.21 New business creation is essential to sustain and improve rural economies, particularly as recent events such as the climate emergency, coronavirus pandemic and exiting the European Union all bring economic and social uncertainty. Rural areas will need to be able to respond flexibly to these issues to ensure future

success. *“Many commercial and light manufacturing activities can be located in rural areas without causing unacceptable disturbance or other adverse effects. Micro and small enterprises have a vital role to play in the rural economy and contribute to both local and national competitiveness and prosperity.”*

Technical Advice Notes – Welsh Government

- 2.22 These guidance notes and statements are intended to assist local authority policy makers in the preparation of LDPs. Of relevance to this study is TAN 6: Planning for Sustainable Rural Communities and TAN 23: Economic Development.

TAN 6: Planning for Sustainable Rural Communities (2010)

- 2.23 This TAN highlights that *“strong rural economies are essential to support sustainable and vibrant rural communities.”* Development plans should facilitate diversification of the rural economy, accommodating the needs of both traditional rural industries and new enterprises, whilst minimising impacts on the local community and the environment.
- 2.24 Meeting the economic needs of rural communities will require the provision of a diverse range of employment sites. Where possible such sites should be located within or adjacent to settlements. A rural employment exception policy may also be required, setting out the criteria against which planning applications for employment use on the edge of settlements, on sites which are not specifically allocated in the development plan, will be assessed. The expansion of existing rural businesses, including businesses that are in the open countryside should be supported, providing there are *“no unacceptable impacts on local amenity.”*
- 2.25 If there is a shortfall of employment land in the local authority area then planning authorities should resist development proposals that could result in the loss of employment sites, unless the applicant puts forward land or property of equivalent or greater employment value.
- 2.26 Planning authorities should also encourage the growth of self-employment and micro businesses by supporting home working. Planning applications for employment premises at home should be supported and development plans should identify new opportunities for home/work developments.

- 2.27 Farm conversions to employment uses will often be appropriate in rural areas. Appropriate uses at such locations could include food and timber processing and packing, services (offices, workshop facilities, equipment hire and maintenance), sports and recreation services, the production of non-food crops and renewable energy.

TAN 23: Economic Development (2014)

- 2.28 This TAN provides guidance on planning for economic development at a strategic level, identifying and assessing the economic benefits of development proposals and establishing an evidence base to support the economic development policies of LDPs.
- 2.29 Echoing PPW, the TAN advises that local planning authorities should aim to provide the land that the market requires (unless there are good reasons to the contrary). *“Local planning authorities should recognise market signals and have regard to the need to guide economic development to the most appropriate locations, rather than prevent or discourage such development.”*
- 2.30 However, there may also be instances when planning authorities do not provide the land the market demands, in the places where the market demands it. Proposed developments or site allocations may be resisted because they would have unacceptable environmental impacts, divert demand from town centres or would go against agreed spatial strategies. In these circumstances planning authorities should look for alternative sites which offer the same, or very similar, advantages.
- 2.31 A sequential test should also be applied to economic development proposals or possible employment land allocations. First preference should be given to sites within the boundaries of settlements (including planned new settlements and urban extensions), then edge-of-settlement sites and finally land in the open countryside. Land may be identified in less preferable locations if the resulting benefits (i.e. jobs accommodated, alternatives, special merit) *“outweigh any adverse impacts of the development.”*
- 2.32 Local authorities are encouraged to work jointly in sub-regional groups to prepare joint economy evidence bases, including an analysis of the sub-regional commercial and industrial property market. Such sub-regional strategies should also focus on identifying strategic sites of national and regional importance.

- 2.33 Where a planning authority is assessing a site allocation or planning application that could cause social or environmental harm, there are three issues which need to be considered:
- *“Alternatives: if the land is not made available (the site is not allocated, or the application is refused), is it likely that the equivalent demand could be met on a site where development would cause less harm, and if so where?”*
 - *...Jobs accommodated: how many direct jobs will be based at the site?*
 - *...Special merit: would the development make any special contribution to policy objectives?”*
- 2.34 An example of a development of ‘special merit’ could be a greenfield development that could attract high-value, high-skill businesses that would not be interested in a lower-quality urban environment.
- 2.35 In rural areas, development may be acceptable in countryside locations if it makes communities more sustainable (encouraging people to work close to home), meets the expansion needs of an existing local business or an existing business cluster.
- 2.36 In producing LDPs, local planning authorities should:
- Develop a broad vision for the Plan which *“must be consistent and coherent so that the economic, social and environmental considerations support each other”*
 - Set land provision targets which meet the market demand for land. Local authorities should work together to steer development to sustainable locations.
- 2.37 In terms of forecasting future growth, the TAN, echoing Planning Policy Wales, advocates *“a broad assessment of anticipated employment change by broad sector and land use”*. Specifically, this will require *“the preparation of possible future economic scenarios with plans developed in a way which ensures they are robust across the more likely scenarios and contain the flexibilities necessary to adjust to changing circumstances. The starting point for scenarios would normally be past trends at a regional level. Such scenarios could be adjusted to reflect different policy or demographic assumptions.”*

- 2.38 The TAN accepts that such forecast modelling can often be imprecise – *“Models of future economic scenarios are surrounded by a large margin of uncertainty, and often more so for individual authorities than for larger areas. Modelling may be most successful when based on functional economic areas such as travel to work areas and housing market areas.”*
- 2.39 Where projected local authority growth differs markedly from that expected for the wider region, *“the authority should provide an evidence-based justification for these differences, much as they would have to in respect of population projections for their area.”* Predicted employment figures should usually be expressed as a range of scenarios to reflect different economic outcomes and policy options. Ultimately however, *“the level of growth envisaged must be realistic, able to withstand scrutiny and be consistent with the other aspirations of the plan including population and housing projections.”*
- 2.40 Finally, the TAN highlights that existing employment sites should only be released for other uses if:
- *“They have poor prospects of being re-occupied for their previous use*
 - *And/or the particular market that the site is part of is oversupplied*
 - *And/or the existing employment use has unacceptable adverse impacts on amenity or the environment*
 - *And the proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained*
 - *Or other priorities, such as housing need, override more narrowly focused economic considerations.”*

Development Plans Manual, Edition 3, Welsh Government (2020)

- 2.41 The Development Plans Manual is a reference document for the preparation and implementation of development plans. It contains practical guidance on how to prepare, monitor and revise a development plan, underpinned by robust evidence to ensure that plans are effective and deliverable and contribute to placemaking.
- 2.42 The Manual highlights that *“while there is not always a direct correlation between jobs and homes, they need to be considered collectively when assessing growth levels and developing a sustainable strategy; the aim being to achieve a balance between homes and jobs thereby reducing the need for commuting. The scale of economic growth to be delivered in a plan will be strongly influenced by the available*

labour force, skills, net migration levels, commuting patterns, housing provision and infrastructure. Links to the regional and sub-regional context should also be considered, taking account of functional linkages and geographical synergies between places to achieve better planning outcomes.”

- 2.43 The scale of economic growth and housing expressed in the plan should be a judgement between the unconstrained need against supply factors which constrain the ability of the plan to deliver, resulting in adjusted growth levels and the requirement of the plan.
- 2.44 The level of unconstrained need is based on current levels of need/demand at a point in time, i.e., the current/baseline situation (homes and jobs), as demonstrated by evidence. *“Trend based forecasts quantify a variety of outcomes, based on a series of assumptions, extrapolating the level of need forward to cover the whole plan period. The forecasts used should relate directly to the range of issues and land uses the plan is seeking to address, for example changes in population and the need for additional homes to accommodate this change.”*
- 2.45 Once the total need, unhindered by any constraint has been determined, i.e., the unconstrained need, LPAs will then have to consider what constraints may apply that would influence the level of need, supply factors.
- 2.46 *“It is crucial how these two elements are considered, balanced and evidenced to identify the plan requirement. There should be a strong link between the scale of growth set out in the requirement, the overall vision of the plan and delivering on the key objectives. It would not be prudent for an LPA to consider maximising economic prosperity but reducing the supply of housing to a level which will not generate a sufficient labour force to fulfil the employment needs. Similarly, there should not be housing without jobs; a balance needs to be achieved within the development plan strategy.”* Table 2 summarises the need and supply factors which relate to employment land reviews.

Table 2 – Employment Need and Supply Factors

Demographic and Need Based Considerations	Trends Based Considerations	Delivery Considerations and Constraints	Policy Based Considerations
NEED AND DEMAND FACTORS		SUPPLY FACTORS	
<p>Latest Population and Household Projections (Welsh Government Latest)</p> <ul style="list-style-type: none"> Working age profile Economically active Migration rates Age profile <p>Employment Land Review</p> <ul style="list-style-type: none"> Identification of existing employment sites Identification of existing employment land/jobs by use class, broken down into SIC code Job growth (if appropriate) Forecast growth or decline in Class B and other employment land uses Need for a buffer to act as a flexibility allowance <p>National and regional economic growth strategies Generate growth forecasts for non-Class B employment uses</p>	<p>LDP - AMRs</p> <p>Unemployment rates (comparison to local, national and UK averages)</p> <p>Commuting patterns and rates</p> <p>Level of self-employment and home based working, plus potential trends</p> <p>‘Churn’ and replacement of existing employment units</p> <p>Vacancy rates and surplus of sites/premises by type and sector</p> <p>Delivery of employment land / take up linked to past build rates - What is employment take up over different periods, e.g., 5, 10, 20 and 25 years?</p> <p>Current and future demand for employment sites by type / sectors including rural economic growth</p> <p>Development on Enterprise Zones</p>	<p>Role and function – capacity (physical, social and environmental) at places to accommodate growth</p> <p>Infrastructure capacity and costs</p> <p>Site availability and deliverability including phasing</p> <p>National environmental constraints – e.g., flooding, contamination and European designations</p> <p>Developer type/ capacity/potential to deliver growth levels – e.g., competition between sites with similar market offers in neighbouring LPAs</p> <p>Access to markets and end users</p> <p>Skill set of local workforce</p> <p>Land values</p> <p>Overage / claw back clauses (e.g., payment of a financial sum upon commencement of development)</p>	<p>Alternative demographic scenarios:</p> <ul style="list-style-type: none"> Target increase in working age profile and economically active Changes to migration assumptions – e.g., rates of in/out migration linked to economically active <p>Settlement hierarchy and settlement boundaries</p> <p>Number and level of jobs proposed – e.g., specialist and local</p> <p>Scale and location of new employment sites (key / local) - B1, B2, B8 including:</p> <ul style="list-style-type: none"> Identification of Enterprise Zones Safeguarding of key existing employment sites Loss of employment land to alternative uses <p>Relationship to housing growth</p>

Source: Welsh Government, 2020

Economic Resilience & Reconstruction Mission, Welsh Government (2021)

- 2.47 This document has been developed in the context of dealing with the dual impact of the Covid-19 Pandemic and Brexit and is an evolution of the Welsh Government Economic Action Plan. This document builds upon '*Prosperity for All: The Economic Action Plan*' and takes forward the priorities from '*Coronavirus Reconstruction: Challenges and Priorities*'.
- 2.48 The vision is to create a '*well-being economy which drives prosperity, is environmentally sound, and helps everyone realise their potential*'. In order to achieve this vision, one of three outcomes is to create a Prosperous Economy. This can be achieved through the support of the Foundational Economy and a diverse range of businesses with good productivity levels and skilled workforces.
- 2.49 Five beacons have been created for delivery of medium-long term recovery from Covid-19, building upon policies which have been adapted to meet the challenges of the pandemic. They are:
- Strengthening the Foundational Economy
 - Covid Commitment to protecting and enabling skills and employment
 - Accelerating adaption for recovery and future prosperity
 - Magnetising investment in a green recovery
 - Fortifying the pursuit of social value.
- 2.50 Town Centres can no longer rely on just retail to thrive and therefore, as part of the 'Transforming Towns' agenda, new economic opportunities and employment must be brought back to Town Centres. This links to the 'Town Centre First' policy (Policy 6) in Future Wales, noted above. This should be as part of a wider offering of leisure, learning, local services, and cultural activities. It is a long-term ambition for Welsh Government for 30 percent of Welsh workers to be working flexibility and remotely. Additionally, there is the opportunity to re-purpose Town Centre buildings to create regional co-working hubs, deconcentrating and relocating the workforce back into Town Centre locations when required.
- 2.51 The Covid-19 Pandemic threatens to reverse progress made in Wales over the last decade of reducing unemployment economic inactivity. Welsh Government aims to support and prepare workforce for immediate and long-term challenges (as set out in '*Coronavirus Reconstruction: Challenges and Priorities*' and reviewed below).

Support to be provided for employers/ businesses includes:

- New recruitment support and incentives for apprenticeships
- Training support to upskill workers
- Support the recruitment and retention of disabled people
- Support for workplace well-being/ safe working environments.

Covid-19 Reconstruction: Challenges and Priorities, Welsh Government (2020)

2.52 This document aims to provide the key challenges and priorities for Wales for reconstruction following the Covid-19 Pandemic. With relation to the employment market the Welsh Government aims to:

- *'Reduce unemployment... provide opportunities for people to develop their skills and to acquire new ones*
- *Step up investment in our local town centres to help built resilient communities... providing better access to open space, the creation of remote working hubs, and making sure our public services are more accessible*
- *Focus on the foundational economy and support the growth and independence of Welsh headquartered businesses in order to build the resilience of the Welsh economy in the face of Coronavirus and the end of the EU Transition Period'.*

2.53 Part 1 of the programme is entitled 'Moving Towards Reconstruction' and describes several programmes and pots of money which have been assigned to different projects in order to create a more prosperous Wales including:

- A firm priority - £40 million fund to offer advice and help those over 16 to find work, increase their skills/ qualifications and employability, or start a business
- A £2.4 billion support package, including the Economic Resilience Fund, an emergency support package for small businesses of £200 million and £350 million of non-domestic rates relief
- Setting a target of 30 percent of the country's entire workforce to work from home in the future, to help reduce pollution and congestion.

2.54 Part 2 focuses on the 'Future of Wales'. Government asked individuals, activists, charities and representative bodies to suggest ideas for how to reconstruct a better Wales. The responses split into six categories – Society, Economy, Environment, Health, Political engagement and Digital technology. The importance of supporting people to remain in work or secure employment was a key issue raised, along with supporting Welsh businesses through developing the Welsh brand and bringing

sectors together into hubs. There were also calls for efforts to ensure the economy in Wales is based on renewable energy supplies.

- 2.55 Additionally, remote working arrangements were discussed in order to lead to locally focussed regeneration schemes and provide employment opportunities in emerging sectors. This could encourage more skilled young workers to remain in Wales.
- 2.56 Part 3 of the plan focusses on addressing the bullet points mentioned above in the short term, whilst the longer-term change (Part 4) includes a range of issues such as ‘exploring a financing partnership with local authorities which could extend our capacity to invest together and stimulate employment’.

Smarter working: a remote working strategy for Wales, Welsh Government (2022)

- 2.57 The Welsh Government published this document in 2022 in order to outline its approach to achieving the goal of having 30 percent of the Welsh workforce working at or near to home on a regular basis. They believe that moving towards a remote working model will help to combat climate change through reducing travel while also improving air quality, and the work-life balance and well-being of the Welsh workforce.
- 2.58 The Welsh Government recognises that the pursuit of this goal is not without its risks that take the shape of health and safety (mental health, stress and unsuitable working equipment), unsuitable conditions (feelings of isolation and lack of support structures), city centre economic activity (resultant reduction in town centre footfall), power imbalances (causing overworking) and two tier workforces (increasing inequalities between those who have the ability to work from home and those who don’t). Consequently, the Welsh Government believe recognising these risks is the first step to mitigating them and they will take action by engaging with stakeholders and partners to understand and share best practice.

Cardiff Capital Region

Priority Sectors – CCR

- 2.59 CCR prioritises five sectors for employment and skills support, which largely overlap with some of the sectors prioritised by the Welsh Government:
- Advanced Materials and Manufacturing

- Construction
- Financial, Legal & Professional Services
- ICT/Digital - including creative industries
- Human Foundational Economy.

Cardiff Capital Region City Deal

- 2.60 An Economic Growth Partnership has been established to commission an Economic Growth Plan for the next twenty-year period. A Regional Business Council has also been established to engage with all businesses and articulate their needs. As part of the City Deal, £37.9 million are invested to support the development of a compound semiconductor industry cluster in South East Wales.
- 2.61 Over its lifetime, the City Deal is expected to deliver up to 25,000 new jobs, leverage an additional £4 billion of private sector investment and deliver a five percent uplift in Gross Value Added (GVA). In February 2018, three development strategies were agreed by the CCR cabinet to support the strategic themes of housing, skills, and digital connectivity within CCR and drive the City Deal forward.
- 2.62 The City Deal is also supported by a five-year strategic business plan, which sets out the required actions and outcomes to achieve CCR's long-term objectives, including details of how the Wider Investment Fund can be used in the next five years to act as a catalyst to drive the actions forward.

Cardiff Capital Region Industrial and Economic Plan

- 2.63 The Regional Economic Growth Partnership was established to advise on the implementation of the Cardiff Capital Region City Deal's Wider Investment funds. This Industrial and Economic Plan sets out an ambitious and long-term plan to boost productivity and accelerate economic and inclusive growth in the region by making the Cardiff Capital Region a highly investable proposition, backing businesses to create good and sustainable jobs through targeted investments in skills, priority industries, infrastructure and innovation.
- 2.64 An investment and intervention framework has been established to contain three designated and interconnected investment priorities linked by common focus on securing a coherent, competitive, sustainable and fair regional economy. The three designated investment priorities (Innovation, Infrastructure, and Challenge) will support the delivery of the plan and will be established in partnership with the

investor community to drive forwards the economic ambitions and priorities within the region.

- 2.65 The Innovation investments will focus on opportunities where there is demonstrable competitive strength, leveraging significant other investments which will provide direct returns to the fund. The infrastructure investments will focus mainly on infrastructure projects where the public sector creates the conditions for private sector success and civic benefits. Finally, the Challenge investments will seek to attract the best solutions for specific challenges faced by the region. The ultimate aim of the investments will be improving the business environment within the CCR, creating rich ecosystems that stretch and support the development of key sectors in the economy.
- 2.66 The Industrial and Economic Plan also outlines its plans to enhance existing and develop new educational provisions where required to drive the priorities of our businesses in the region, ensuring that the region has a highly skilled, motivated and forward-thinking workforce with a significant supply of critical skills to enable businesses to flourish over the next decade.
- 2.67 The importance of connectivity, both digital and physical, is also emphasised. Reliable infrastructure that connects the region, both within and wider afield, to boost productivity and prosperity, is deemed critical.

Cardiff Capital Region Industrial and Economic Plan and Covid-19 Addendum

- 2.68 Cardiff Capital Region Industrial and Economic Plan and Covid-19 Addendum sets out 10 priorities to reflect the regional post Covid-19 reality:
1. *“Helping CCR businesses navigate the funding support packages available and surfacing gaps in provision*
 2. *Building a strong evidence base to enable ongoing assessment of Regional Economic Health*
 3. *Reviewing all current City Deal initiatives to ensure they align with CCR economic and social imperatives in a post Covid world*
 4. *Ensuring entrepreneurs and start ups get the support they need*
 5. *Establishing a new ‘Rebuilding Local Economies Challenge Programme’ to capitalise on the levels of business innovation and ingenuity seen throughout the crisis period*
 6. *Developing new, targeted funding interventions and new investment application support mechanisms*

7. *Supporting key businesses in the CCR priority clusters to increase their resilience and capacity for growth through increased flexibility on lending/ investments*
8. *Increasing our overall competitiveness and wealth creation as a region through improving the financial performance of our medium sized businesses*
9. *Accelerating the development of our Med-tech Cluster through encouraging and supporting investment opportunities in Med-tech innovation*
10. *Expediting the creation of resilient industrial clusters with thriving regional eco systems.”*

CCR City Deal Strategic Business Plan Wider Investment Fund (2019)

2.69 In compliance with the Joint Working Agreement the five-year City Deal Strategic Business Plan:

- *“Sets out our current understanding of what is required to achieve the Cardiff Capital Regions long- term objectives*
- *Details required actions and outcomes, only some of which will benefit from Wider Investment funding*
- *Includes details of how the Wider Investment Fund will be used, over the next five years, to act as a catalyst to drive these actions forward*
- *Forms the basis of a more detailed regional strategic economic growth plan and strategy.”*

2.70 The City Deal Funding will act as a catalyst to drive economic momentum by leveraging of wider investments, accelerating the process of change, attracting interest and generating enthusiasm and taking advantage of the entrepreneurial talents that abound in the region.

2.71 The Business Plan identifies four strategic themes they feel can make a real improvement to the well-being of people in the region and, in doing so, support regional objectives, well-being goals and the twin goals, in the Welsh Government’s ‘Prosperity for All: economic action plan’, of growing the economy and reducing inequality. The four themes are as follows:

- Skills and Employment – This will involve addressing skill gaps and shortages, developing higher level skills to futureproof the workforce, increasing the number and range of apprenticeships, developing a regional employability plan to get more people into work and many more interventions

- Innovation – *“Innovation underpins the development and application of ideas and technologies that yield better or new goods and services for the marketplace. Innovation is directly linked to raising productivity. Relative to other regional and international economies, productivity is unacceptably low in the Cardiff Capital Region.”* The Business Plan aims to create an environment that fosters entrepreneurial spirit and the creation of new commercial knowledge by bringing entrepreneurs, government, universities, colleges, funders and corporate entities together and adding in new capability
- Connecting the Region – To enable effective connectivity of all types in the Cardiff Capital Region, improvements to both the digital and transport infrastructure must be made. £734 million has been committed to the Metro as part of the City Deal. will make a significant contribution to improving transport connectivity, unlocking development sites, employment, and housing, providing access to training and employment opportunities, access to leisure and tourism and wider cultural development. The Business Plan also sets out several strategic goals to make the Cardiff Capital Region a ‘Smart Region’, allowing future generations to be fully integrated into a global network
- Regeneration and Infrastructure – With good quality development sites in short supply and a limited availability of ready to occupy premises of all sizes, the City Deal outlines a ‘Strategic Sites Plan’. This plan looks to improve the provision of employment sites, emphasise the refurbishment of existing stock and support specific infrastructure projects to encourage clusters of like-minded industries to emerge and develop, nurturing them as centres of excellence.

Local

The Vale of Glamorgan Local Development Plan 2011-2026 (adopted 2017)

- 2.72 The Vale of Glamorgan Local Development Plan (LDP) provides a framework for sustainable development within the area up to 2026. It outlines the requirements for the delivery and implementation of the sites allocated for development and provides a monitoring framework for measuring the effectiveness of the Plan.
- 2.73 Objective 8 of the LDP is *“To foster the development of a diverse and sustainable local economy that meets the needs of the Vale of Glamorgan and that of the wider South East Wales Region.”*
- 2.74 An LDP Strategy focus is to promote development in Barry and the South East Zone.

The St Athan-Cardiff Enterprise Zone is identified as a Strategic Opportunity Area with a focus on the aerospace sector and investment in and around the land holdings of the Welsh Government and the Ministry of Defence. Cardiff Airport is also identified as a focus for transport and employment investment.

- 2.75 Policy SP5 – ‘Employment Requirements’ specifies that in order to ensure the continued prosperity of the Vale of Glamorgan and promote growth in the capital region, 492 ha (369 ha net) of land is allocated to meet regional and local employment needs.
- 2.76 Policy MG9 allocates 437.56 ha (314.23 Ha net) of land on three major employment sites at Land to the south of M4 Junction 34 (Hensol), Land adjacent to Cardiff Airport and St. Athan Aerospace Business Park to meet regional need. Another 54.68 ha in eight sites is allocated to meet local employment land needs (see Table 3).
- 2.77 Policy MD16 – Protection of Existing Employment Sites and Premises states that at existing employment sites and premises proposals for non B1, B2 and B8 employment uses will only be permitted where:
- The proposal is for ancillary or sui generis uses that would not singularly or cumulatively lead to a material change in the nature of the employment site
 - The existing employment use has unacceptable adverse impacts on amenity or the environment
 - Land of equal or better quality is made available for employment uses elsewhere
 - It is demonstrated that the site or premises is no longer suitable or viable for employment purposes
 - The proposal would not prejudice existing or neighbouring employment uses, have an unacceptable impact on amenity or the environment and would not lead to a material change in the nature of the employment site.

Table 3 – Land Identified for Employment Uses in the Vale of Glamorgan adopted LDP

Site	Uses	Site Size Gross (ha)	Site Size Net (ha)
Strategic Employment Sites			
1 Land to the South of Junction 34 M4 Hensol	B1, B2, B8	55.16	29.59
2 Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	B1, B2, B8	77.4	76.64
3 Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	Aerospace Business Park, Employment & education	305	208
<i>Sub-Total</i>		437.56	314.23
Local Employment Sites - LDP			
4 Atlantic Trading Estate	B1, B2, B8	9.14	9.14
5 Land at Ffordd y Mileniwm	B1, B2, B8	8.9	8.9
6 Hayes Lane, Barry	B1, B2	1.4	1.4
7 Hayes Road, Sully	B1, B2	7.5	7.5
8 Hayes Wood, Barry	B1, B8	1.9	1.9
9 Llandow Trading Estate	B1, B2, B8	6.8	6.8
10 Vale Business Park	B1, B2, B8	12.4	12.4
11 Land to the South of Junction 34 M4 Hensol (Local land)	B1, B2	6.64	6.64
<i>Sub-Total</i>		54.68	54.68
Total		492.24	368.91

Source: Vale of Glamorgan Council, 2017

Vale of Glamorgan Employment Land and Premises Study (2013)

- 2.78 Completed by BE Group, this study assessed the supply and demand for employment land in the Vale of Glamorgan to inform its then emerging Local Development Plan for the period 2011-2026.
- 2.79 The Study identified a potential employment land resource, at 31st March 2013, of 488.80 ha, located across 13 sites. This comprised 433.50 ha of strategic employment land – Land at the St Athan – Cardiff Enterprise Zone, plus Land South of Junction 34, M4, Hensol – and 55.30 ha from local employment sites.
- 2.80 BE Group also provided forecasts of future demand for Employment Land over 2011-2026, using the Long Term Land Take-up, Employment Based and Labour Supply methods in the process. Table 4 summarises the results with Table 5 summarising the results when differing supply scenarios were considered.

Table 4 – Land Forecast Models – Summary (Local Employment Sites Provision)

Model	Land Stock 2013 ¹ , ha	Land Need 2011-2026, ha	Buffer (5 years take-up rate), ha	Surplus (shortfall), ha	Assumptions
Long Term Land Take-up	55.30	39.75	13.25	2.30	Based on historic (17 years) take-up of 2.65 ha/pa
Employment Based	55.30	-0.11/1.02	13.25	42.16/41.03	Based on projected growth/reduction of employment in industry sectors and inclusion of historic take up buffer
Labour Supply	55.30	0.81/0.89	13.25	41.24/41.16	Based on population projections and industry sector changes (growth/reduction) and impact on floorspace (and thus land) need, and inclusion of historic take up buffer.

Source: BE Group 2013

¹ N.B. Amended headline supply at 31 March 2013

Table 5 – Land Forecast Models Reflecting Perceived and Residual Supply

Model	Land Need, ha 2011-2026 (Including 5 years Buffer)	Perceived Surplus (Shortfall) to 2026 Headline Supply (55.30 ha)	Predicted Surplus (Shortfall) to 2026 Realistic Supply (52.84 ha)
Long Term Land Take-up	53.00	2.30	(0.16)
Employment Based	13.14/14.27	42.16/41.03	39.70/38.57
Labour Supply	14.06/14.14	41.24/41.16	38.78/38.70

Source: BE Group 2013

2.81 Ultimately, BE Group recommended that Vale of Glamorgan Council used the roll forward of historic take-up as the main measure of the Vale's future land needs for the period 2011-2026. This indicated a need of 53.00 ha, comprising 39.75 ha, plus a five year buffer of 13.25 ha to reflect a choice of sites and to provide a continuum of supply beyond the end of the Plan period.

- 2.82 In terms of land supply, *“At March 31st 2013 the headline supply of available land in the Vale was 488.80 ha, which suggests there is a very substantial surplus, based on historic trends. However, 433.50 ha of this comprise three strategic sites which will accommodate large scale footloose inward investment projects. The local employment sites provision, which will meet the specific needs of Vale of Glamorgan, is a more modest 55.30 ha and it is this supply that should be measured against forecast demand.”*
- 2.83 Measuring need against supply indicated that there was no need for the Council to identify further land allocations for B1, B2, B8 uses, other than those already put forward in the emerging LDP and which are now set out in Policy MG9 of the subsequently Adopted LDP (see Table 3 above).
- 2.84 However, in terms of strategic land supply BE Group did recommend that *“Vale of Glamorgan Council provisionally use a figure of 312.90 ha as the realistic strategic land supply of the Vale... also... that 6.64 ha of Land South of Junction 34, M4 be allocated to meeting local needs for B1 and B2 accommodation. This would be subject to the submission of an outline planning application, by Renishaw, that includes the B1/B2 business park proposal as part of a wider development scheme.”*

Vale of Glamorgan Further Advice on Employment Land and Premises Study (2015)

- 2.85 Following on from the 2013 Employment Land and Premises Study, discussed above, BE Group was commissioned by Vale of Glamorgan Council to provide additional advice on employment growth and its potential implications for employment land and housing needs.
- 2.86 The document referenced the Deposit LDP which identified the following strategic sites, totalling 433.5 ha (gross area):
- Land south of Junction 34 of the M4 (51.1ha)
 - Land adjacent to Cardiff Airport and Port Road, Rhoose (77.4ha)
 - Aerospace Business Park, St Athan Rhoose (305ha)
- 2.87 BE Group estimated that the St Athan and Cardiff Airport Enterprise Zone would create a demand of 700-1,200 households by 2026. This figure was based on the assumption that the Enterprise Zone would employ 1,500-2,500 workers by 2026.

- 2.88 Those *“1,500-2,500 workers employed at the Enterprise Zone by 2026 would be a successful outcome for the project. To reach this employment figure would require an acceleration of the relocation of businesses to the St Athan and Cardiff Airport areas. Furthermore, given it is a specialist aviation Enterprise Zone, there is likely to be substantial lead times on growth of the site, even with the existing infrastructure and the impetus of the Enterprise Zone designation. The nature of specialist economic areas can be such that it can take several years for momentum on the site to take hold before a more rapid period of growth as the area matures. Therefore, it is BE Group’s opinion that the 2,500 employment figure would be an upper level as at 2026.”*
- 2.89 In terms of the Land south of Junction 34 of the M4, Hensol, planning documents estimated that the proposed development would bring 3,110 FTE jobs. However, with there being a higher proportion of logistics uses proposed at the site, it was estimated that the total employment would likely be lower, some 1,600-2,000 FTE jobs. The market for the strategic site was narrow at the time of writing, with better located regional distribution sites being found to the east (Bristol, Chepstow, Cardiff). Therefore, take up on the site was likely to be slow despite its relatively strong position in the context of the Vale of Glamorgan.

Vale of Glamorgan LDP Supplementary Planning Guidance (SPG) – Cardiff Airport and Gateway Development Zone (2019)

- 2.90 This document was prepared to provide support and additional detail to the relevant policies in the adopted LDP, regarding Cardiff Airport and the adjoining strategic employment site, to ensure the delivery of a comprehensive, high quality sustainable development.
- 2.91 The overall vision for the Cardiff Airport and St. Athan Enterprise Zone was: *“to strengthen the foundations already in place, to maximise the opportunities for Cardiff Airport and for St. Athan to become an internationally recognised centre of excellence for the aerospace industry and Maintenance, Repair and Operations activities.”* Also *“to create a major business destination at Cardiff Airport that complemented the existing and proposed offers of Barry and rest of the Vale of Glamorgan as well as the wider Capital region by becoming a:*
- *recognised base for a range of aerospace companies*
 - *business destination for related local and international business*

- *specialist location for education, training, research and development and*
- *a major transport interchange.”*

2.92 The Cardiff Airport and Gateway Development Zone comprises two distinct areas in the north: Cardiff Airport and the adjoining strategic employment site (referred to as the Airport Business Park) and two in the south: the undeveloped part of the strategic employment site and the proposed extension to Porthkerry Country Park. The SPG then sets out criteria for the physical development of the site and the transport investment requirements.

St Athan – Cardiff Airport Enterprise Zone Strategic Plan 2018 – 2021 (2018)

2.93 The St Athan – Cardiff Airport Enterprise Zone was one of eight Enterprise Zones that support new and expanding businesses by providing business infrastructure and support. The Enterprise Zone combined both the St Athan MoD base and Cardiff Airport, including adjacent greenfield land owned by the Council and Legal and General, in a single Zone.

2.94 Since the Zone’s inception:

- Aston Martin chose St Athan Aerospace Business Park to be the site of its second manufacturing location
- Cardiff Airport increased passenger numbers by 48 percent
- Bristow Helicopters contractors Balfour Beatty completed construction of a £5 million facility for Search and Rescue covering south Wales and the south west of England here
- The development of the Picketston site at St Athan saw several SMEs locating there, with job numbers expected grow to in excess of 150.

2.95 The EZ Board identified the key priorities and objectives for the further development of the Zone moving forward, these included Priority 2 - The development of the Aerospace Business Park (ABP) at St Athan to fulfil the potential of the site to create significant economic growth. This included strategic aims of:

- Promote Cardiff Airport and St. Athan Enterprise Zone as a quality environment in which to do business
- Secure the long-term functioning of the Aerospace Business Park to promote inward investment and accommodate growth in business
- Maintain Wales’s competitive advantage in the aerospace sector, particularly manufacturing and maintenance, repair and operations (MRO)

- Capitalise on the siting of the Aston Martin plant as a catalyst for further investment
- Enhance the capacity of the Aerospace Business Park to accommodate automotive and other non-aerospace businesses
- Grow the levels of high-quality, sustainable employment at the Aerospace Business Park.

2.96 To achieve this, objectives included:

- Acquisition of the Aerospace Business Park freehold
- Improve Site entry and security arrangements
- Road infrastructure – a new Northern Access Road will provide substantially improved road access to the northern side of the Aerospace Business Park, which will be the main access point to the site in the future
- Improvements to the A4226 (Five Mile Lane) and access to the wider EZ
- Airfield operations – to retain St. Athan as a fully operational airfield
- Transfer of the airfield to civilian control is essential to secure the Aerospace Business Park’s viability as a location for both existing aerospace sector tenants and future aerospace-related development
- Preparation of development plots – in order to expand commercial activity within the Aerospace Business Park, a number of infrastructure measures are needed across different areas of the ABP to make plots suitable for large scale private investment
- Take advantage of the space available and configuration of the Aerospace Business Park (including the operational runway) to prepare for both aerospace and non-aerospace investment activity
- Making strategic sites ready for major large-scale inward investment
- Preparing specific development plots for the market generally.

Cardiff Airport 2040 Masterplan (2018)

2.97 The Cardiff Airport 2040 Masterplan set out the ambitious plans for growth over the next 20 years, for the Airport to become a key gateway to the UK. The project sought to further travel opportunities and freight operations from Cardiff Airport.

2.98 *“The following principles set out a guide for the expansion and improvement of the Airport that the Masterplan seeks to promote:*

- *A new terminal, focused on optimising the customer experience and providing a*

distinctive welcome to be designed and orientated to allow interface with the Enterprise Zone and potential business and commercial developments

- *Replacement aircraft parking stands to be provided for a mix of aircraft, including contact and remote stands*
- *A new cargo terminal*
- *New dedicated road access to be provided for the terminal from the A4226, separating Airport traffic from other uses, including surface connectivity to the Enterprise Zone*
- *Improvements to pedestrian and cycle access to and through the Airport site, including links to Rhoose and Barry*
- *Future integration with the Metro with a safeguarded bus link as well as an improved, dedicated connection between the terminal and Rhoose Cardiff International Airport railway station to improve the transfer experience*
- *Open space, public realm and landscaping improvements 8. Safeguarded land for expansion*
- *Improved rail links.”*

Livestock Market Feasibility Study (2018)

2.99 This report was commissioned by the Vale of Glamorgan’s Council in order to ascertain the needs of local farmers and to determine whether a viable multi-purpose livestock market is needed in the area.

2.100 In order to come to a conclusion, an extensive programme of consultation and engagement was undertaken. This included 95 individual conversations being held with farmers, producers, Council Members and officers, Welsh Government officials, educational establishments, farming unions, rural organisations and local business. A further 120 people responded to an online survey.

2.101 A multi-function auction centre was recommended as the preferred option to take forward in light of the findings from this initial feasibility study. This should comprise:

- Mixed livestock sales – sheep and store cattle together with occasional specialist sales.
- A flexible auction room to accommodate wide range of other auctions/sales from farm machinery to household goods and antiques.
- Mini-business centre supporting rural business and food production.
- Potential to expand into wider rural business park.

2.102 It was found that the development would meet the needs of farmers and other stakeholders in the region. Meanwhile, there was the potential that it could stimulate wider market interest as providing a high-quality market facility could prove attractive to producers and buyers who may respond better to the growth potential.

Livestock Market Demand Update (2021)

2.103 The Livestock Market Demand Update was commissioned by the Vale of Glamorgan in order to update and refresh the Livestock Market Report conducted in 2018 and reviewed above. The reports sought to assess the potential demand for a multi-purpose livestock market to support farmers in the Vale of Glamorgan and surrounding areas.

2.104 The Cowbridge Livestock Market ceased operating on 1st September 2020 due to the Council's plans to re-develop the site. Consequently, this document looks at the demand for another Livestock market at another site within the Vale of Glamorgan.

2.105 *"This refresh study has not made any further consideration of the commercial viability or capital investment requirements for a new multi-function market. However, on the basis that there remains demand potential in line with the original report findings the financial projections included in the 2018 report should be considered to remain broadly valid and relevant today albeit subject to updating due to inflation. The key message then was that a new market could be considered to become operationally viable over time but would not generate sufficient residual profit to cover the capital costs or loan repayments. Any new facility would still need to be heavily subsidised through public sector investment."*

3.0 SOCIO-ECONOMIC PROFILE

Introduction

- 3.1 This section brings together several data sources including Census, Business Register and Employment Survey (BRES) and ONS data to create a profile of the employment market of the Vale of Glamorgan. It helps to consider the size of the economy, dominant business sectors and what types of businesses are present within the Vale. Where possible, data has been compared to the nine other local authorities in the Cardiff Capital Region – Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taff (RCT) and Torfaen.

Demographic Assessment

- 3.2 According to ONS Population Estimates, the Vale of Glamorgan had a total of 135,295 residents in 2020, with Table 6 providing a comparison to neighbouring authorities in the Cardiff Capital Region. The Vale had the sixth largest population in the sub-region and accounted for 4.3 percent of the Welsh total. The proportion of the population of working age, 16-64 years old, in the Vale of Glamorgan was 60.3 percent, below the average in the Cardiff Capital Region as well as the Welsh national average (62.0 percent and 61.2 percent respectively)

Table 6 – Total Population (2020)

Area	Total Population	Population aged 16-64	Proportion of 16-64 year olds
Blaenau Gwent	70,020	43,637	62.3%
Bridgend	147,539	91,186	61.8%
Caerphilly	181,731	112,583	62.0%
Cardiff	369,202	248,400	67.3%
Merthyr Tydfil	60,424	37,453	62.0%
Monmouthshire	95,164	55,629	58.5%
Newport	156,447	97,743	62.5%
Rhondda Cynon Taff	241,873	150,231	62.1%
Torfaen	94,832	57,751	60.9%
Vale of Glamorgan	135,295	81,540	60.3%
<i>Wales</i>	<i>3,169,586</i>	<i>1,938,266</i>	<i>61.2%</i>

Source: ONS Population Estimates, 2021

- 3.5 The Welsh Indices of Multiple Deprivation were last updated in 2019, and of the 79 Lower Layer Super Output Areas (LSOAs) of the Vale of Glamorgan, three were ranked in the top ten percent most deprived in Wales. These LSOAs were located to the north of Merthyr Dyfan, north of Barry and to the south of Cowbridge in an area

that incorporates Llanblethian and Llandough. This equates to 3.8 percent of the Vale of Glamorgan's LSOAs being in the most deprived ten percent of the country, suggesting the prevalence of extreme deprivation is quite low.

- 3.6 Conversely, 49 (or 62.0 percent) of the LSOAs in the Vale of Glamorgan were in the top 50 percent least deprived LSOAs in Wales and over a quarter of the LSOAs (22) are found in the top ten percent least deprived in Wales. Thus, overall, the Vale has a low level of deprivation.
- 3.7 The diversity in the socio-economic characteristics throughout the Vale of Glamorgan will in turn have had a significant impact on how the impacts of the Covid-19 Pandemic were felt in each different area. Areas of high deprivation, home to low income workers, will likely have seen many workers furloughed, particularly those in low-paid sectors such as the retail/ hospitality industries. Additionally, people in areas of high deprivation are also likely to have a greater range of health issues and low educational attainment, both factors which may have been impacted on by the Pandemic and intermittent school closures.

Employment Growth

- 3.8 Business Register and Employment Survey (BRES) data provides details on the number of jobs within differing industry sectors in a local authority area (see Table 7).

Table 7 – Economic Activity, 2020

Sector	Employment Structure			
	Vale of Glamorgan		Cardiff Capital Region	Wales
	Number	Percent	Percent	Percent
1: Agriculture, forestry and fishing (A)	800	2.0	1.0	3.7
2: Mining, quarrying and utilities (B, D and E)	200	0.5	2.0	1.7
3: Manufacturing (C)	3,500	8.5	9.9	10.5
4: Construction (F)	2,500	6.1	5.3	5.6
5: Motor trades (Part G)	500	1.2	1.7	1.8
6: Wholesale (Part G)	600	1.5	2.0	2.2
7: Retail (Part G)	4,000	9.8	9.3	9.0
8: Transport and storage (inc. postal) (H)	2,250	5.5	3.7	3.8

9: Accommodation and food services (I)	4,000	9.8	7.0	8.3
10: Information and communication (J)	600	1.5	2.7	2.0
11: Financial and insurance (K)	450	1.1	3.1	2.2
12: Property (L)	800	2.0	1.8	1.6
13: Professional, scientific and technical (M)	3,000	7.3	6.2	5.4
14: Business administration and support services (N)	2,250	5.5	7.7	7.2
15: Public administration and defence (O)	2,250	5.5	8.3	7.6
16: Education (P)	4,000	9.8	8.8	8.6
17: Health (Q)	8,000	19.5	15.0	15.0
18: Arts, entertainment, recreation and other services (R, S,T and U)	2,000	4.9	4.2	3.9
Total	41,000	100.0	100.0	100.0

Source: BRES, 2021

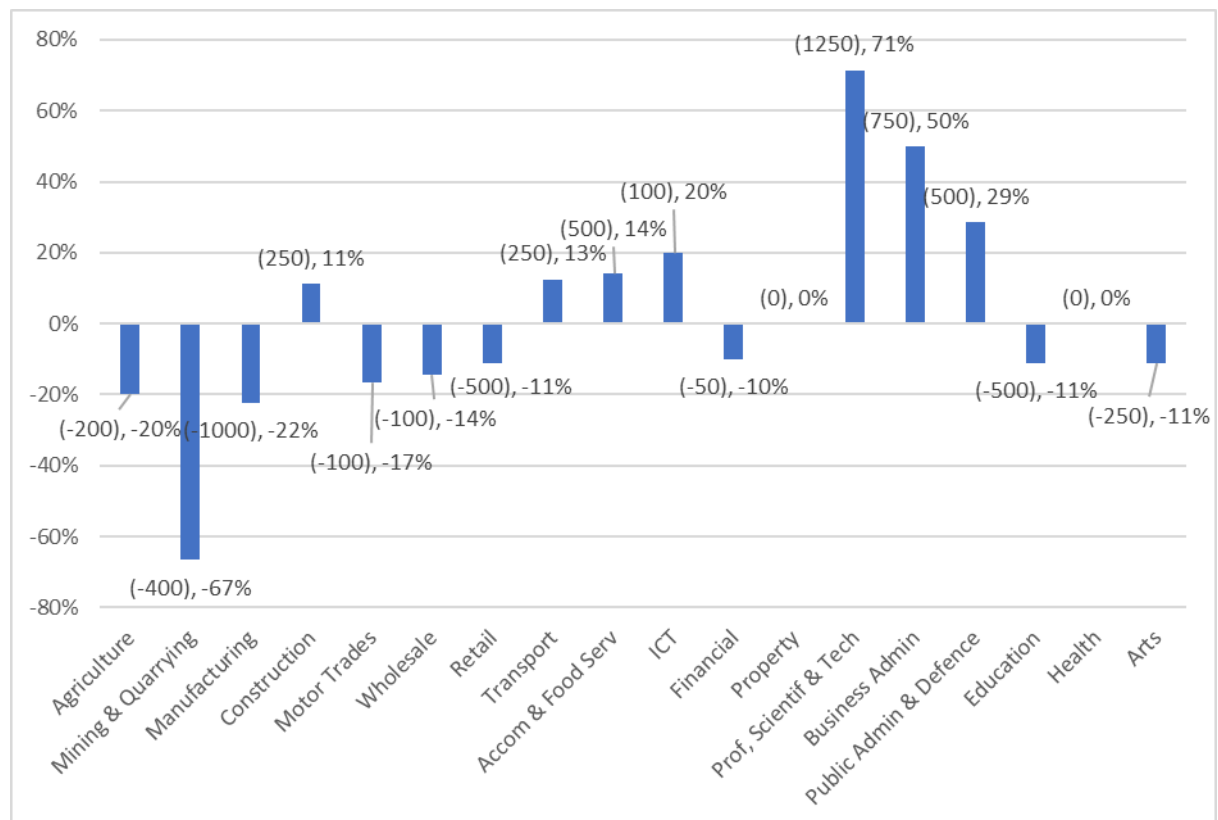
- 3.9 The figures in Table 7 show that the Health sector accounted for the largest number of employees within the Vale of Glamorgan, 8,000 or 19.5 percent of the total number in employment in the Vale (41,000) as of 2020. The Health sector accounted for a higher percentage than the average for Wales and the Cardiff Capital Region (both 15.0 percent), indicating the strength of the sector locally. It is noted that the majority of the jobs within these two sectors are likely based within hospitals/other medical facilities and not in B-class premises.
- 3.10 Retail, Accommodation and food services and Education all employed the second highest number of people, 4,000 each or 9.8 percent of the total each. It is interesting to note that Accommodation and food services, employed equal numbers to Retail, at least in 2020. This shows the local strength of the visitor economy.
- 3.11 Manufacturing was the next largest industry in the Vale of Glamorgan, employing 3,500 or 8.5 percent of the workforce. However, the role of Manufacturing was comparatively weak within the Vale of Glamorgan as proportions of 9.9 percent and 10.5 percent were observed across the Cardiff Capital Region and Wales respectively.
- 3.12 There were also a respectable 2,250 employed in Transportation and 2,500 employed in Construction locally, proportionately above wider averages, particularly for Transportation.

- 3.13 Private sectors which are typically found within offices comprise:
- Information and communication
 - Financial and Insurance
 - Professional, scientific and technical
 - Business Administration and support services.
- 3.14 These sectors accounted for a combined total of 15.4 percent of the Vale of Glamorgan's workforce compared with 16.8 percent for Wales and 19.7 percent across the Cardiff Capital Region. Welsh and Capital Region averages will be skewed by Cardiff however, a long-established national centre for the office economy.
- 3.15 In the Vale of Glamorgan, the Professional, scientific and technical sector dominated with 3,000 (7.3 percent) employed in 2020, higher than the proportion observed in Wales and the Cardiff Capital Region (5.4 and 6.2 percent respectively). Meanwhile, all the remaining office-based sectors accounted for lower proportions of employment than that observed in Wales and the Cardiff Capital Region.

Growth and Decline of Sectors, Employees, 2015-2020

- 3.16 As of 2020 within the Vale of Glamorgan, there were a total of 41,000 jobs split between 18 different sectors, a total that has remained constant since 2015. This, however, does not mean that the number of workers employed in each sector remained the same and consequently Figure 1 breaks down the change in the number of jobs by sector.
- 3.17 The Professional, scientific and technical sector saw the greatest increase in jobs over the period observed, by a large margin, as 1,250 jobs were added (a 71.4 percent increase). The next largest increase in jobs was seen in the Business administration and support services sector where the workforce grew by 750 or 50.0 percent. Consequently, it can be seen that the two fastest growing sectors are both office-based sectors. Growth here does not seem to be linked to the expansion or inward investment of any one large business, but rather reflect a more general expansion of office based employment. While such growth is unlikely to have continued over the period of the Covid-19 Pandemic, the broad strength of the office sector, both in size and growth potential is still shown.

Figure 1 – Change in Employment by Sector, 2015-2020



Source: BRES, 2021

*Number in brackets is number of businesses which were gained/lost

- 3.18 Office sector growth was focused in Professional, scientific and technical and Business administration and support services. By comparison, ICT grew only by 100 workers (20.0 percent) and the Financial and insurance sector saw a loss of 50 workers (-10.0 percent).
- 3.19 Outside of offices, the Construction sector gained 250 jobs, although this represented a modest 11 percent increase over 2015-2020.
- 3.20 Interestingly, the Health sector, which was the largest sector in terms of employment in the Vale of Glamorgan, did not see a change in workers over the period observed. The Property sector was the only other industry where employment levels remained at the same level over the observed period.
- 3.21 Half of the 18 sectors saw a decline in employment between 2015-2020. The largest decrease was seen in the Manufacturing sector where 1,000 jobs were lost, 22.2 percent of the workforce. This is consistent with trends in forecasting which generally

show losses in manufacturing employment both locally and nationally. For example, Oxford Forecasting in the 2013 Employment Land and Premises Study, projected a loss of 400 manufacturing jobs over 2011-2026. The Oxford Forecasting, commissioned for this Study and discussed further in Section 7.0, projects losses of 996 jobs, moving forward over 2021-2036.

3.22 Comparison with the other local authority areas of the Cardiff Capital Region suggests that all bar three lost manufacturing jobs over 2015-2020, with the exceptions being Bridgend, Newport and Torfaen which report no change in manufacturing employment. None gained industrial jobs over the recorded years:

- Blaenau Gwent = 250 less manufacturing jobs over 2015-2020
- Bridgend = No change
- Caerphilly = 500 less manufacturing jobs over 2015-2020
- Cardiff = 1,000 less manufacturing jobs over 2015-2020
- Merthyr Tydfil = 250 less manufacturing jobs over 2015-2020
- Monmouthshire = 250 less manufacturing jobs over 2015-2020
- Newport = No change
- RCT = 1,500 less manufacturing jobs over 2015-2020
- Torfaen = No change.

3.23 Thus, changes in manufacturing employment in the Vale are consistent with wider trends. Again, it is worth noting that the manufacturing sector employs a somewhat lower proportion of the local workforce than wider averages.

3.24 The next largest declines were seen in the Retail and Education sectors where 500 jobs were lost in each industry. This loss in Retail employment was to be expected given the impacts of the Covid-19 Pandemic and resulting Lockdowns on retail trade and footfall in 2020. Indeed, BRES data indicates that half the net loss, 250 jobs did take place between 2019 and 2020.

3.25 The loss of employment in education is more surprising, but factors influencing this are likely include the opening of the main campus for Cardiff and Vale College, in Cardiff, in 2015 and the resulting relocation of staff. Over the time period, at least one rural school has also closed in the Vale.

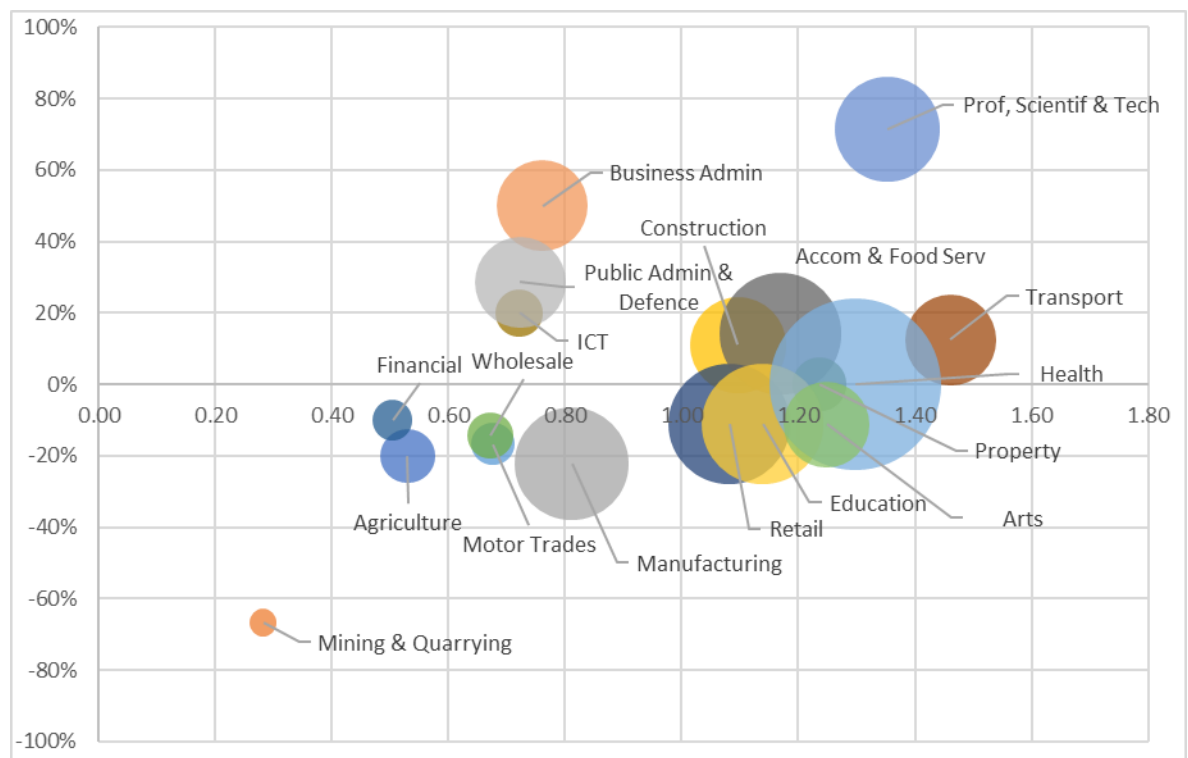
3.26 Proportionately, the biggest reduction, of over two thirds was in Mining and Quarrying, a reduction of 400 jobs. This change cannot be tied to the closure, etc. of

any specific local quarry, but experience suggests that extraction is a volatile industry in terms of local employment and ultimately only accounted for 0.5 percent of total local jobs in 2020.

Location Quotients

3.27 Location Quotients (LQ) are a measure of an area’s specialisms within the local economy. Figure 2 displays these along with both the size of the sector in 2020 (size of the bubble) and its growth through employment numbers over the time period of 2015-2020.

Figure 2 – Location Quotients vs Employment vs Growth, 2015-2020



Source: BE Group analysis of BRES, 2022

3.28 Location Quotients are displayed on the horizontal axis (x axis), describing the proportion of employment within a sector in the Vale of Glamorgan relative to Wales in 2020. It is a measure of an area’s specialisms i.e., if a certain sector is more prevalent in the area than in the country as a whole. A score of 1.00 shows a sector performing at the same level as seen in Wales, as is seen for both the Education and Other sectors. Each sector is also represented by different sized bubbles, which indicates the size of the sector’s employment in 2020.

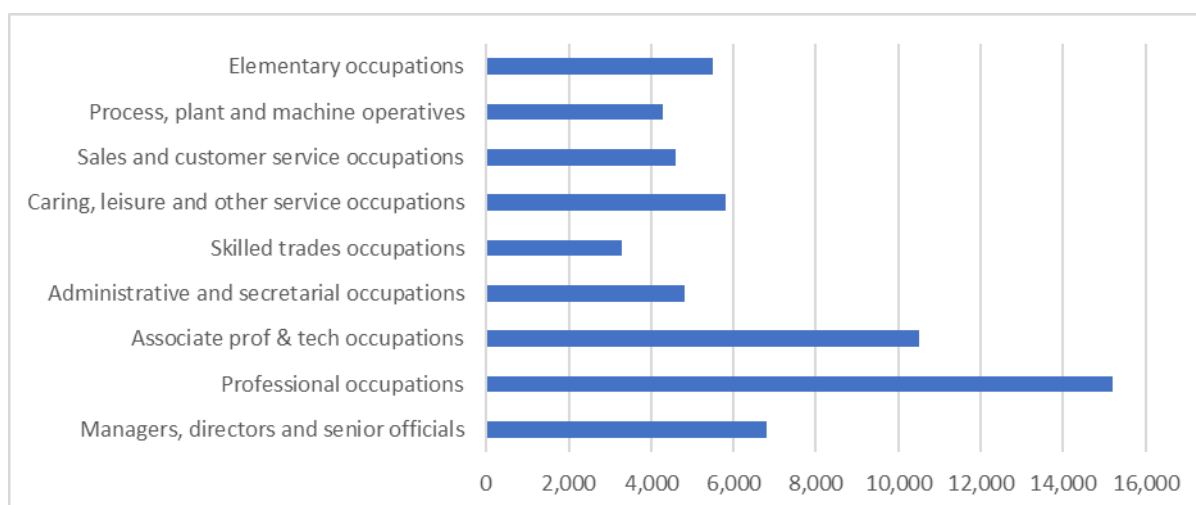
3.29 The sectors situated furthest along the x-axis show the sectors which have a high degree of localised specialisation, compared to Wales. The Transport sector represented a larger proportion of employment than seen in Wales, which was demonstrated by a location quotient of 1.46. The next most specialised sector was the Professional, scientific and technical industry, previously seen to be the fastest growing over the observed period, which had a location quotient of 1.35.

3.30 Conversely, the Mining and quarrying sector in the Vale of Glamorgan represented a share of employment close to four times smaller than seen in Wales, with a location quotient of 0.28. The Financial and Agricultural sectors were the industries with the next lowest location quotients both having a share of employment that was around half that seen in Wales.

Employment by Occupation

3.31 Figure 3 below shows the split of employment by occupation of residents in the Vale of Glamorgan over January 2021 – December 2021. Those in Professional occupations made up a quarter of the workforce, the highest amount in the Vale of Glamorgan. Meanwhile, residents in Associate professional and technical occupations accounted for 17.3 percent of the workforce, the second highest in the Vale of Glamorgan. Aside from Managers, directors and senior officials (11.2 percent), all other occupations have less than a ten percent share of the workforce, with the lowest share being in Skilled trades occupations (5.3 percent). Thus the Vale can be described as having a skilled workforce, focused on the higher value occupations.

Figure 3 – Employment by Occupation, January 2021 - December 2021



Source: Annual Population Survey, 2022

Number and Size of Businesses

- 3.32 ONS data identifies that as of 2021 there were 4,365 VAT registered businesses operating in the Vale of Glamorgan.
- 3.33 89.6 percent of businesses in Wales employed less than ten people (micro businesses), and 98.3 percent of businesses were classified as small (up to 49 employees). The Vale of Glamorgan broadly followed the Welsh national pattern but with a slightly more pronounced proportion of micro firms employing less than ten people and slightly fewer small firms. Table 8 shows that 91.1 percent of businesses in the Vale of Glamorgan employed less than ten people, while all those registered as small businesses totalled 98.7 percent. On the larger side, only five local businesses were identified as having more than 250 employees.

Table 8 – UK Business Counts, 2021

Enterprises	Vale of Glamorgan		Cardiff Capital Region		Wales	
	Number	Percent	Number	Percent	Number	Percent
Micro (0-9)	3,975	91.1	39,180	88.8	95,995	89.6
Small (10-49)	330	7.6	3,995	9.1	9,305	8.7
Medium (50-249)	50	1.1	755	1.7	1,470	1.4
Large (250+)	5	0.1	175	0.4	315	0.3
Total	4,365	100	44,110	100	107,085	100

Source: ONS, 2021

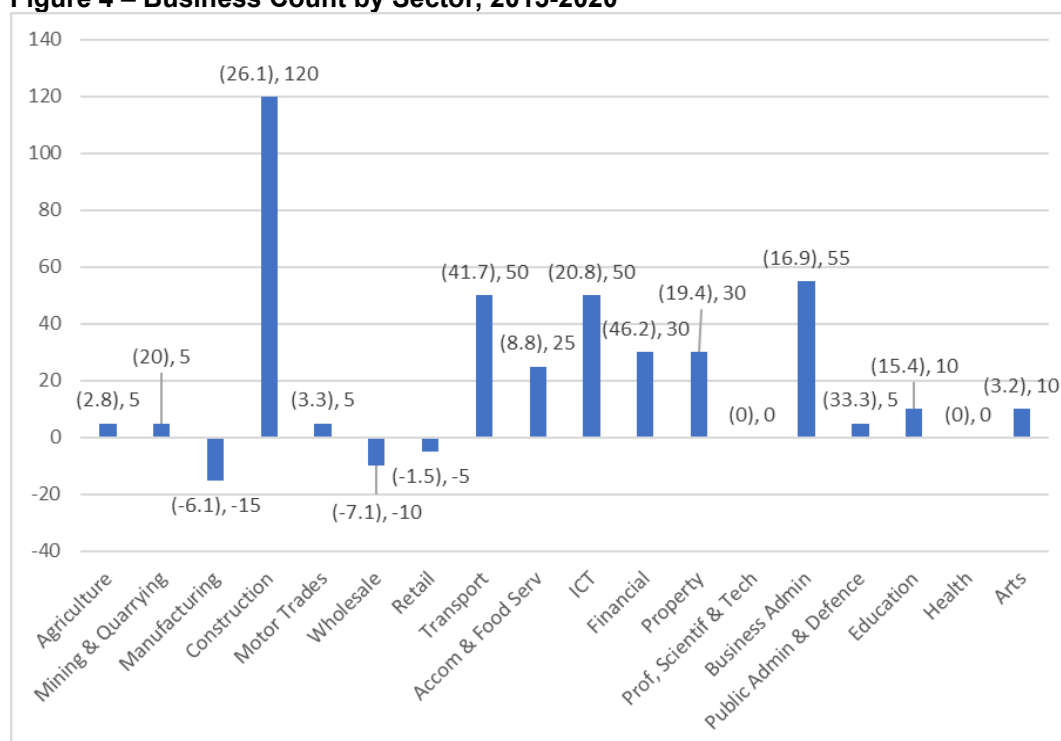
Business Change by Sector

- 3.34 The Vale of Glamorgan was home to 4,365 businesses in 2021. Within these, the four office sectors dominated, accounting for a third of all active business or 1,435 firms. 47.7 percent of these, 670, were in the Professional sector. As noted above, this sector also employed large numbers in the Vale, illustrating its local strength. In comparison, there were a modest 95 Financial businesses locally, only 2 percent of local firms. With 6,300 registered employees in office sectors in 2020, and 1,435 businesses, this would give an average of four employees per business and indicates that companies within this sector are micro sized.

3.35 There were 230 manufacturing businesses and 130 Construction businesses, in the Vale, in 2021 again mostly micro-small firms. There were also 170 Transportation businesses locally.

3.36 In the Vale of Glamorgan, the total number of registered businesses increased from 4,000 to 4,365 over 2015-2020 (see Figure 4). Most notably, 120 new businesses were registered in the Construction sector, the largest absolute growth in any sector and a proportionate increase of over a quarter on 2015. With a related gain of 250 jobs, this sector has clearly performed well in recent years and comparing the jobs gain to business growth suggests that it has gained a lot of micro firms since 2015.

Figure 4 – Business Count by Sector, 2015-2020



Source: Business Counts, 2021

*Number in brackets is number of businesses which were gained/lost

3.37 The Transport sector saw 50 new businesses recorded, expansion of 41.7 percent over the period observed. Transportation grew both in terms of jobs (250) and businesses and looks to be a strong, expanding sector in the Vale of Glamorgan.

3.38 Only three of the 18 sectors saw a decline in the number of businesses over 2015-2020 – these included the Wholesale, Retail and Manufacturing sectors. The Manufacturing sector saw the largest absolute decline, losing 15 businesses or 6.1 percent of the total. Alongside a recorded reduction of 1,000 jobs in recent years, as

noted above, local Manufacturing does seem to have experienced some decline locally since 2015.

- 3.39 The office-based sectors saw a combined net increase of businesses by 135, with the largest growth occurring in the ICT and Business administration sectors, increasing by 55 and 50 businesses respectively. This combined with a growth in jobs of 2,050 over the same period indicates that the office-based sectors have performed strongly in the Vale of Glamorgan at least pre the Covid-19 Pandemic.
- 3.40 The Financial sector saw the highest proportionate gain in business numbers, 46.2 percent or 30 firms. However, both the total number employed in the sector, and the total number of businesses remains modest at 450 employed (reduced by 50 on 2015) and 95 companies.
- 3.41 The Professional, scientific and technical sector was the only office-based sector which did not see a growth in the number of businesses. This is despite the fact that it was the fastest growing industry in terms of jobs added, growing by 71.4 percent or by 1,250 jobs. This suggest that the vast majority of this jobs growth comprised the expansion of existing firms.

Commuting Patterns

- 3.42 The latest data available for statistics on commuting in Wales are from 2021 (see Table 9). The 2021 data shows that 55.9 percent of the Vale of Glamorgan's resident population was also employed in the area. This is a low rate of retention, but not exceptionally so given the Vale's position on the western edge of Cardiff. Indeed, it is broadly similar to rates in other local authority areas which neighbour the City, such as Caerphilly, Blaenau Gwent and Torfaen.
- 3.43 The main worker destinations of the Vale of Glamorgan's residents were Cardiff (18,000 workers) and Bridgend (2,900 workers) while a further 2,800 commuted to places elsewhere the Cardiff Capital Region. However, the dataset did not have sufficient information to provide a hard estimate for each town. A further 1,600 workers commuted to elsewhere in Wales while there was insufficient information to provide an estimate of those commuting to areas outside of Wales.

Table 9 – Commuting, 2021

Area	Out-Commuters (No.)	In-Commuters (No.)	Live and Work in Area (No.)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Bridgend	16,300	16,000	48,900	75.1
Vale of Glamorgan	26,800	8,100	34,000	55.9
Cardiff	34,300	75,500	157,400	82.1
RCT	43,100	14,000	65,500	60.3
Caerphilly	36,100	17,800	44,200	55.0
Blaenau Gwent	14,100	6,000	16,500	54.1
Torfaen	18,000	17,600	21,300	54.2
Monmouthshire	17,100	14,300	27,100	61.2
Newport	27,400	34,100	42,000	60.4
Merthyr Tydfil	9,900	8,700	16,500	62.3

Source: Welsh Government, 2021

- 3.44 In terms of in-commuting, the only town with sufficient data to provide a hard estimate was Bridgend where 1,800 workers commuted from in order to work in the Vale of Glamorgan. A further 6,000 workers commuted from elsewhere in the Cardiff Capital Region to work in the Vale of Glamorgan while approximately 400 workers commuted from outside the Capital Region to work in the Vale of Glamorgan.
- 3.45 Table 10 shows the percentage change in commuting statistics observed between 2019-2021. 2019 data has been used to reflect pre-pandemic levels of commuting as the 2020 data does not reflect standard commuting patterns, with workers being forced to work from home during the Lockdowns. 2021 saw less restrictions than 2020 yet it still saw a Lockdown and restrictions imposed and so this data cannot yet be considered a reflection of the 'new normal'. However, a comparison between 2019 and 2021 data can still be enlightening as to the Pandemic's effect on commuting.
- 3.46 First of all, it can be seen that the percentage of people living and working in the same area, as a proportion of total employed, has risen in all areas but Cardiff and more nominally Newport. This is to be expected with the Covid-19 Pandemic encouraging growth in working from home habits and firms being forced to adopt remote working capabilities.
- 3.47 In all areas bar Cardiff, there were sizable reductions in out-commuting, with Bridgend seeing the most notable reduction. Change in in-commuting is more varied, but the Vale saw a sizable reduction on 2019 of nearly a quarter.

Table 10 – Percentage Change in Commuting Numbers, 2019-2021

Area	Out-Commuters (%)	In-Commuters (%)	Live and Work in Area (%)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Bridgend	-28.2	1.9	12.4	9.4
Vale of Glamorgan	-15.2	-24.3	13.3	7.2
Cardiff	8.2	-23.4	-2.7	-1.5
Rhondda Cynon Taf	-13.6	-24.7	23.1	8.8
Caerphilly	-11.1	-2.2	10.0	5.2
Blaenau Gwent	-15.6	22.4	24.1	9.8
Torfaen	-7.7	24.8	0.0	2.0
Monmouthshire	-3.4	-24.3	1.5	0.9
Newport	-1.8	-3.4	-1.9	-0.1
Merthyr Tydfil	-16.1	-17.9	13.0	7.0

Source: Welsh Government, 2021

Earnings

- 3.48 Table 11 shows that the earnings of the residents in the Vale of Glamorgan, when measured by place of work, was the second lowest in the Cardiff Capital Region (£499.40), behind Bridgend (£464.10). Weekly pay by place of work in the Vale of Glamorgan were significantly less than the Welsh median.

Table 11 – Average Weekly Earnings, 2021

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Blaenau Gwent	518.1	523.3
Bridgend	464.1	577.7
Caerphilly	503.4	562.7
Cardiff	551.4	574.9
Merthyr Tydfil	534.0	525.1
Monmouthshire	574.9	688.8
Newport	550.1	573.2
RCT	521.2	560.3
Torfaen	572.7	547.7
Vale of Glamorgan	499.4	593.3
Wales	537.8	570.6

Source: Annual Survey of Hours and Earnings, 2021

- 3.49 When measuring the gross median weekly pay by place of residence, the Vale of Glamorgan's median of £593.30 was the second highest, behind Monmouthshire

(£688.80). This indicates that there is a large disparity between the wages workers can earn in the Vale of Glamorgan and what can be earned elsewhere.

Summary

- 3.50 As of 2020, the Vale of Glamorgan had a population of 135,295, with 60.3 percent of working age, average within the Cardiff Capital Region. The Welsh Indices of Multiple Deprivation ranks three of the Vale of Glamorgan's 79 LSOAs in the top ten percent most deprived in Wales. This equates to 3.8 percent of the Vale of Glamorgan's LSOAs being in the most deprived ten percent of the country, suggesting the prevalence of extreme deprivation is quite low. A high proportion of the workforce is in professional and associate professional occupations.
- 3.51 BRES data from 2020 shows the Health sector accounted for the largest number of employees within the Vale of Glamorgan, 8,000 or 19.5 percent of the total number in employment. This figure was significantly higher than the equivalent in Wales.
- 3.52 Manufacturing was the next largest industry in the Vale of Glamorgan, employing 3,500 or 8.5 percent of the workforce. However, the role of Manufacturing was comparatively weak within the Vale of Glamorgan as proportions of 9.9 percent and 10.5 percent were observed across the Cardiff Capital Region and Wales respectively.
- 3.53 There were also a respectable 2,250 employed in Transportation and 2,500 employed in Construction locally, proportionately above wider averages, particularly for Transportation.
- 3.54 Private office sectors accounted for a combined total of 15.4 percent, or 6,300 employees in the Vale, compared with 16.8 percent for Wales. Welsh averages will be skewed by Cardiff however, a long-established centre for the office economy.
- 3.55 From 2015-2020, the total number of jobs within the Vale of Glamorgan has stayed constant at 41,000. What growth which did occur, however, was focused in private office sectors. The Professional, scientific and technical sector saw the greatest increase in jobs over the period observed as 1,250 jobs were added, a 71.4 percent increase. The next largest increase in jobs was seen in the Business administration and support services sector where the workforce grew by 750 or 50.0 percent. This

growth combined with a small gain of 100 workers in the ICT sector, contributed to an overall strong growth in office-based sector employment of 48 percent.

- 3.56 Half of the 18 sectors saw a decline in employment between 2015-2020. The largest decrease was seen in the Manufacturing sector which saw a 1,000 job reduction, 22.2 percent of the 2015 workforce. This is in line with trends elsewhere in England and Wales, where the size of the Manufacturing sector has generally been shrinking.
- 3.57 4,365 businesses were registered in the Vale of Glamorgan as of 2020, with 89.6 percent employing less than 10 people, and 98.3 percent classified as small (up to 49 employees). Only five businesses were identified as having more than 250 employees.
- 3.58 In the Vale of Glamorgan, total business count reached 4,365 in 2020, a growth of 365 since 2015. Comparing jobs and business growth suggest the following trends:
- Construction and Transportation enjoyed good growth in both jobs and number of businesses since 2015
 - The Manufacturing sector saw the largest absolute decline in businesses, losing 15 businesses or 6.1 percent of the total. Alongside a recorded reduction of 1,000 jobs, local Manufacturing does seem to have experienced some decline locally since 2015.
 - Office-based sectors performed strongly in the Vale of Glamorgan at least pre the Covid-19 Pandemic, with a gain of 135 businesses, mostly in the ICT and Business administration sectors, and 2,050 jobs.
- 3.59 The 2021 data shows that 55.9 percent of the Vale of Glamorgan's resident population was also employed in the area. This is a low rate of retention, but not exceptionally so given the Vale's position on the western edge of Cardiff. Indeed, it is broadly similar to rates in other local authority areas which neighbour the City, such as Caerphilly, Blaenau Gwent and Torfaen. Cardiff and Bridgend were the main commuter destinations from the Vale although both in an out commuting were substantially reduced, in 2021 data at least, on pre Covid-19 levels.
- 3.60 Median earnings of the residents in the Vale of Glamorgan, when measured by place of work, was the second lowest in the Cardiff Capital Region (£499.40), behind Bridgend (£464.10). When measuring the gross median weekly pay by place of residence, the Vale of Glamorgan's median of £593.30 was the second highest, behind Monmouthshire (£688.80). This indicates that there is a large disparity

between the wages workers can earn in the Vale of Glamorgan to what can be earned elsewhere.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This Section provides an overview of the commercial property market for the Vale of Glamorgan to inform the Employment Land Review and future demand for employment space. It first provides some brief comments on the economic context and market drivers, with points on the Welsh/Sub-regional markets which will impact on the local demand for land and premises. The local market is assessed through a quantitative review of the local supply of vacant premises alongside up to date market intelligence derived from consultations with a range of public sector stakeholders, businesses, developers, scheme managers and property agents, and past transactions.

Economic Context

- 4.2 The national economy has been through a series of tumultuous changes in recent years. First there were signs of recovery from the global financial crisis of 2008 before commercial confidence was unsettled again following the decision to leave the EU in 2016. Although a trade deal was finalised between the EU and UK by December 2020, the global economy was again in crises due to the impact of the Covid-19 Pandemic.
- 4.3 Whilst there were still challenging times for certain sectors of the economy such as hospitality and retail, the wider economy appeared to bounce back relatively quickly from the Covid Lockdowns.
- 4.4 More recently, however, we have faced a global energy crisis exacerbated by the war in Ukraine since February 2022 and other inflationary pressures. The Consumer Price Index of inflation rose 9 percent in the twelve months to April 2022, up from 7 percent in March and the Bank of England expect it to reach 10 percent later this year before contracting in 2023 and potentially returning to a more normal 2 percent level in by 2024/2025.
- 4.5 Normally, inflation is an indication of expanding consumer spending but the economic picture at present is more to do with global energy constraints and exacerbated price shocks. In turn, this puts pressure on all sectors of production and eventually has to filter into retail price increases. Meanwhile, discretionary consumer spending is under pressure as increasing proportion of household incomes are taken by essential items

including housing, energy and transport costs. The Bank of England also increased interest rates to 1.25 percent in June 2022 – the highest level in thirteen years.

- 4.6 As a result of these pressures, UK economic output is contracting, down 0.3 percent in April after a decline of 0.1 percent in March 2022. The Office of Budget Responsibility, however, envisage economic growth to recover from 2024 with an anticipated stabilising of global energy costs.
- 4.7 Whilst some of the current contraction can be linked to dramatic changes following Covid-19, the UK labour market is also in mini-crisis and potentially affecting output capacity. Unemployment remains at record low levels at just 3 percent in Wales compared with nearly 4 percent for the UK overall and over a million job vacancies have been reported across the UK, over 60 percent higher than pre-pandemic levels. Almost all sectors report labour shortages, with particular impacts on logistics and manufacturing.

Property Market Context – UK and Welsh Trends

- 4.8 Whilst the immediate economic conditions remain of concern, the UK commercial property market has generally re-set to the new norms in post pandemic context. Demand for industrial and logistics property continues to break pre-2020 take-up records and the revolution in the office sector towards flexible co-working space has resumed. In comparison the challenges for retail and leisure property remain unabated especially with potential squeeze on consumer spending, with the UK's high street properties seeing high vacancy rates compared to its industrial estates and office schemes.
- 4.9 According to research by specialist agents Lambert Smith Hampton, industrial and logistics property take-up jumped to over in 2021, 29 percent higher than the previous record set in 2020 and almost 50 percent above the typical five-year average rate of demand. Much of the demand is driven by the continuing switch to on-line retail with the sector taking 42 percent of all space let or sold in 2021. Within this Amazon, as in 2020, stood out as the most active occupier of new floorspace, taking 12.5 million sqft (1.2 million sqm) in 32 deals across the UK, including at Celtic Business Park in Newport.
- 4.10 Take up of large scale B2/B8 units in Wales has been held up by a lack of supply compared to most English regions and there is still a relative lack of investment in speculative advanced property development. Total take-up in 2021, in Wales,

reached 3.1 million sqft (288,000 sqm) including the 1 million sqft (93,000 sqm) data centre occupation of the former Quinn Radiators Unit at Imperial Park, Newport.

- 4.11 In terms of the UK Office Market, this clearly stalled during the early stages of the Covid Pandemic with the switch to homeworking and subsequent strategy for hybrid solutions allowing people to reduce reliance on regular commuting. Indeed, the Welsh Government's new ambition is to encourage 30 percent homeworking across Wales to help preserve some of the sustainability benefits seen during the Pandemic with reduced travel to work patterns.
- 4.12 Large corporations have as a result reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market. Whilst the core cities across the UK have seen some improvement in demand, generally office take-up is still some 10 percent below the previous 10-year average.
- 4.13 Cardiff, of course, dominates the Wales office market but take-up was under 30,000 sqm in 2021, 20 percent down in 2021 against an already below average level from 2020. Some big occupiers such as Admiral continue to release space on the market. However, investors continue to show faith that evolving demands for office space do not translate into no demand for office space. New development continues to push on with L&G completing Central Square and JR Smart advancing further plans for mixed-use development at Brains Brewery site on the back of their continued success in the City.

Property Transactions

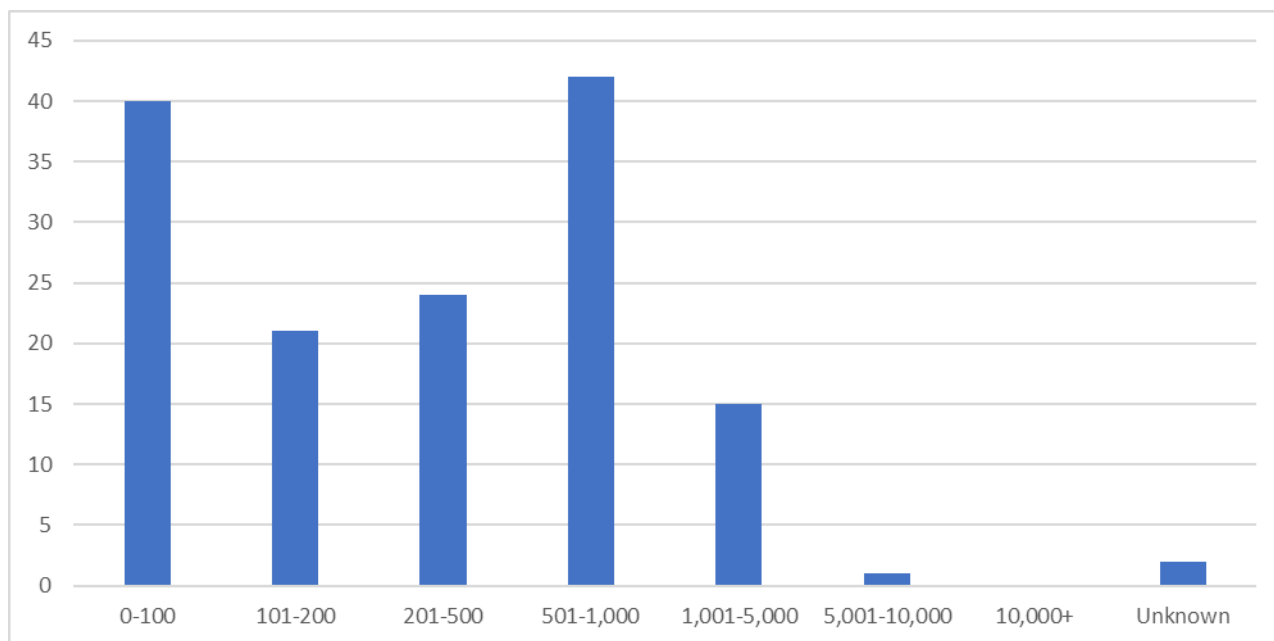
- 4.14 Transactional information has been sourced from Radius Data Exchange property database for industrial/warehouse units and offices, which have been sold or let in the Vale of Glamorgan in the last decade. Transactional data provides evidence of trends, popular locations, along with prime rents which have been achieved in the area.

Industrial/Warehouse Transactions

- 4.15 Over the last decade, 145 industrial deals have been recorded in the Vale of Glamorgan, within which a total of 83,950 sqm of floorspace has been transacted. A breakdown by size band can be seen in Figure 5 below, whilst a full breakdown by size band and year can be found in Table 12. On average over the last ten years, 15 deals were completed each year with around 8,395 sqm/year taken up.

4.16 Properties of 501-1,000 sqm were most frequently transacted, accounting for 29.0 percent of the total during the timeframe, 42 deals. This was closely followed by the 0-100 sqm size band which accounted for just over a quarter of deals (40), indicating the Vale of Glamorgan’s industrial market is focused on small-mid sized units. There was only one unit transacted of more than 5,000 sqm in the timeframe.

Figure 5 – Industrial Transactions by Size, 2012-2022



Source: Radius Data Exchange, 2022

4.17 2014 saw the highest number of deals occur within a single year, 19, 13.1 percent of the total for the decade. 2016 was the year in which the largest amount of floorspace was transacted during a single year of 16,334 sqm. This was largely as a result of five deals occurring for premises of 1,001-5,000 sqm in, and around, Barry.

4.18 The Vale of Glamorgan saw its highest transaction rates in terms of floorspace in the years of 2016 and 2017 after which the levels of floorspace transacted per year returned to the levels previously seen in the decade. There was, however, another surge in the amount of floorspace transacted in 2021 almost to the levels seen in 2016 and 2017. 2021 saw good market activity both for smaller 101-200 sqm units and mid-sized floorspace of 1,001-5,000 sqm, with deals focused in Llandough Trading Estate and at Atlantic Trading Estate, Barry.

4.19 Meanwhile, the number of deals occurring stayed relatively steady throughout the decade, always remaining between 10-20 deals per year.

Table 12 – Industrial Transactions by Size and Year, 2012-2022

Industrial		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2022	Floorspace (sqm)	~	~	255	~	~	~	~	0	255
	Total Properties	~	~	1	~	~	~	~	0	1
2021	Floorspace (sqm)	~	871	289	1,837	9,282	~	~	0	12,280
	Total Properties	~	6	1	3	3	~	~	0	13
2020	Floorspace (sqm)	68	367	541	3,244	~	~	~	0	4,220
	Total Properties	2	2	2	5	~	~	~	0	11
2019	Floorspace (sqm)	226	318	1,501	4,455	~	~	~	0	6,499
	Total Properties	3	2	4	6	~	~	~	0	15
2018	Floorspace (sqm)	446	~	473	1,242	~	~	~	0	2,161
	Total Properties	6	~	2	2	~	~	~	0	10
2017	Floorspace (sqm)	238	456	395	2,549	4,801	6,415	~	0	14,854
	Total Properties	4	3	1	4	3	1	~	0	16
2016	Floorspace (sqm)	123	194	290	2,858	12,869	~	~	0	16,334
	Total Properties	3	1	1	5	5	~	~	2	17
2015	Floorspace (sqm)	130	~	1,542	2,497	4,051	~	~	0	8,220
	Total Properties	2	~	4	3	1	~	~	0	10
2014	Floorspace (sqm)	504	636	1,425	1,445	~	~	~	0	4,009
	Total Properties	9	4	4	2	~	~	~	0	19
2013	Floorspace (sqm)	467	346	699	2,199	2,000	~	~	0	5,712
	Total Properties	8	3	2	3	1	~	~	0	17
2012	Floorspace (sqm)	158	~	768	6,168	2,312	~	~	0	9,406
	Total Properties	3	~	2	9	2	~	~	0	16
Total	Floorspace (sqm)	2,360	3,188	8,178	28,494	35,315	6,415	0	0	83,950
	Total Properties	40	21	24	42	15	1	0	2	145

Source: Radius Data Exchange, 2022

Rents

- 4.20 All of the Vale of Glamorgan's industrial transactions were leasehold. 119 of these transactions stated the level of rent achieved with the average rent being £6.18/sqft (£66/sqm). The highest rent achieved was £28.32/sqft (£63/sqm) which came in 2020 when a 502 sqm industrial unit was rented on Llandough Trading Estate to Cardiff Pottery Workshop.
- 4.21 An assessment of the quality of the premises let, can be undertaken based on the following assumptions:
- <£2.50/ sqft (£27.00/ sqm) – Poor Quality
 - £2.50-5.00/ sqft (£27.00-54.00/ sqm) – Average Quality
 - > £5.00/sqft (£54.00/ sqm) – Good Quality.
- 4.22 The majority of units let, 73, were let for over £5.00/sqft, meaning 61.3 percent of lettings which stated an achieved rental figure were of good quality. Additionally, combined with units of an average quality, these two categories account for 94.1 percent of lettings. Seven lettings were deemed to be of poor quality, focused mostly around Barry/Barry Docks. This suggests recent market activity and demand has been focused on good quality units and limited take up of budget quality space, at least according to open market lettings.

Sales

- 4.23 There was not a single industrial property recorded as sold in the last decade, suggesting a very limited freehold market but also a lack of available freehold space.

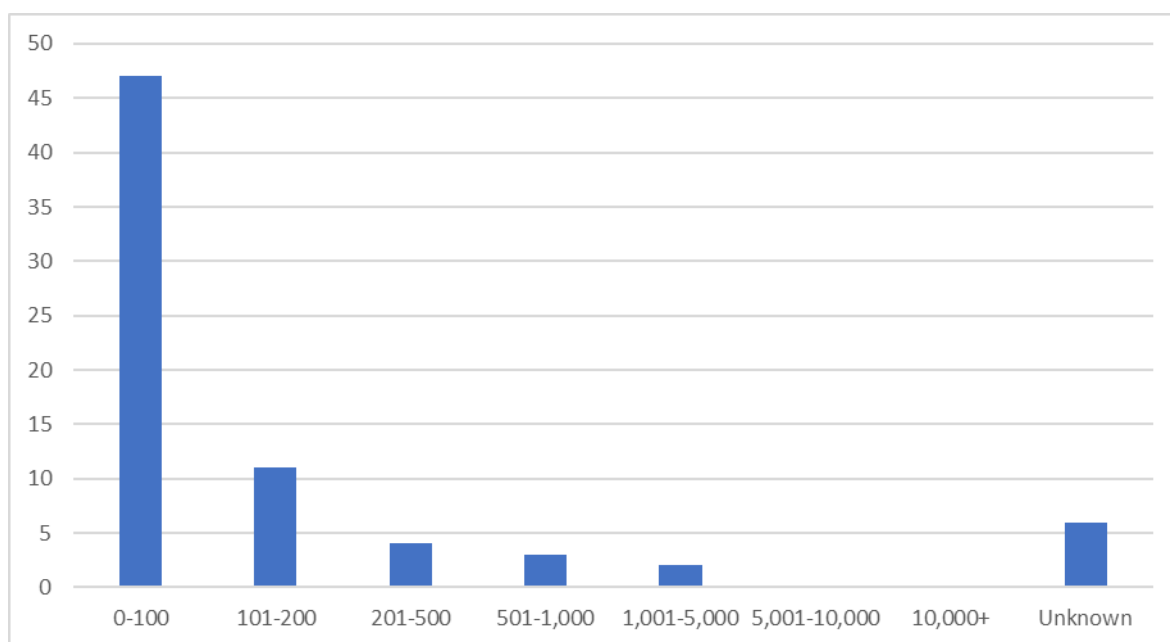
Investment Sales

- 4.24 13 investment sales have been recorded over the last ten years, with only six stating size information. Almost half of investment sales took place in 2018. Meanwhile, 2016 saw the largest recorded floorspace within a single transaction when the 37,200 sqm Aston Martin Facility at Bro Tathan was purchased by Legal and General Investment Management for £51.51 million (£129/sqft or £1,384/sqm).

Office Transactions

- 4.25 Within the last decade in the Vale of Glamorgan, 73 office deals have transacted totalling 10,456 sqm of office floorspace. This equates to an average of seven deals being completed each year or 1,046 sqm/year.
- 4.26 Figure 6 shows a breakdown by size band, meanwhile Table 13 breaks down the decade's transactions by size and year. Office units of a small size were most popular with units under 100 sqm accounting for nearly two thirds of all transactions. The next most popular size band was 201-500 sqm where 15.7 percent of all transactions occurred while there was not a single transaction of an office unit over 5,000 sqm in size. Only two lettings of more than 1,000 sqm were recorded, two separate lettings of the same property Provincial House, Kendrick Road, Barry (albeit with differing property size estimates on each occasion).

Figure 6 – Office Transactions by Size, 2012-2022



Source: Radius Data Exchange, 2022

- 4.27 2014 saw 13 office transactions, the most in the observed period, as well as 2,650 sqm of floorspace transacted, also the record for the decade. This was closely followed by 12 deals in 2018 and 11 deals in 2017. Since 2018, however, only 15 office transactions have occurred in the Vale of Glamorgan, while the total floorspace transacted over 2019-2022 1,571 sqm is considerably smaller than the 2018 figure of 2,499 sqm. Local office market performance was not noticeably worse in 2020 and 2021, than was the case in 2019. Thus, the Covid-19 Pandemic, and associated

Lockdowns did not significantly impact on the local office market rather, with only a couple of exceptional years, it has always been modest in the Vale.

Table 13 – Office Transactions by Size and Year, 2012-2022

Industrial		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2022	Floorspace (sqm)	~	~	~	~	~	~	~	0	0
	Total Properties	~	~	~	~	~	~	~	0	0
2021	Floorspace (sqm)	95	266	212	~	~	~	~	0	574
	Total Properties	1	2	1	~	~	~	~	0	4
2020	Floorspace (sqm)	445	~	~	~	~	~	~	0	445
	Total Properties	5	~	~	~	~	~	~	0	5
2019	Floorspace (sqm)	24	120	409	~	~	~	~	0	553
	Total Properties	2	1	2	~	~	~	~	1	6
2018	Floorspace (sqm)	267	624	~	~	1,609	~	~	0	2,499
	Total Properties	7	4	~	~	1	~	~	0	12
2017	Floorspace (sqm)	401	154	~	889	~	~	~	0	1,444
	Total Properties	7	1	~	1	~	~	~	2	11
2016	Floorspace (sqm)	327	~	~	~	~	~	~	0	327
	Total Properties	4	~	~	~	~	~	~	0	4
2015	Floorspace (sqm)	198	166	~	~	~	~	~	0	364
	Total Properties	4	1	~	~	~	~	~	1	6
2014	Floorspace (sqm)	423	274	~	907	1,046	~	~	0	2,650
	Total Properties	8	2	~	1	1	~	~	1	13
2013	Floorspace (sqm)	558	~	~	~	~	~	~	0	558
	Total Properties	9	~	~	~	~	~	~	1	10
2012	Floorspace (sqm)	~	~	267	777	~	~	~	0	1,044
	Total Properties	~	~	1	1	~	~	~	0	2
Total	Floorspace (sqm)	2,737	1,604	888	2,573	2654	0	0	0	10,456
	Total Properties	47	11	4	3	2	0	0	6	73

Source: Radius Data Exchange, 2022

Rents

- 4.28 Of the 73 office deals to complete in the last ten years, 64 (87.7 percent) were leasehold transactions. The prime rent of the observed period occurred on the High Street of Cowbridge. The office achieved a rent of £78.2/sqft (£840/sqm) in 2013. This was likely due to its small size (17 sqm).
- 4.29 Again, rent can be used as an indicator of the quality of the premises being transacted. In this case the assumptions are:
- <£10.00/ sqft (£107.00/sqm) – Poor Quality
 - £10.00-15.00/ sqft (£107.00-161.00/sqm) – Average Quality
 - > £15.00/sqft (£161.00/sqm) – Good Quality.
- 4.30 The office market in the Vale of Glamorgan was evenly spread in terms of the quality observed. 18 deals achieved rents greater than £15/sqft, 35.3 percent of premises with pricing information and were consequently deemed of good quality. Meanwhile, exactly a third of premises (17) were deemed to be of average quality and 16 premises (31.4 percent) were of poor quality.

Sales

- 4.31 A total of five offices were sold in the Vale of Glamorgan in the last ten years, 6.8 percent of transactions. These deals comprised 1,536 sqm of floorspace, with one deal with no recorded size data. All five deals recorded the sale prices achieved with the average reaching £183,000. The greatest fee of the decade was £358,000 which was paid for a 120 sqm office building (£277/sqft or £2,983/sqm) called Bradenham Place in the centre of Penarth by Technical and Design Engineering Limited.

Investment Sales

- 4.32 Additionally, five investment sales completed over the time frame, the largest being 1, Holton Road, Barry, which was 907 sqm in size and was purchased in 2018. This office was purchased by Hafod Care Association for £350,000 (£35/sqft or £386/sqm) which constituted the greatest fee achieved of the decade.

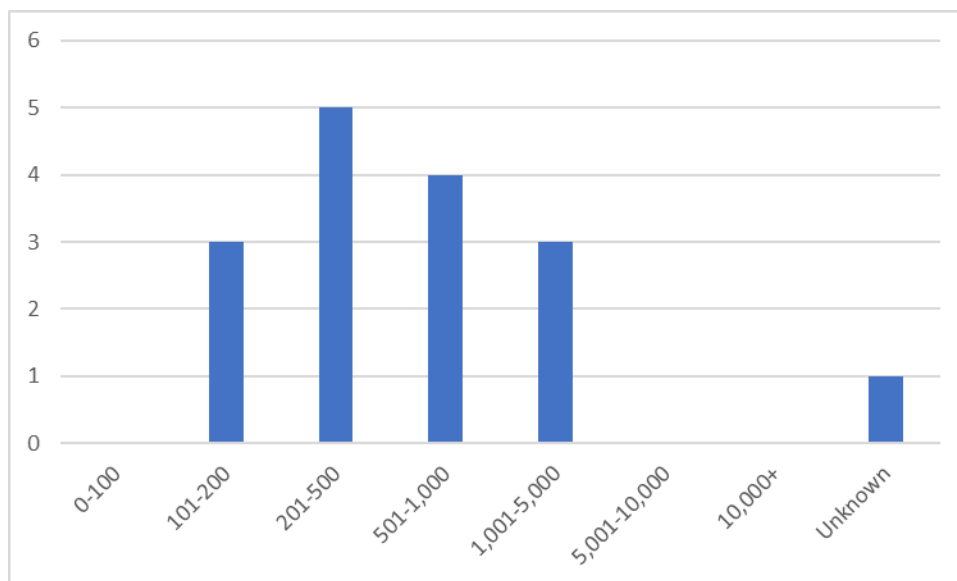
Property Supply

- 4.33 A schedule of vacant floorspace being marketed, as of April 2022, has been compiled from property websites such as EGi Property Link and commercial property agents' websites. This will only represent a portion of the true vacancy rate as there will be floorspace not being marketed yet vacant, including poorer quality floorspace, and space being marketed informally without engaging agents.

Industrial Supply

- 4.34 As of April 2022, within Vale of Glamorgan a total of 12,766 sqm of industrial floorspace was being marketed comprised of 16 individual premises. From property transactions, an average take-up per year has been recorded over the last decade of 8,395 sqm/year, meaning there is 1.5 year's supply of vacant industrial floorspace in the Vale of Glamorgan.
- 4.35 As Figure 7 shows, the supply of marketed properties was varied, with the most vacant property being between 201-500 sqm in size with five units. Next, units in the 501-1,000 sqm size band were most frequently available with four units on the market. This is not in line with the transactions detailed above as the most transacted industrial units were 1,001-5,000 sqm in size. Interestingly, despite the fact that industrial units 0-100 sqm in size accounted for 27.6 percent of all transactions over the past decade, there was not a single unit available on the market at the observed moment in time, suggesting an area of shortage in supply against demand. Additionally, there was also an absence of options in excess of 5,000 sqm, however, transaction evidence suggests that these are only rarely required in the Vale.
- 4.36 All units being marketed were available on a leasehold basis while one unit was available for sale or to let. This indicated a lack of freehold opportunities. Whilst rents are not given for all properties, the property with the highest quoting rent was Unit 1, Stonehouse, Vale Business Park, Llandow which was available for £9.03/sqft (£97.22/sqm) as well as being available on a freehold basis for £175,000.

Figure 7 – Marketed Property, Industrial

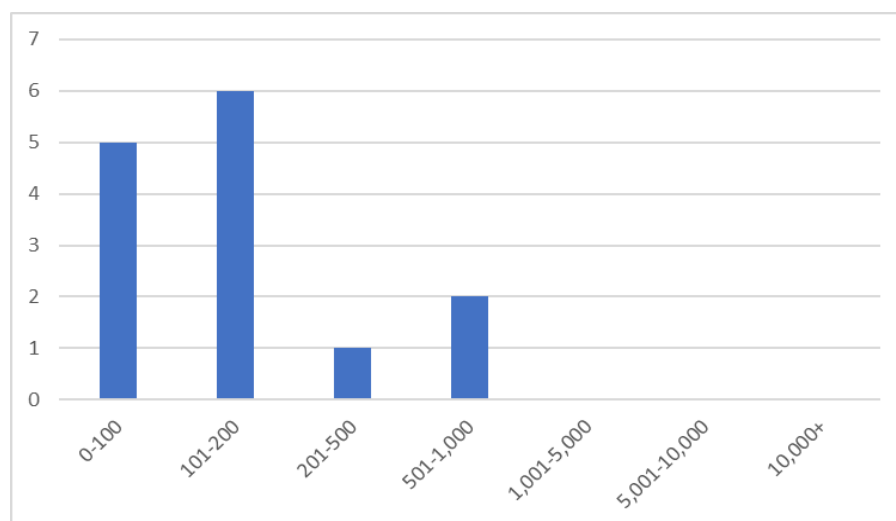


Source: Radius Data Exchange, Various Commercial Agent Websites, 2022

Office Supply

- 4.37 14 vacant offices were being marketed in the Vale of Glamorgan as of April 2022. These vacancies totalled 3,211 sqm. According to property transaction data, an average take-up of office space per year in the Vale of Glamorgan is 1,046 sqm. This equates to just over three years' worth of supply available in the area as of spring 2022. However, the ten year average may not reflect current trends as the Covid-19 Pandemic has altered business requirements for office space, with increasing preference for mixed home and office working.
- 4.38 As Figure 8 shows, the majority of marketed premises were within the smaller size bands, with the greatest number being 101-200 sqm in size, 42.8 percent of the total. Units 0-100 sqm in size were the next most frequently available with five units. All units available were below 1,000 sqm in size which is in line with past transaction trends as 97 percent of transactions were also below this threshold. The fact that there were no large (>1000 sqm) office premises available means businesses with larger requirements, particularly inward investors, will have to look further afield than the Vale of Glamorgan.

Figure 8 – Marketed Property, Office



Source: Radius Data Exchange, Various Commercial Agent Websites, 2022

4.39 Offices to let dominated the market in the Vale of Glamorgan with 13 of the 14 offices being available on this basis. Only one property was available solely on a freehold basis which was the Marine Buildings at Penarth Marina that was 145 sqm in size and available for £2,250,000.

4.40 A 26 sqm office at Vale Business Park, Llandow represented the highest quoting rent within the Vale of Glamorgan, being available for £48.01/sqft (£516/sqm). Meanwhile the largest office available was the Port Office, Atlantic Way, Barry at 930 sqm.

Stakeholder Analysis – Property Market and Public Sector Stakeholders

4.41 The above analysis of the property data pertaining to the Vale of Glamorgan has been supported by consultations with commercial property agents active in the Vale. Stakeholders were asked about activity levels in the Vale of Glamorgan, key market sectors, spatial differences and the key employment nodes. Feedback is summarised below and represents the views of those stakeholders rather than those of the Council or BE Group. Information provided has been combined and anonymised, where required to protect confidentiality.

4.42 In terms of the Vale of Glamorgan, stakeholders identify two or even three distinct spatial markets. The primary market is Barry as the largest town, with major chemical production facilities and the Docks. Much of the rest of the Vale is more rural in character with localised business demand around Llandow Industrial Estate/Vale Business Park. A third emerging area would be around Cardiff Airport and the wider

Enterprise Zone and now being joined by the strategic regeneration of Aberthaw Power Station.

Barry Context

- 4.43 Barry provides a strong local labour market which supports largely B2 industrial business demand with interest ranging for small units of up to 150 sqm and mid-range units up to 2,000 sqm. Although local demand has remained steady in recent years, Barry doesn't feature among the prime occupier enquiries, or the larger logistics market given its separation from the main M4 Motorway corridor.
- 4.44 However, Cardiff is experiencing a shortage of standard industrial land and premises and there is every opportunity for Barry to benefit. Potential will exist for ongoing industrial growth in Barry/Sully around the Docks especially if ABP is prepared to release land for non-port related uses.
- 4.45 Furthermore, as experienced across south Wales, demand is especially strong for small flexible workshop units up to 150 sqm. The recent speculative development of 43 units at Hayes Lane, Atlantic Business Park has proved hugely popular with majority already being sold at around £110/sqft (£1,184/sqm) and let at £8/sqft (£86/sqm) indicating a good all risk initial yield of 7 percent.
- 4.46 The office market in Barry, however, is more poorly developed, being largely in the shadow of nearby Cardiff. Although potential exists for flexible workspace especially if connected to the local rail links.

Rural Vale

- 4.47 There is a positive perception of market demand across the wider rural Vale area, although very different to that of Barry. Demand in the rural Vale is very localised either servicing the market towns of Llantwit and Cowbridge or small local businesses operating as part of the wider regional supply chain. Small business units developed on Lower Greenway Farm off the A48 near Bonvilston have proved very popular and opportunities for similar farm diversification could be encouraged (subject to transport impacts on local areas).
- 4.48 The Vale Business Park at Llandow situated between Llantwit and Cowbridge offers a wide range of good quality business space with a generally high occupancy level. Recent speculative development of two small business units of around 155 sqm were quickly taken with agents reporting strong interest for more space.

- 4.49 The wider Llandow industrial area tends to cater for demand for larger/lower quality industrial and warehouse units in the area although more could be achieved through rationalisation of the site, delivery of higher grade stock and improved site infrastructure given the experience of demand elsewhere. The area is not seen as being attractive to national operators given its more remote location and distance from the main road network.
- 4.50 There is also resurgent interest in a potential agri-hub in the Vale, encouraged by Farmers Union of Wales and following previous research undertaken by the Vale Council in response to the closure of the Cowbridge Livestock Market. The development of a replacement market would be seen to attract other associated rural businesses serving the Vale's farming community.
- 4.51 In terms of local office demand, the market town of Cowbridge is emerging as a popular location for small office suites for local businesses. Most accommodation is provided above the shop units although the conversion of the former Nat West Bank at 4 Westgate and at Junction House, Eastgate both provide a range of small ground floor office suites. Market rents held up well during 2020 and 2021 at £16 - £20/sqft (£172-215/sqm).

Cardiff Airport and Enterprise Zone

- 4.52 There is a potentially new emerging market proposition centred around Cardiff Airport's Gateway Development Zone and the St Athan Aerospace Business Park, both part of the regional Cardiff Airport - Bro Tathan Enterprise Zone designated by Welsh Government. Together, they create a strategic offer to attract specialist aerospace investment capitalising on direct access to private airstrips and a high-quality, mixed business park – something the Vale has lacked in the past – and benefiting from links to the Airport and wider region.
- 4.53 Business interest will be further enhanced by Cardiff and Vale College's plans for a new 9,000 sqm hi-tech advanced manufacturing campus in the vicinity of their established International Centre for Aerospace Training (ICAT).

Market Rents

- 4.54 The market rental tone across the Vale of Glamorgan is highlighted in Table 14 below. For simplicity, the figures are only presented in terms of £/sqft. This is based on current quoting rental values for available property in each area. Rental

differences reflect both the quality of different floorspace and general location/accessibility to the main road network.

Table 14 – Current Market Rents (2022) – £/sqft

	Office	Small Workshop	Standard Industrial	Hi-Tech Space
Barry Market	5 - 8	7 - 8	4 - 5	
Rural Vale	10 - 15	6-7	3-4	
Enterprise Zone/Airport	15 - 18			7-9

Source: PER Consulting Research, 2022

Summary

- 4.55 Industrial and logistics property take up was over 50 percent higher in 2021 than the typical five-year average, topping out at 78 million sqft (7.2 million sqm) across the UK. Take up of large scale B2/B8 units in Wales has been held up by a lack of supply compared to most English regions and there is still a relative lack of investment in speculative advanced property development. However, Wales still saw 3.1 million sqft (288,000 sqm) of industrial and logistics take up in 2021.
- 4.56 In terms of the UK Office Market, this clearly stalled during the early stages of the Covid Pandemic with the switch to homeworking. Large corporations have as a result reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market. Whilst the core cities across the UK have seen some improvement in demand, generally office take-up is still some 10 percent below the previous 10-year average.
- 4.57 Cardiff, of course, dominates the Wales office market but take-up was under 30,000 sqm in 2021, 20 percent down in 2021 against an already below average level from 2020. However, investors continue to show faith that evolving demands for office space do not translate into no demand for office space and new development is progressing in the city.
- 4.58 Over the last ten years 145 industrial deals have been recorded in the Vale of Glamorgan, within which a total of 83,950 sqm of floorspace has been transacted. Properties of 501-1,000 sqm were most frequently transacted, accounting for 29.0 percent of the total during the timeframe.
- 4.59 In 2021, despite the ongoing Covid-19 Pandemic the amount of industrial/warehouse floorspace transacted surged to levels not seen since 2016/2017. 2021 saw good market activity both for smaller 101-200 sqm units and mid-sized floorspace of 1,001-

5,000 sqm, with deals focused in Llandough Trading Estate and at Atlantic Trading Estate, Barry.

- 4.60 All of the recorded industrial transactions recorded over the last decade were leasehold, indicating a limited freehold market locally. The average rent achieved over the decade was £6.18/sqft (£66/sqm). The highest rent achieved was £28.32/sqft (£63/sqm) which came in 2020 when a 502 sqm industrial unit was rented on Llandough Trading Estate to Cardiff Pottery Workshop.
- 4.61 Within the last ten years in the Vale, 73 office deals have transacted totalling 10,456 sqm of office floorspace. Unsurprisingly, units of a small size are most popular, with units under 100 sqm accounting for nearly two thirds of all transactions.
- 4.62 Since 2018 only 15 office transactions have occurred in the Vale of Glamorgan. Local office market performance was not noticeably worse in 2020 and 2021, than was the case in 2019. Thus, the Covid-19 Pandemic, and associated Lockdowns did not significantly impact on the local office market rather, with only a couple of exceptional years, it has always been modest in the Vale.
- 4.63 As of April 2022, within Vale of Glamorgan a total of 12,766 sqm of industrial floorspace was being marketed comprised of 16 individual premises. From property transactions, an average take-up per year has been recorded over the last decade of 8,395 sqm/year, meaning there is 1.5 year's supply of vacant industrial floorspace in the Vale of Glamorgan.
- 4.64 Most vacant property was 201-1,000 sqm in size. This is not in line with the transactions detailed above as the most transacted industrial units were 1,001-5,000 sqm in size. Interestingly, despite the fact that industrial units 0-100 sqm in size accounted for 27.6 percent of all transactions over the past decade, there was not a single unit available on the market at the observed moment in time, suggesting an area of shortage in supply against demand.
- 4.65 14 vacant offices were being marketed in the Vale of Glamorgan as of April 2022. These vacancies totalled 3,211 sqm. According to property transaction data, an average take-up of office space per year in the Vale of Glamorgan is 1,046 sqm. This equates to just over three years' worth of supply available in the area as of spring 2022. However, the ten year average may not reflect current trends as the Covid-19

Pandemic has altered business requirements for office space, with increasing preference for mixed home and office working.

4.66 The majority of marketed premises were within the smaller size bands, with the greatest number being 0-200 sqm in size. All units available were below 1,000 sqm in size which is in line with past transaction trends as 97 percent of transactions were also below this threshold.

4.67 Property market stakeholders identified three property market areas:

- Barry – Strong B2 industrial market for units of 150-2,000 sqm. Demand is primarily local, given Barry’s distance from the M4 Motorway, however, Cardiff is experiencing a shortage of standard industrial land and premises and there is every opportunity for Barry to benefit from this. The office market in Barry is more poorly developed, being largely in the shadow of nearby Cardiff. Although potential exists for flexible workspace especially if connected to the local rail links
- Rural Vale – Demand in the rural Vale is very localised either servicing the market towns of Llantwit and Cowbridge or small local businesses operating as part of the wider regional supply chain. The Vale Business Park at Llandow situated between Llantwit and Cowbridge offers a wide range of good quality business space with a generally high occupancy level. Opportunities for growth exist across the wider Llandow industrial area. In terms of local office demand, the market town of Cowbridge is emerging as a popular location for small office suites for local businesses.
- Cardiff Airport and Enterprise Zone – A strategic offer to attract specialist aerospace investment capitalising on direct access to private airstrips and a high-quality, mixed business park – something the Vale has lacked in the past – and benefiting from links to the Airport and wider region. Business interest will be further enhanced by Cardiff and Vale College’s plans for a new 9,000 sqm hi-tech advanced manufacturing campus in the vicinity of their established ICAT facility.

5.0 STAKEHOLDER CONSULTATIONS

Introduction

- 5.1 This section provides commentary about Vale of Glamorgan, drawn from consultations with the public sector and other stakeholders – primarily the major businesses and landowners. It should be noted that each organisation’s comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture. Discussions with property agents, managers and scheme owners, regarding the general supply and demand for employment land and property in the Vale, are summarised in Section 4.0.
- 5.2 This section also considers the property market in the other local authority areas of the Cardiff Capital Region. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Vale’s land and property market.

Public Sector Engagement

- 5.3 BE Group and Per Consulting have consulted with officers of the Welsh Government, Cardiff Capital Region, Vale of Glamorgan Council and the Farmers Union Wales. The results of those consultations are set out below, by topic and/or geographic area.

Bro Tathan (St Athan) Enterprise Zone

- 5.4 St Athan/Bro Tathan was designated an Enterprise Zone in 2012, along with Cardiff Airport. However, after a decade there are no longer any Enterprise Zone incentives available on the site, rather the attractiveness of Bro Tathan is now due to the critical mass of businesses and infrastructure in place.
- 5.5 Bro Tathan is also not run by an Enterprise Zone advisory board, rather directly by Welsh Government officers reporting to the Welsh Government Property Infrastructure Group.
- 5.6 There are 26 main private businesses on site. Unsurprisingly a lot of these are in engineering/aircraft maintenance sectors, given the on site airfield access and hanger capacity. Since the Covid-19 Pandemic the international aviation market has shrunk, but the internal UK aviation market remains strong and continues to generate

premises requirements.

- 5.7 In addition to aviation, Bro Tathan is now home to a diverse range of businesses in high technology sectors including engineering/technology research (Cardiff University), specialist drone manufacturer, cyber security start-up business and vertical farming within a hanger building.
- 5.8 One advantage of Bro Tathan is the relative affordability of premises. Rental values were not disclosed but are understood to be very low reflecting the fact that the old MOD buildings are only being refurbished to a basic standard before being passed to occupiers.
- 5.9 The whole of Bro Tathan comprises 486 ha, of which 146 ha is developable, net of the airfield, etc. Within that developable area:
- Northern Zone (32 ha) – Now largely full, with the final plot under offer to a confidential party. This final plot comprises 10,000 sqm in four buildings on 8 ha
 - Eastern Zone (48.5 ha or 51.3 ha gross) – This will be the next development area. The MOD will vacate this area in Summer 2023, with the land then transferred to the Welsh Government. The site will then be cleared and serviced, with £30 million of Welsh Government funding allocated for this. The Eastern Zone will be ready for new development by 2025, with various high level discussions underway as to what could go there
 - Western Zone (81 ha gross) - Comprises much of the air infrastructure. Unlikely to see much new development
 - Southern Zone (8 ha) – The 'rotary zone' providing helicopter facilities for the Police and Coastguard. This could provide long term development land but would need considerable infrastructure investment to link it to the rest of the area. Development here is unlikely within the RLDP period to 2036.
- 5.10 There are 1,200 jobs in the Enterprise Zone site, 700 on Aston Martin, with further 1,200 on the remaining MOD facilities. The total jobs will reduce by 420 when the RAF depart the Eastern Zone in 2023 although hopefully that employment will return when the redeveloped Zone is occupied.
- 5.11 Stakeholders highlight that a key weakness of Bro Tathan is its lack of services, shops, hotel, hot food, etc. to support the 1,200 who work in the Enterprise Zone.

Aberthaw Power Station

- 5.12 The Cardiff Capital Region (CCR) exchanged contracts on the purchase of the site from EDF Energy in May 2022, but don't intend to take possession until early 2023, as various environmental consents need to be secured first. CCR are just contracting for a demolition contractor. CCR has some £36 million to invest in site purchase, remediation, and opening up but will need to recoup these costs over the next 20 years.
- 5.13 CCR have received a range of suggestions from business for uses on the site, including for energy production and storage (solar panels and onshore transmission facilities for the Celtic Array offshore wind facility in the Bristol Channel), data centres and giga factories. The 18 million tonnes of Pulverised Fuel Ash which remain on the site are also of market interest, with offers of up to £20 million received for this material.
- 5.14 Ultimately all ideas are indicative only at this point as it could take 6-7 years to ready the site for development. No firm development proposals have been agreed, although a site masterplan has been commissioned for the site to commence later in summer 2022. It is expected that this masterplan will, when completed, be adopted by the Council as Supplementary Planning Guidance. Masterplanning will consider if any investment in the access road network is needed.

Barry Making Waves

- 5.15 The Barry Making Waves Project was first developed in 2014 with Heritage Lottery Fund support. It led to the creation of the Barry Place Board and a number of initiatives within the town, including investments in local heritage and culture, such as the Barry Story Book as well as a 'building social capital' programme creating a community volunteers bank and digital place marketing.
- 5.16 Building on this, public sector partners are, through Levelling Up Funding, proposing several physical projects under the Barry Making Waves programme. Of relevance to this study are plans for 'the Mole', the spit of land extending into the Barry western Dock. Development here is proposed to include 2,900 sqm of Business Incubation space (2,323 sqm net), on 0.26 ha, set within a Linear Park and surrounded by a new Marina, with event and leisure space to the west. The building will be developed to a high standard and offer a range of facilities to help and support local start-up companies and individual entrepreneurs to develop their businesses.

- 5.17 Details of scheme operation have still to be agreed, also any links to further or higher education or focus on specific industrial sectors. The view of the latest research (July 2022), however, was that the *“proposed Centre in Barry should be targeted to accommodate a diverse mix of occupiers with a high value-added quality threshold for acceptance into the scheme.”* Also, *“that resilience is built into the scheme to allow the building to be let in larger blocks of accommodation floor by floor.”*
- 5.18 Rents of £11-13/sqft (£118-140/sqm) on a net rental basis and £22-24/sqft (£239-258/sqm) on an all-inclusive basis i.e., with centre management and all utility costs included, are judged achievable for suites of 20-90 sqm. It will have the opportunity to capitalise on businesses downsizing to smaller accommodation, to reflect new ways of working post the Covid-19 Pandemic. Good demand from the creative, ICT, tech and cyber sectors was reported in research, alongside a very limited supply of available serviced suites in the Vale and across the Cardiff Capital Region more generally.
- 5.19 Finally, a successful scheme here, aimed at start-up businesses, may also build up the market for grow-on accommodation along Ffordd Y Mileniwm.

New Livestock Market/South East Wales Food Park

- 5.20 The 2018 Livestock Market Feasibility Study, and its 2021 Update, identified the need for a multi-function livestock auction centre, to replace the now closed Cowbridge Livestock Market (see Section 2.0). This should include a mini-business centre supporting rural business and food production, with potential to expand into wider rural business park (Agri Hub). Discussions are underway with farmers and potential auctioneers who may wish to occupy this.
- 5.21 A site of 0.4-0.8 ha is needed to support the livestock auction centre, increasing to 1.6 ha to provide space for other businesses to co-locate with the auction centre. The Council has indicated that land may be available to meet this requirement in the Vale, but further details remain confidential at this time.
- 5.22 Stakeholders report that while the facility could generate sufficient revenue to support its day to day operations, there is a shortfall of around £1 million in the capital costs required for its development. Discussions are underway with Farmers Union Wales (a potential project leader), the Cardiff Capital Region and private sector/farmer co-operative investors to fill this funding gap.

- 5.23 Separately, Cardiff Metropolitan University have completed research on behalf of the Welsh Government Food Division, 'Food and Drink Wales', which identified that there is an acute shortage of factory units suitable for food production in South East Wales. As a result, start-ups and expanding companies are struggling to find suitable units.
- 5.24 Food-ready units are in short supply because they are not commercially attractive to private property developers. The cost of construction combined with the relatively low rental return, because of the small margins available in food manufacturing, has resulted in most successful UK food parks being supported by public sector investment.
- 5.25 Reflecting this shortage and the fact that equivalent food parks are being developed in North West Wales, North East Wales and South West Wales, the research proposed a Food Park Development in South East Wales. The concept was for a 1.6 ha site accommodating up to 13 units of 150-800 sqm each, together with a development kitchen and business innovation suite.
- 5.26 To date Food and Drink Wales have been supportive of the project and indicated that funding could be available. This commitment was reiterated in March 2022.
- 5.27 It was originally proposed that this new facility be located on the Rhyd-y-Blew site in Ebbw Vale, Blaenau Gwent, but the funding from the Blaenau Gwent Tech Valleys programme, which might have supported this, has been halved. This means that a new site is being sought for the Food Park, outside of Blaenau Gwent. There is therefore the opportunity to locate both the Food Park and the Agri Hub in Vale of Glamorgan although bio-security would require strong separation between the livestock markets and the food production facilities. They could still sit close together, however, on a site of some 3.2 ha if such a site can be acquired locally at a limited cost.

Business/Landowner Consultations

- 5.28 Select consultations have been undertaken with key businesses and landowners, particularly those with significant growth plans within the Vale. The results of those consultations are set out below, by geographic area.

Renishaw, Land South of Junction 34, M4

- 5.29 Planning consent 2014/00228/EAO proposes, on 55.16 ha of gross land adjacent to

its existing facility:

- A 92,903 sqm B8 warehouse allocation on 18.57 ha
- A 6.64 ha B1/B2 business park
- 1 ha of land for additional road access, to open up the remaining land for development
- Non-B class employment uses are proposed on 1.45 ha (a hotel or residential training centre).

- 5.30 This lapsed in Summer 2021 and Renishaw is working with the Council to renew it.
- 5.31 Renishaw report lots of interest in this land and is in confidential discussions with several parties for delivery. Broadly it is seeing demand from larger logistics operators and for data centres. Delivery also depends on if a Bypass and/or park and ride is delivered close to the site.
- 5.32 The existing Renishaw factory at Junction 34, M4 comprises some 50,000 sqm employing 650 people, engaged in component manufacturing and some Research and Development. Renishaw have Reserved Matters consent for another 50,000 sqm, expected to employ 450-500. Renishaw have indicated that in 2022 it will commence development of 40,000 sqm of additional buildings, consisting of two new production halls and an employee welfare facility. The existing production halls will also be refurbished to reduce Renishaw's greenhouse gas emissions. The construction will be completed in phases, with a 15-month programme of work starting in July 2022 to build the first of the new halls (17,540 sqm), the welfare facility and supporting infrastructure. The basic shell for the second new production hall (18,190 sqm) will be built by December 2024 and will be fully constructed when business levels require its use.
- 5.33 The details of the operations that will take place in each of the new halls is yet to be fully determined, but the additional capacity will allow for increases to machining operations and the assembly of products already built at the site, including Renishaw's metal additive manufacturing (3D printing) machines.

Barry Docks

- 5.34 Barry Docks is owned and operated by Associated British Ports (ABP). ABP is now taking a more active approach to opening up the Docks to investment. It has moved

low value tenants out and demolished poor-quality space to create a 21 ha platform for new development. ABP's agents report that the company would be open to moving the Docks security fence, as has been done in Cardiff, to create areas of open and unsecured land for general development, including for non Port-related employment.

- 5.35 Agents for the Docks report good demand for standard (i.e., non-port use) industrial and warehouse properties of up to 2,000 sqm. Rents are £4/sqft (£43/sqm) on un-refurbished existing premises. Storage land is available at £25,000/acre (£62,000/hectare). ABP is also considering adding a service charge for non-port users, a change from its existing revenue model which focuses on tonnage shipped through the port. The service charge would support maintenance on the site and investment in site security, which is always a concern of tenants.

The Chemicals Complex, Barry

- 5.36 The Barry Chemicals complex extends across some 118 ha. Some 65 ha in the north west of the Complex is owned and occupied by Dow Chemicals. Dow Corning Barry employs some 600 and produces Silicone 'Intermediaries' (half finished products) which are shipped to other Dow Corning facilities, via Barry Docks. On average, one Dow Corning ship a week passes through Barry Docks. Dow Barry also produces finished products (silicone fluids and rubber) for wholesale. Products are shipped from Barry in a variety of forms, including by road tanker, barrel and 1 ton 'batch containers'.
- 5.37 Dow's facility in Barry is relatively low density, with lots of unused land, but Dow intend to retain the whole site for its own use. The vacant land can be used to support new chemical production facilities, allowing the Barry site to diversify over the long term. As differing chemical production processes will require differing distances of separation from each other, Dow needs to keep large areas of land under its control to meet future expansion needs. Dow Corning has been investing in the site and will continue to do so.
- 5.38 Dow shares the Barry Chemical Complex with a number of other chemical companies, although only Cabot CMP (who undertake a number of sub-contracted production tasks) and Vopak (who provide bulk pumping and storage facilities) are linked to Dow.
- 5.39 The south and east of the Chemicals Complex is mostly owned by ABP and Greenhill

Investments, with the bulk of the land let to large occupiers in the chemicals sector including Cabot CMP, Vopak and Hexion Speciality Chemicals. This area includes large areas of vacant land along Hayes Road and Sully Moors Road which regularly come on the market as development opportunities sites. At the time of writing the 19.43 ha Greenhill Investments owned Hayes Road site is on the market, for sale or to let, in three plots. The land is priced at £150,000/acre (£370,000/hectare) and is understood to be attracting good market interest. It should also be noted that much of the east of the Complex is subject to a 99 year lease to developer St Modwen which is likely to be interested in schemes for investment and development here.

Model Farm

- 5.40 Model Farm is an employment proposal for Legal and General owned land in the east of the Land adjacent to Cardiff Airport and south of Port Road, Rhoose. A Hybrid planning application (App. No.2019/00871/OUT) was submitted, in outline, for the demolition of existing buildings and erection of 44.75ha Class B1/B2/B8 Business Park, car parking, landscaping, drainage infrastructure, ecological mitigation and ancillary works and, in full, and a change of use from agricultural land to country park. This proposed the development of B1, B2, B8 premises along the southern side of Port Road and environmental mitigation/country park to the south. An approval of the application was quashed by the High Court in October 2021, following concerns being raised with issues including the publicity of viability evidence. The application remains under review. Agents for Legal and General have confirmed that the investor remains committed to a development here but is taking a long term view about when the scheme might come forward. It still sees strong potential here for a high-quality business cluster reinforced by Cardiff and Vale College's investment nearby. It has stated that there is a development partner for the project.

Community and Town Councils

- 5.41 All the community and town councils in the Vale have been contacted. Community Councillors from neighbouring local authorities have also been contacted by email. Two responses were received, Llandough Community Council made the following points:
- *“Llandough is situated close to Penarth and Cardiff and in these areas there are many opportunities for local people to seek employment and acquire premises for establishing a business.*

- *Llandough Hospital is located in the community of Llandough and is a major regional employer having regard to the fact that it is one of the largest hospitals in Wales.*
- *There is a trading estate within the community.*
- *The only land available is off Cogan Pill Road but this is more suitable for residential development.”*

5.42 Welsh St Donats Community Council commented that it *“has no suitable land or sites to propose for development. The Community Council area consists of farmland, NRW forest and four small residential-only hamlets and outlying farms. The Council understands residents are keen to preserve this rural environment.”*

Cardiff Capital Region Market Area

5.43 This section considers the sub-regional economy in which the Vale of Glamorgan operates, the Capital Region, and each of the districts which fall within that economic area on an individual basis. BE Group has completed employment land evidence for most of these local authorities, over the last three years. Where this has not occurred, BE Group has consulted with the relevant local authorities on their policy positions as of spring 2022. In all cases, strategic sites and market issues which may impact on the neighbouring Vale of Glamorgan are considered.

Blaenau Gwent

5.44 The Blaenau Gwent Local Development Plan was adopted in November 2021 for the period up to 2021. The plan sets out an objective to deliver 50 ha of employment land and a range of premises to meet the needs of local businesses and offer employment opportunities for local people by 2021.

5.45 The 50 ha of supply includes the following that were designated solely for class B1 use – the Business Park allocation at ‘The Works’ Business Hub, Land at Festival Park, Land at Tredegar Business Park and Land at Rising Sun Industrial Estate. Many of these fall into the Ebbw Vale Enterprise Zone. Such uses are found to have an important role to play in terms of fostering entrepreneurialism and developing an enterprise culture, factors which are of key importance if the local, and indeed regional, economy is to grow in a sustainable fashion.

5.46 In addition to those sites allocated for future development, the Council specifies the sites that it deems important to protect from development outside the classes

currently assigned. Among these is the Tredegar Business Park which *“is ideally suited as a location for high quality, office based uses which are geared towards the diversification of the employment base and growth of innovation and enterprise within the local economy.”*

- 5.47 In October 2019, BE Group conducted an Employment Land Review study for Blaenau Gwent Council. It found that the realistic employment land supply was 45.81 ha over 12 sites. *“With quantitative land needs of up to 41.85 ha against a supply of 45.81 ha, there is enough land available to meet needs, although the resulting surplus is not large. To meet needs on a strongly pro-growth strategy, Blaenau Gwent requires effectively all the remaining allocated land it has.”*
- 5.48 The 13.20 ha Rhyd y Blew employment site was considered land that has larger than local significance and was a key regeneration investment site for the County Borough. A major development site in the Ebbw Vale Enterprise Zone, and Welsh Government owned, it has consent for a 4,955 sqm B1/B2/B8 industrial or warehouse unit on a site of 2.88 ha (which incorporates some expansion or further development land). At the time of writing the site was on the market, for sale, as a development opportunity.

Bridgend

- 5.49 The Bridgend Local Development Plan was adopted in 2013 for the period 2006-2021. This plan outlines four Strategic Regeneration Growth Areas at Bridgend, Porthcawl, Maesteg and the Llunfi Valley and The Valleys Gateway. It also details four Strategic Employment Sites – Brocastle, Waterton, Bridgend; Island Farm, Bridgend; Pencoed Technology Park, Pencoed; Ty Draw Farm, North Cornelly. The portfolio of Employment Sites combined totals 45.9 ha of available land for employment purposes.
- 5.50 In 2018, a Deposit Plan was prepared by Bridgend Borough Council in order to underpin the preparation of the Replacement Local Development Plan for the period 2018-2033. Within this, two employment sites were identified as prominent employment assets to attract high quality businesses and investment to the County Borough in a manner that would contribute to the local and wider regional economy. These sites included Brocastle, Waterton (20.4 ha) site as well as Pencoed Technology Park (5.4 ha).

- 5.51 Bridgend is the main area for growth in the County Borough and is a focus for commercial service and employment development to meet the needs of a wide area beyond the County Borough boundaries, extending into the west of the Vale. It has 42 percent of the County Borough's vacant employment land and is a focus for population, economically active people and retail and community service provision. Until 2020 it was home to the Ford Engine Plant, which has now closed with the loss of 1,000 jobs and impacts to the automotive sector across Wales and South West England. At the time of writing the 1.7 million sqft (158,000 sqm) 64 ha site was on the market to find a new use. Agents on the site are now moving to best bids with some 22 recorded enquiries. The wider Bridgend/Waterton Industrial Estate however is occupied by a number of strategic occupiers including a distribution centre for Lidl. CGI Inc., the Global IT and business services company are located at Waterton Industrial Estate.
- 5.52 Brocastle, Waterton is described as one of the most important and prestigious greenfield inward investment sites within the South Wales Corridor. The 46.1 ha site received infrastructure investment in 2020 to open it up for some 70,000 sqm of development expected to focus on B8 logistics. Agents have been progressing the sale of serviced plots here, with around half the plots under offer at the time of writing. Land is achieving £150,000-175,000/acre (£370,000-430,000/ha).
- 5.53 Pencoed Technology Park is located next to Junction 35 of the M4 east of Bridgend, with good proximity to public transport facilities, particularly at Pencoed Railway Station. It is a focus of quality life sciences and high tech businesses in the area and is already the home of a number of high profile companies including ReNuron and Othro Clinical Diagnostics in life sciences and the Sony UK Technology Centre and National Imaging Academy Wales in other high tech sectors. It is expected to remain a significant draw for such uses, located on the edge of Vale of Glamorgan and a barrier to developing an equivalent high technology park in the Vale.

Caerphilly

- 5.54 Caerphilly County Brough Council commenced a review of its adopted LDP in spring 2020. BE Group was commissioned to conduct an Employment Land Review on behalf of the Brough Council in 2021, updating a 2014 Study, also completed by BE Group. It was found that the remaining supply of LDP allocated land, 45 ha, will meet overall needs to 2035 of 39.60 ha. The following major employment sites were identified:

- Oakdale Business Park - Oakdale Business Park is one of the flagship employment locations of Caerphilly. A range of national and international businesses, which have been attracted to this location, including production facilities for General Dynamics, with IG Doors operating from Plateau 1, Oakdale. Plateau 1 has some 15.2 ha of available development land which the Welsh Government is looking to purchase from the Borough Council and invest some £3 million to open up the site for future development
- Penyfan, Croespenmaen (73.01 ha) - The largest single industrial estate in Caerphilly County Borough, Penyfan provides a good mix of (mostly) industrial accommodation ranging from small business workshops to facilities for larger national/international firms such as and Thermo Fisher Scientific.
- Celynen, Newbridge (9.13 ha) - Land in South Celynen is in use as a major research and development facility, of national significance for Axiom Manufacturing Services. It is therefore an asset of high economic importance for Caerphilly
- Dyffryn Business Park, Ystrad Mynach (29.37 ha) - One of the largest industrial estates in the County Borough offering a good mix of B1(c) workshop accommodation and larger B2/B8 space. The site has a high occupancy rate and has expanded in the north.

5.55 The above are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area

Cardiff

5.56 The Cardiff Local Development Plan was adopted in January 2016 for the period of 2006-2026. At the time of adoption, Cardiff had an industrial land supply of 69.7 ha as well as a potential office supply of 426,971 sqm. This amounted to a total employment land supply of 112.39 ha. With the average land take up rates of 10-11 ha/year, it would appear that Cardiff had enough supply to last only until 2022 rather than the length of the plan period which ends in 2026. This land supply shortfall is identified by Council officers who note that recent attempts to expand the City's supply have not been successful. For example, there was a failure to develop 12 ha at Wentloog due to planning objections as part of the Gwent Levels.

5.57 Given this shortfall in supply, economic development officers for the City report that

they do pass large industrial enquiries on to the Barry area where a range of at least small industrial sites and premises are more likely to be available.

- 5.58 Cardiff is a focus for the Welsh office economy, with 985,000 sqm of office floorspace as of 2020, 29.7 percent of all office accommodation in Wales, at that time and more than half of the 1.908 million sqm of floorspace in the Capital Region. Supply is focused in the City Centre and Cardiff Bay Area, with a focus on telecommunications and the media. The latest market reports suggest that, as of May 2022, the City's office market has rebounded to pre-Pandemic levels. In Quarter one 2022, some 121,000 sqm of office accommodation was transacted, three quarters of it Grade A space, the highest Q1 take-up since 2019, and 214 percent above Q1 2021 (Savills, 2022). While the economic issues of 2022 may yet put a break on market recovery, the evidence is that Cardiff's market is recovering well, particularly for the best quality options, potentially reducing opportunities for office investment elsewhere in the Capital Region.
- 5.59 The City's office supply increased by 16 percent from Q4 2021, very significant growth as development/refurbishment projects stalled over the last two years completed. However, with a limited development pipeline and a strong start to 2022 in terms of take-up, it is likely the market will reduce in the remaining quarters of the year.
- 5.60 Cardiff Central Enterprise Zone and Regional Transport Hub is the largest brownfield site at 78.8 ha and represents a major employment-led initiative. The Cardiff Central Enterprise Zone is a 56.7 ha central business district and a focus for financial services in Wales, which could link to high tech investment at the Vale's Cardiff Airport and Bro Tathan Enterprise Zone. Most recent development has been for accommodation, student accommodation or leisure uses, however.
- 5.61 Another strategic employment site is found on land south of St Mellons Business Park. The site will provide 44 ha of business land capable of accommodating 9 ha of campus style high quality development similar to the existing business park at St Mellons.

Merthyr Tydfil

- 5.62 Merthyr Tydfil County Borough Council adopted a Replacement Local Development Plan in January 2020 for the period 2016-2031. The Local Development Plan

allocated 30.65 ha of employment land for B-Class uses.

- 5.63 BE Group was commissioned in 2017/18 to complete an Employment Land Review for Methyr Tydfil. At the time, quantitative land needs were assessed to be 14.46 ha which compared to a realistic land supply of 38.42 ha. This indicated that there was enough land to meet needs, with a surplus of 24 ha.
- 5.64 Major sites included a 14.75 ha site at Goat Mill Road which represented one of the largest parcels of flat development land in the County Borough. The site was suitable for to house waste management facilities and had strong interest at the time from one B-Class occupier who was looking to take up the whole site.
- 5.65 Another major site was located on land to the east of A4060 at Ffos-Y-Fran and was 11.30 ha in size. The site continues to attract B-class occupier interest. This site is also suitable for waste management facilities.

Monmouthshire

- 5.66 Monmouthshire County Council adopted its Local Development Plan in 2014 for the period 2011-2021. The document allocated 50.1 ha of land for new industrial and business development (B1, B2 and B8 uses) while it also included 71.41 ha of mixed use sites, totalling 121.53 ha of supply.
- 5.67 In 2021 BE Group was commissioned by Monmouthshire County Council to conduct an Employment Land Review, updating a number of previous studies, some also completed by BE Group. In the study BE Group assessed the land allocated in the Local Development Plan and found 40.29 of the 121.53 ha could realistically be considered developable. This together with the estimated land need of 43.0 ha indicated that the Monmouthshire had a supply deficit and therefore further supply was needed to accommodate this and ensure flexibility in the market.
- 5.68 Major employment sites include a 4 ha site at Wales One, located on the M4. The site is adjacent to the existing Wales One office park that also has a hotel and would be a logical extension of the park. The site could potentially house a high-quality business park development and appears straightforward to develop.
- 5.69 Monmouthshire also has a key role in the logistics market for the Cardiff Capital Region given its position on most of the strategic routes to and from England. Key in this regard is Newhouse Farm Distribution Park, Chepstow, a major logistics facility

off Junction 2, M48 which is home to distribution facilities for major employers such as Asda, Aluk and Bidfood. Any development of further B8 accommodation in this key gateway area would affect logistics demand further west along the M4 Corridor.

Newport

- 5.70 The current Local Development Plan was adopted in 2015. In 2020 a Review of that LDP was commenced, with Candidate Sites exercises completed in 2021. BE Group was commissioned in 2022 to produce an Employment Land Review for Newport City Council. It was found that the city had a realistic employment land supply of 157.8 ha. Employment land forecasts found the future land need in Newport is 77.0 ha over 2021-2036, to account for Newport's needs as well as further needs at the strategic level. Consequently, the supply was significantly in excess of the requirement to 2036.
- 5.71 BE Group's Larger than Local Employment Land Study completed in March 2020 recommended four of Newport sites be considered strategic employment sites. These are Duffryn/Imperial Park (38.5 ha), Eastman (43 ha), Celtic Business Park (30.5 ha) and East of Queensway Meadows (27.0 ha).
- 5.72 Duffryn/Imperial Park is a Welsh Government owned extension to the 142 ha Imperial Park which is on the western edge of Newport, near Junction 28, M4. Imperial Park comprises offices, including a serviced research and development centre (Compound Semiconductor Applications Catapult), small, modern production units, large manufacturing and warehousing operations and Europe's largest Tier 3 data centre for Next Generation Data. Major companies operating here include Gocompare.com, Vantage, Smiths News and Beachcroft. This significant cluster of high value uses is likely to generate significant competition for equivalent facilities in the Cardiff Capital Region, which might include the Cardiff Airport-Bro Tathan Enterprise Zone and plans at Renishaw.
- 5.73 Celtic Springs houses high quality office users such as Airbus, Ministry of Justice Shared Services, Wales and West Utilities and Nucleus Healthcare and so the 6 ha of space could be developed to accommodate more office users of similar calibre. Eastman has the potential to accommodate a mix of B-class units including specialist chemical uses.

Rhondda Cynon Taf

- 5.74 Rhondda Cynon Taf (RCT) County Borough Council commissioned the production of an Employment Land Review in 2008. The study found that the total amount of potential employment development allocations in the County Borough was 157.56 ha. This total was far in excess of the estimated 50 ha of land needed for the period up to 2021.
- 5.75 RCT County Borough Council adopted its Local Development Plan for the period up to 2021 in March 2011. The Local Development Plan included a significant 14.32 ha allocation of land at the Coed Ely employment site for B1/B2 usage. The site comprises three vacant development plateaus and a spine road connecting to a roundabout on the A4119 Ely Valley Road. Significant highways infrastructure works were completed on site in 2019/2020. A 3,000 sqm speculative business unit was completed for the County Borough Council in 2020 and is now occupied by Mallows Beverages and Contract Bottler.

Torfaen

- 5.76 The Preferred Strategy for the Replacement Local Development Plan (RLDP) was approved by Council in November 2020. To support this, BE Group was commissioned by Torfaen County Borough Council in 2019 to complete an Employment Land Study. This indicated that, of the 68.9 ha of employment land allocated within the previous LDP, 26.33 ha could be considered realistic supply. This could meet the projected needs of 14.12 ha over 2018-2033. However, the Study also concluded that there was qualitative market evidence for the need to allocate a greater supply of land than the modest requirement of 14.12 ha would suggest. Evidence was provided for strong demand for industrial units, particularly larger properties of 10,000 sqm which the County Borough can rarely provide. Demand comes both from inward investors and local businesses looking to grow. Local developers are delivering smaller industrial options but nothing above 1,000 sqm. There are also constraints on supply in the main settlement of Cwmbran and dependence on two strategic sites – SAA3: Llantarnam Strategic Action Area and EET4/1: Craig y Felin. Questions of deliverability remain over both these sites.
- 5.77 Based on the available qualitative evidence it was thus recommended that Torfaen Council allocate employment land above the OAN identified in this Study. Large sites will be required, focused in Cwmbran and Pontypool, which can meet multiple large business requirements, of 2.5-8 ha each and also accommodate a range of smaller requirements. Meeting these needs will require the Replacement LDP to provide a

further 20-30 ha to 2033, additional to the realistic long term supply still available (26 ha). BE Group is now working with the County Borough Council to identify where those sites could be located in Torfaen.

- 5.78 EET4/1: Craig y Felin comprises some 10-20 ha of greenfield development land off the A4042. Negotiations on the nature of the development which could be accommodated here are ongoing, although a scheme of larger B2/B8 units is likely.
- 5.79 Also, key is SAA7: Llanfrechfa Grange Strategic Action Area, which is adjacent to Llanfrechfa Grange Hospital, Cwmbran. Land here is owned by the Health and Social Services Department and Welsh Government. Current Plans would see a Medi Park of some 5.2 ha delivered here with land made available to firms engaged in service and supply activities associated with the life sciences, as well as 'core R and D and production' in medical sectors. This development, along with another Life Sciences park, of some 22,500 sqm, planned at Coryton, on the north-west outskirts of Cardiff are likely to meet most needs from life sciences businesses in the Cardiff Capital Region.
- 5.80 Also, likely to be of larger than local significance will be redevelopment plans at Mamhilad Park Estate which will remove at least a portion of this 72,000 sqm facility and displace some of the 150 businesses which operate from here across the sub-region.

Summary

Public Sector Engagement

- 5.81 BE Group and Per Consulting have consulted with officers of the Welsh Government, Cardiff Capital Region, Vale of Glamorgan Council and the Farmers Union Wales. Some key points:
- *Bro Tathan (St Athan) Enterprise Zone* – After a decade of operation there are now some 26 businesses on site in a diverse range of engineering and high technology sectors. There are 1,200 jobs in the Enterprise Zone site, 700 on Aston Martin, with further 1,200 on the remaining MOD facilities. The Eastern Zone (48.5 ha net) will be the next development area, ready for new development by 2025, with various high level discussions underway as to what could go there. Stakeholders highlight that a key weakness of Bro Tathan is its lack of services, shops, hotel, hot food, etc. to support the 1,200 who work in the Enterprise Zone.

- *Aberthaw Power Station* – Now owned by CCR, it will take some 6-7 years to clean up the site and ready it for development. No firm development proposals have been agreed, although a site masterplan has been commissioned for the site to commence in later in summer 2022. CCR have received a range of suggestions from business for uses on the site, including for energy production and storage, data centres and giga factories.
- *The Barry Making Waves Project* – Plans, which still require funding, include 2,900 sqm of Business Incubation space on ‘the Mole’, in the Western Dock.
- *New Livestock Market/South East Wales Food Park* – A site of 0.4-0.8 ha is needed to support a new livestock auction centre for the Vale, increasing to 1.6 ha to provide space for other businesses to co-locate with the auction centre. The Council has indicated that land may be available to meet this requirement, but there is a shortfall of around £1million in the capital costs which needs to be filled before the project can proceed. There is now the opportunity to combine this with a South East Wales Food Park Development, which requires a 1.6 ha site accommodating up to 13 units of 150-800 sqm each, together with a development kitchen and business innovation suite. Both could be co-located in the Vale, on a site of some 3.2 ha, if such a site can be acquired locally at a limited cost.

Business/Landowner Consultations

5.82 Select consultations have been undertaken with key businesses and landowners, particularly those with significant growth plans within the Vale. Key points:

- *Renishaw, Land South of Junction 34, M4* – Renishaw have Reserved Matters consent for 50,000 sqm, for its own use, alongside its existing facilities. Renishaw have indicated that in 2022 it will commence development of 40,000 sqm of additional buildings, consisting of two new production halls and an employee welfare facility. On the other land, consented for B-Class development in 2014. Renishaw report lots of interest in this land and is in confidential discussions with several parties for delivery
- *Barry Docks* – Docks owner ABP is now taking a more active approach to opening up the Docks to investment. It has moved low value tenants out and demolished poor-quality space to create a 21 ha platform for new development. The company would be open to moving the Docks security fence to create areas of open and unsecured land for general development, including for non Port-related employment

- *The Chemicals Complex, Barry* – In addition to the active chemicals' producers, there are large areas of vacant land along Hayes Road and Sully Moors Road which regularly come on the market as development opportunities sites. At the time of writing the 19.43 ha Greenhill Investments owned Hayes Road site is on the market, for sale or to let, in three plots. Much of the east of the Complex is subject to a 99 year lease to developer St Modwen which is likely to be interested in schemes for investment and development here
- *Model Farm* – Agents for Legal and General have confirmed that the investor remains committed to a development here but is taking the long term view about when the scheme might come forward. It still sees strong potential here for a high-quality business cluster.

Community and Town Councils

- 5.83 Community/Town Councils, responding to this Study, were keen to protect their local areas from development, and focus large scale employment schemes onto the larger settlements of the Vale.

Cardiff Capital Region Market Area

- 5.84 The sub-regional economy in which the Vale of Glamorgan operates has been considered, particularly strategic sites and areas which will influence the Vale. By District the key issues are:
- *Blaenau Gwent* – The 13.20 ha Rhyd y Blew employment site has larger than local significance and may accommodate a large B2/B8 development. It was on the market at the time of writing
 - *Bridgend* – Bridgend town is the main area for growth in the County Borough, with a catchment which will include the western Vale. The loss of the Ford Engine plant will impact on the automotive sector across the Capital Region. However, Bridgend is still home to several major employers while delivery is progressing on the 46.1 ha Brocastle, Waterton. Serviced plots are on the market here. Also, of larger than local significance is Pencoed Technology Park at Junction 35 of the M4. Home to a range of high technology businesses it is expected to remain a significant draw for such uses, located on the edge of Vale of Glamorgan and a barrier to developing an equivalent high technology park in the Vale

- *Caerphilly* – A centre for high end and large scale manufacturing in the Valleys, considerable strategic expansion land remains on the Oakdale Plateaus
- *Cardiff (Industrial)* – City Council officers report some shortfall in industrial land, against take up rates, and economic development officers for the City report that they do pass large industrial enquiries on to the Barry area where a range of at least small industrial sites and premises are more likely to be available.
- *Cardiff (Office)* – Cardiff is a focus for the Welsh office economy, with 985,000 sqm of office floorspace as of 2020, 29.7 percent of all office accommodation in Wales and more than half of the 1.908 million sqm of floorspace in the Capital Region. Supply is focused in the City Centre and Cardiff Bay Area, with a focus on telecommunications and the media. Evidence is that Cardiff's office market is recovering well from the Covid-19 Pandemic, particularly for the best quality options, potentially reducing opportunities for office investment elsewhere in the Capital Region.
- *Merthyr Tydfil* – Merthyr Tydfil is home to several strategic sites off the A4060, east of Merthyr Tydfil town. These sites link more to the A465 Heads of the Valleys Corridor than the Vale, however
- *Monmouthshire* – Monmouthshire has a key role in the logistics market for the Cardiff Capital Region given its position on most of the strategic routes to and from England. Key in this regard is Newhouse Farm Distribution Park, Chepstow, a major logistics facility off Junction 2, M48. Any development of further B8 accommodation in this key gateway area would affect logistics demand further west along the M4 Corridor.
- *Newport* – Newport is home to three Duffryn/Imperial Park (38.5 ha), Eastman (43 ha), Celtic Business Park (30.5 ha) and East of Queensway Meadows (27.0 ha). Duffryn/Imperial Park is a Welsh Government owned extension to the 142 ha Imperial Park which is on the western edge of Newport, near Junction 28, M4. It forms a significant cluster of high value uses is likely to generate significant competition for equivalent facilities in the Cardiff Capital Region, which might include the Cardiff Airport-Bro Tathan Enterprise Zone and plans at Renishaw. Nearby Celtic Springs houses high quality offices while Eastman has the potential to accommodate a mix of B-class units including specialist chemical uses, which will overlap with the Barry Chemicals Complex.

- *Rhondda Cynon Taf* – Key is the Coed Ely employment site for B1/B2 usage. Development is only progressing slowly here, however.
- *Torfaen* – Key will be site SAA7: Llanfrechfa Grange Strategic Action Area, which is adjacent to Llanfrechfa Grange Hospital, Cwmbran. Current Plans would see a Medi Park of some 5.2 ha delivered here. This development, along with another Life Sciences park, of some 22,500 sqm, planned at Coryton, on the north-west outskirts of Cardiff are likely to meet most needs from life sciences businesses in the Cardiff Capital Region.

6.0 EMPLOYMENT LAND ASSESSMENT

Introduction

- 6.1 This section looks at the portfolio of potential employment land in the Vale, not only how much there is, but also its quality, type, suitability and availability. The Vale of Glamorgan needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. Having initially established how much land there is, the second task is to consider how much is needed in the future (to 2036), which is picked up in the forecasting section later in the report.
- 6.2 In order to assist economic recovery from the effects of Covid-19, it is even more important that businesses are able to easily establish, expand or relocate premises within the Vale. Therefore, ensuring that there is adequate provision of appropriately located, deliverable and attractive employment sites and premises in the Vale is vital. However, Welsh Government guidance states that sites must not be merely carried forward within a new Local Development Plan and must be reassessed for their ongoing potential for employment uses. This chapter undertakes that assessment of the employment land supply.

Land Supply

- 6.3 The starting point for the supply side assessment is the Vale of Glamorgan Local Development Plan 2011 – 2026 (adopted 2017), which allocates 11 sites for future employment development under Policy MG9. Table 15 details these employment land allocations, which total 492.24 ha gross or 368.91 ha net.

Table 15 – Sites Allocated for Employment Use in the LDP by Policy MG9

Site Ref	Site Name	Uses	Size, ha (Gross)	Size, ha (Net)
Strategic Sites				
1	Land to the South of Junction 34 M4 Hensol *	B1, B2, B8	55.16	29.59
2	Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	B1, B2, B8	77.40	76.64
3	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	Aerospace Business Park, Employment & education	305.00	208.00

Site Ref	Site Name	Uses	Size, ha (Gross)	Size, ha (Net)
<i>Sub-Total</i>			437.56	314.23
Local Employment Sites				
4	Atlantic Trading Estate	B1, B2, B8	9.14	9.14
5	Land at Ffordd y Mileniwm	B1, B2, B8	8.90	8.90
6	Hayes Lane, Barry	B1, B2	1.40	1.40
7	Hayes Road, Sully	B1, B2	7.50	7.50
8	Hayes Wood, Barry	B1, B8	1.90	1.90
9	Llandow Trading Estate	B1, B2, B8	6.80	6.80
10	Vale Business Park	B1, B2, B8	12.40	12.40
11	Land to the South of Junction 34 M4 Hensol*	B1, B2	6.64	6.64
<i>Sub-Total</i>			54.68	54.68
Total			492.24	368.91

Source: Vale of Glamorgan Council, 2017

*6.64 ha of the overall 61.80 ha site Land to the South of Junction 34 M4 is designated as land to meet local rather than strategic needs.

- 6.4 With some modest variation, this supply reflects the findings of the Vale of Glamorgan Employment Land and Premises Study (2013) on what employment land is realistically available.
- 6.5 Additional to the above allocated supply, the Council identified two other consents for B1/B2/B8 uses, unimplemented at the time of writing:
- Site 12: Windmill Park, Hayes Road, Barry – 0.64 ha (App. No. 2019/00406/FUL)
 - Site 13: Jordan Civils Ltd., Vale Business Park, Tumulus Way, Llandow – 0.41 ha (App. No. 2016/01322/FUL).
- 6.6 Combining these two sites with the LDP allocations gives a combined baseline supply of 493.29 ha gross and 369.96 ha net. This combined land supply is analysed below.

Supply Analysis

- 6.7 Table 16 analyses the Vale of Glamorgan's combined supply, outlining the size, nature and location of each site, providing comments on its status and recommendations on its future delivery. It also identified the realistically available

amount of employment land in each site. The Table summarises Site Proformas provided at Appendix 2.

- 6.8 The analysis reflects Welsh Government Guidance: '*Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan*'. It also reflects site assessment practice currently being implemented in South Wales and outlined in '*Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales*' (Report of the Pathfinder Group, 2017).
- 6.9 Of the baseline supply of 493.29 ha gross and 369.96 ha net, the following comments can be made:
- *Land to the South of Junction 34 M4 Hensol* – Despite a lack of delivery on this land since the 2013 Employment Land and Premises Study, Renishaw is confident it can commence significant delivery here over the next few years. Discussions are underway with a range of occupiers and Renishaw indicates that it will commence work on its own expansion in 2022/2023 which will help open up the wider area for development. Thus, the Land to the South of Junction 34 M4 Hensol continues to remain a deliverable employment site for the Vale
 - *Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)* – Despite some planning issues, work is progressing on two key schemes – Cardiff and Vale College and Model Farm – and all parties appear committed to development, albeit possibly on medium to long term timeframe. The Council is also looking at options to develop its remaining ownerships on the site. Thus some 61.05 ha appears realistically deliverable at this time for B-Class uses
 - *Aerospace Business Park, St Athan, Rhoose (part of Cardiff Airport Bro Tathan Enterprise Zone)* – After the success of the development of the Northern Zone, which is nearing completion, the Eastern Zone will become the new, and likely final, focus for development. Confidential discussions are underway with a number of parties and the Welsh Government expects to have the site opened up by 2025, with £30 million allocated to fund this. The 48.5 ha of land within the Eastern Zone is thus the realistically available supply here moving forward

Table 16 – Employment Land Analysis

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
Strategic Sites							
1	Land to the South of Junction 34 M4 Hensol	Large greenfield plot located adjacent to large manufacturing facility for Renishaw just off the M4, junction 34	<p>Constraints, which relate to the whole Strategic Site, include:</p> <ul style="list-style-type: none"> Watercourses, field boundaries and farm tracks cross the site. Trees on site (multiple Tree Preservation Orders) Includes land with a Site of Special Scientific Interest and a Special Landscape Area Includes multiple other areas of high ecological value Includes land protected for mineral resources and Sand/Gravel Allocation Areas Multiple boreholes in the south east of the site Partly in a flood risk area. The site contains some Zone B flooding which is mainly situated to the south of the site. The whole site (including the strategic allocation) has approximately 18.77Ha of Zone C2 flooding the majority of which is located in the northern area of the site. The site also has minor, intimidate and major surface flooding on the site which is mainly in the northern area of the site. Area has limited surface water drainage capacity Wastewater treatment plant adjacent. <p>To address the primarily environmental constraints across the Strategic Site, the</p>	<p>Planning consent 2014/00228/EAO proposes</p> <ul style="list-style-type: none"> A 92,903 sqm B8 warehouse allocation on 18.57 ha A 6.64 ha B1/B2 business park. 1 ha of land for additional road access, to open up the remaining land for development Non-B class employment uses are proposed on 1.45 ha (a hotel or residential training centre). <p>Planning application 2019/01421/RES involved the first phase of development pursuant to outline permission 2014/00228/EAO while 2021/00899/EAO seeks to extend the period of time for submission of reserved matters by a further five years.</p> <p>Business Park</p> <p>Renishaw report lots of interest in this land and is in confidential discussions with several parties for delivery. Broadly it is seeing demand from larger logistics operators and for data centres. Delivery also depends on if a Bypass and/or park and ride is delivered close to the site.</p> <p>Renishaw Factory and Expansion</p> <p>The existing factory comprises some 50,000 sqm employing 650 people, engaged in component manufacturing and some R&D. Have Reserved Matters consent for another 50,000 sqm, expected to employ 450-500. Renishaw have indicated that in 2022 it will commence development of 40,000 sqm of additional buildings, consisting of two new</p>	55.16	29.59 strategic	Yes

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
			<p>Outline Application provides for 31.55 ha of mitigation, including:</p> <ul style="list-style-type: none"> • A zone for revisions to earthform, diversion of watercourse and strategic drainage provision • Retained Tree Preservation Areas • 10-metre-wide landscape buffer to railway line and setting • Open Space zone for ecological protection mitigation areas. • The indicative master plan approved as part of the outline planning consent shows the local employment area (labelled as site C), is located outside of constraint areas including the Zone C2 flooding. 	<p>production halls and an employee welfare facility. The existing production halls will also be refurbished to reduce Renishaw's greenhouse gas emissions. The construction will be completed in phases, with a 15-month programme of work starting in July 2022 to build the first of the new halls (17,540 sqm), the welfare facility and supporting infrastructure. The basic shell for the second new production hall (18,190 sqm) will be built by December 2024 and will be fully constructed when business levels require its use. The details of the operations that will take place in each of the new halls is yet to be fully determined, but the additional capacity will allow for increases to machining operations and the assembly of products already built at the site, including Renishaw's metal additive manufacturing (3D printing) machine</p>			
2	Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	Large plot of greenfield land adjacent to Cardiff Airport and south of A4226 Port Road, mostly in agricultural use.	<p>Farm buildings, watercourses, field boundaries and farm tracks cross the site. Trees on site</p> <p>Land uneven and sloping in places</p> <p>A Public Right of Way runs along the eastern boundary of the site</p>	<p>Part of the Enterprise Zone with the Aerospace Business Park. The wider Enterprise Zone will benefit from the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment.</p> <p>Several development projects proposed: 1. Cardiff and Vale College Advanced Technology Centre - A £73.9 million new campus investment of 9,000 sqm, including a dedicated centre for advanced manufacturing, is proposed on some 2.7 ha of land off the Port Road entrance to the Airport and south east of the existing Airport Business Park (plus possibly another 1 ha to act as a buffer zone for future expansion). Development is subject to planning, the sale of Council land to the College (sale contract recently entered into), and the Welsh Government providing a financial mechanism for the college to finance the investment of between £50 million to £55 million, payable over 25 years through a Mutual Investment Model (Outline Business Case submitted to the Welsh</p>	61.05 - developable under current plans excluding the Advanced Technology Centre as mostly non B-Class	61.05 – developable under current plans excluding the Advanced Technology Centre as mostly non B-Class	Yes

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
				<p>Government in July 2022). The facility will house around 2,000 students and staff.</p> <p>The advanced manufacturing campus, based on strong links with employers, including those in the aerospace and automotive sectors, would replace the College's current smaller International Centre for Aerospace Training (ICAT) to the west. The cost of the investment will be offset by the College's sale of ICAT and its Colcot Road, Barry campus, which is expected to generate some £5 million in receipts. Initial planning would see development completed by 2026.</p> <p>2. Airport Business/Commercial Park - 16.3 ha, less the above Advanced Technology Centre, of (primarily) Council-owned land adjoining the existing Airport Business Park. Building on the Advanced Technology Centre proposal, the Council are looking to take forward for redevelopment the remainder of this land as a commercial/business park as per the SPG vision. A high level masterplan is now being prepared. There are no firm development plans at this time.</p> <p>Development would likely either be via a Joint Venture between the Council and a developer partner or a land sale to a relevant party, possibly linked to the adjacent Model Farm proposals (see below).</p> <p>3. Model Farm - Based on the Legal and General owned land in the east of the site, south of Port Road. A Hybrid planning application (App. No.2019/00871/OUT) was submitted for, in outline, the demolition of existing buildings and erection of 44.75ha Class B1/B2/B8 Business Park, car parking, landscaping, drainage infrastructure, ecological mitigation and ancillary works and, in full, and a change of use from agricultural land to country park. This proposed the development of B1, B2, B8 premises along the southern side of Port Road and environmental mitigation/country park to the south. An approval of the application was quashed by the High Court in October 2021,</p>			

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
				following concerns being raised with issues including the publicity of viability evidence. The application remains under review. Agents for Legal and General have confirmed that the investor remains committed to a development here but is taking the long term view about when the scheme might come forward. It still sees strong potential here for a high-quality business cluster reinforced by Cardiff and Vale College's investment nearby. It has a development partner for the project.			
3	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone or Bro Tathan)	Strategic Business Park comprising the partial redevelopment and reuse of the St Athan MOD facility and now including aircraft maintenance facilities and a strategic manufacturing facility for Aston Martin.	<p>Surface water drainage.</p> <p>Aeronautical constraints, particularly the obstacle limitation surface on the runway. Operational clearance zone of taxiway Echo/maintenance area.</p> <p>Existing buildings, hard surfaces and other structures that will need to be demolished.</p> <p>Landscape and standing water restrictions owing to the risk of attracting birds.</p> <p>Shallow bedrock and potentially high water table.</p> <p>Potential presence of archaeological remains.</p> <p>Potential for localised ground contamination.</p>	<p>The wider Enterprise Zone will benefit from the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment.</p> <p>Development Areas</p> <p>The whole of St Athan comprises 486 ha, of which 146 ha is developable, net of the airfield, etc. Within that developable area:</p> <ul style="list-style-type: none"> Northern Zone (32 ha) – Now largely full, with the final plot under offer to a confidential party. This final plot comprises 10,000 sqm in four buildings on 8 ha Eastern Zone (48.5 ha or 51.3 ha gross) – This will be the next development area. The MOD will vacate this area in Summer 2023, with the land then transferred to the Welsh Government. The site will then be cleared and serviced, with £30 million of Welsh Government funding allocated for this. The Eastern Zone will be ready for new development by 2025, with various high level discussions underway as to what could go there Western Zone (81 ha gross) - Comprises much of the air infrastructure. Unlikely to see much new development. Southern Zone (8 ha) – The 'rotary zone' 	51.3 developable as the next phase (Eastern Zone)	48.5 developable as the next phase (Eastern Zone)	Yes

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
				<p>providing helicopter facilities for the Police and Coastguard. This could provide long term development land but would need considerable infrastructure investment to link it to the rest of the area. Development here is unlikely within the Replacement LDP period to 2036.</p> <p>There are 1,600 jobs in the Enterprise Zone site, 750 on Aston Martin, with further 1,200 on the remaining MOD facilities.</p>			
<i>Sub-Total</i>					167.51	139.14	-
Local Employment Sites - LDP							
4	Atlantic Trading Estate	Five brownfield sites situated in the middle of a large mixed industrial estate to the rear of Berry Docks.	<ul style="list-style-type: none"> • Future development of the site should be subject to consultation with Natural Resources Wales (NRW) given the sites' proximity to environmental designations and local water resources e.g., Severn Estuary SAC and SPA, major ground water aquifer, Cadoxton River, Site of Special Scientific Interest, known flood zones. • Varying flood risks across the five plots • NRW has advised that a detailed Flood Consequence Assessment will be required. • Limited surface water drainage capacity. An upgrade to the local sewerage system may be required to accommodate future development proposals. • Archaeological evaluations will be required prior to development. On the south east boundary there is possible archaeological interest (burial site), GGAT should be consulted. • Local power supply issues are known to exist across the area 	<ul style="list-style-type: none"> • Atlantic Trading Estate - Land is owned by ABP and forms part of a wider 21 ha site, known as Atlantic Crescent, which is on the market, to let, for storage / development plots. Clearance/remedial works required prior to occupation. • Plot 6a - West of site is now developed an in use for open storage/small workshops for two trade businesses. The east of the site is under construction for a 4,459 sqm Resource Recovery Facility for the Council. 2.14 ha developed/nearly developed. • Plot 6B - Site under developer ownership, LJ Developments, no identified plans for development at this time • Plot 8 - Site under developer ownership, LJ Developments, and cleared. No identified plans for development at this time • Plot 3B - Fully developed and let as 'Atlantic Point', 14 light industrial units totalling 754 sqm on 0.79 ha 	6.21 less land now developed	6.21 less land now developed	Yes

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
			<ul style="list-style-type: none"> The plot 'Atlantic Trading Estate' is located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site. 				
5	Land at Ffordd y Mileniwm	Large, linear area of irregularly shaped brownfield land, located off a main route through Barry town and sitting north west of Barry Docks	<ul style="list-style-type: none"> Development brief required, related to adjacent Waterfront Redevelopment Area. Close to an existing landfill site and flood risk zones, a detailed Flood Consequence Assessment may be required. Some upgrading of nearby water treatment facilities (Bendricks Sewage Pumping Station) may be required. Archaeological surveys required. Archaeology may ultimately restrict the net developable area. Site located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site. There is Zone B flooding along the southern boundary and minor surface flooding to the North West corner of the site. This is a brownfield site with little nature conservation value. Notwithstanding this, consultation on future development proposals will be undertaken with the Council's ecologist through the normal planning application process if required. The land is also subject to a clawback provision, allowing the previous owner to share in any uplift in value generated by a retail development on the site. This same clause also prevents residential development on the site. Prospects for 	<p>The land has been on the market for sale or to let, for mixed use development opportunities comprising B1, B2, B8 and other uses for over a decade. The location has not attracted significant interest for B-Class uses, over that time. In 2014, the landowner had discussions with a developer for a mixed retail and hot food scheme on 2.43 ha in the centre of the site. An indicative price was agreed for the sale of the land which would have involved the developer also providing services to the site and creating a new access. At the time, the owner felt that this did not offer the best disposal option for them so decided to withdraw from the sale. The site has since remained vacant, and stakeholders indicate that the owner does not have the desire and experience to provide the infrastructure needed to facilitate development.</p> <p>In 2021, a commercial use identified the Site as its preferred location for a new facility, to be developed on 1.25 ha in the centre of the site. The proposed development would include a new access road off Ffordd y Mileniwm into the site. This will open up access to the remaining land.</p>	7.65 less the area proposed for non B-Class uses	7.65 less the area proposed for non B-Class uses	Maybe

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
			B1/B2/B8 development are not affected.				
6	Hayes Lane, Barry	Small parcel of brownfield land found adjacent to Atlantic Trading Estate, now under construction for an industrial scheme.	Any constraints addressed by the present construction	Planning application 2018/01317/FUL saw a full consent granted for the construction of six portal framed buildings and associated roads and the division of buildings to form 42 light industrial units. The scheme, known as Atlantic Business Park was under construction, as of May 2022, for 6,000 sqm of floorspace by Dawan Developments. Atlantic Business Park is being developed in three phases, with the first 13 units ready for occupation by April 2022. The units are available from 135 sqm or multiples thereof, and are being sold with a virtual freehold – a lease of 999 years. Between 30 and 40 per cent of the units are already pre-sold at the time of writing.	0 – Site now developed	0 – Site now developed	No
7	Hayes Road, Sully	Partly wooded brownfield site with coastal frontage	<ul style="list-style-type: none"> Development is restricted to B1 uses, recognising the value of this location in fulfilling a need for high quality B1 sites and reflecting the adjacent Sully Hospital The site is in close proximity to the Hayes Point to Bendricks Rock Site of Special Scientific Interest and consultation with NRW will be required to ensure no adverse impact on this designation. Medium/high risk of contamination from previous uses. Natural Resources Wales has advised that if ground works are proposed a Preliminary Risk Assessment will be required prior to development to assess the potential risk of contamination from historic landfill Area has limited surface water drainage capacity The frontage of the site to Hayes Road includes 0.683 ha of land in the C2 flood zone. A detailed Flood Consequences Assessment may be required 	The site had an Outline consent for 6,000 sqm of B1 light industrial accommodation on the main road frontage (App. No. 2010/00619/OUT), but this lapsed in 2017. The intention was that this would sit alongside a residential scheme on the rest of the site. Accordingly, an Outline application for 130 to 173 dwellings was submitted in 2013 (App. No. 2013/00630/OUT). However, this second application was not progressed by the applicant and after some years of inaction the Council disposed of the application in November 2018. It is understood that the applicant has, over the last decade been seeking a largely or fully residential scheme but that housing has been identified, by Council officers, as unacceptable due to the flood risk from the site's coastal position. A development mix, satisfactory to the landowner has not been identified at the time of writing.	0 – Not developable	0 – Not developable	No

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
8	Hayes Wood, Barry	Small, irregularly shaped brownfield site on the edge of the now developed area of Atlantic Trading Estate	<ul style="list-style-type: none"> Some further drainage infrastructure is required. Further consultation with Welsh Water is needed Ancient area of Semi Natural Woodland to the south, along with the Hayes Point to Bendricks Rock Site of Special Scientific Interest. Consultation with NRW is recommended. Class B2 uses will not be acceptable due to the potential conflict with existing and proposed dwellings. The north eastern corner of the site is located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site. 	No identified development plans.	1.90	1.90	Yes
9	Llandow Trading Estate	Brownfield/greenfield land on the edge of a low quality industrial estate, located in a rural area, accessed via a narrow road off the B4270.	<ul style="list-style-type: none"> NRW have advised that the site(s) are known to drain to a carboniferous limestone aquifer from which ground water is abstracted and restrictions may therefore be imposed on certain uses. Consultation with NRW on any future development proposals will therefore be required Preliminary Risk Assessment (PRA) would be required prior to development to assess the potential risk of contamination from historic landfill as the site is known to lie within 250 metres of a former landfill site. Potential limitations on drainage processes A roost of lesser horseshoe bats is located within 400 metres of the site and a full ecological assessment will be required. Archaeological survey required 	No planning consents on the site. 1.65 ha in the north east of the site, at the junction of Bona Road and Tumulus Way, has recently been sold, on a 999 year long lease as a development opportunity site. The identity of the purchaser, or their plans for the site remain confidential at this time.	0 – Not developable	0 – Not developable	No

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
			<ul style="list-style-type: none"> A stream (Sutton Brook) crosses the site, plus several lesser water courses. Careful planning of drainage required but flood risk is limited Foul flows from some of the sites are accommodated by private sewage treatment works and consultation with the operator may also be required. Site located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment 				
10	Vale Business Park	Two expansion sites for a large rural industrial estate, including a large greenfield expansion plot to the south (MG9.10a) and a smaller brownfield plot to the north west (MG9.10b).	<ul style="list-style-type: none"> Natural Resources Wales have advised that the sites are known to drain to a carboniferous limestone aquifer from which ground water is abstracted and restrictions may therefore be imposed on certain uses. Consultation with NRW on any future development proposals will therefore be required. Natural Resources Wales (NRW) is aware that a European protected species has been recorded in the vicinity of the site and an ecological assessment will be required in support of any future planning application Natural Resources Wales (NRW) is aware that a European protected species has been recorded in the vicinity of the site and an ecological assessment will be required in support of any future planning application The Glamorgan Gwent Archaeological 	No identified development plans	12.40	12.40	Yes

Site Ref.	Name	Site Description	Constraints	Intended Development (If Any)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)	Should the site be safeguarded or identified for employment uses?
			Trust has advised that an Archaeological Evaluation will be <ul style="list-style-type: none"> required in determining any planning application for development. Plot MG9.10b - Aggregate, shipping containers and the remains of demolished buildings on the site 				
11	Land to the South of Junction 34 M4 Hensol	As above	As above	As above	6.64 local	6.64 local	Yes
<i>Sub-Total</i>					34.80	34.80	-
Local Employment Sites - Other Consents							
12	Windmill Park, Hayes Road, Barry	Phase Two expansion of a growing modern industrial estate, west of the Chemicals Complex and part of the wider Barry Employment cluster	Assumed none as development has progressed	Planning consent 2019/00406/FUL for 1,792 sqm of B1/B2/B8 industrial/warehouse development (Phase 2), together with associated parking and access arrangements. At the time of writing all consented floorspace appears to have been developed. Some 3.60 ha of brownfield land remains available for further development to the west.	3.60 – Other development land onsite	3.60 – Other development land onsite	Yes
13	Jordan Civils Ltd., Vale Business Park, Tumulus Way, Llandow	Small brownfield site located within a large rural industrial estate, now partly developed for 949 sqm of light industrial accommodation.	Assumed none as development has progressed.	Planning consent 2016/01322/FUL for the erection of one large building contain six small starter industrial units (850 sqm total, 135/137 sqm each). and one small standalone industrial unit of 99 sqm. At the time of writing the large building was complete, with units on the market, to let as Stonehouse Business Park. The smaller building was under construction.	0 – Now developed	0 – Now developed	No
<i>Sub-Total</i>					3.60	3.60	-
Total					205.91	177.54	-

Source: VoGC/BE Group, 2022

- *Atlantic Trading Estate* – A recent focus for local development, 6.21 ha remains realistically available to meet future needs.
- *Land at Ffordd y Mileniwm* – The site has been on the market for a decade and has only attracted interest for retail and leisure. This may partially reflect the site's peripheral position in the core Barry Docks/Atlantic Trading Estate market area, but also likely the lack of site servicing and access, the costs of which will impact on viability. If judged appropriate on other matters, the proposed commercial scheme would at least provide a new access point from which the rest of the site could be opened up for B-Class uses. With this access development of the rest of the site, for B-Class uses becomes more likely but would still require a degree of external support to attract occupiers and bring forward for development
- *Hayes Lane, Barry* – Site now developed
- *Hayes Road, Sully* – Flood risk issues combined with a strong aspiration for housing by the landowner make delivery unlikely
- *Llandow Trading Estate* – The landowner appears to lack the desire or the finance to develop this land. Given its isolated position and the poor quality of the neighbouring Trading Estate, it appears unlikely that a developer or major occupier will come in to develop this land. Thus, the Llandow Trading Estate site does not appear deliverable
- *Other Consents* – The two consents considered here have now been largely delivered. Windmill Park, Hayes Road, Barry is proving to be a successful new light industrial scheme, meeting local needs and supporting some requirements from Cardiff. Another 3.60 ha of further expansion land remains available for further phases of Windmill Park.

6.10 Allowing for the above issues the realistically available employment supply is 177.54 ha net (205.91 ha gross). This comprises 139.14 ha net (167.51 ha gross) of strategic employment land and 38.40 ha (net and gross) of local employment land. This realistic supply comprises eight sites as set out in Table 17.

Table 17 – Vale of Glamorgan Land Supply

Site Ref.	Name	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)
Strategic Sites			

Site Ref.	Name	Site Size, ha – Realistically Available for B1/B2/B8 Use (Gross)	Site Size, ha – Realistically Available for B1/B2/B8 Use (Net)
1	Land to the South of Junction 34 M4 Hensol	55.16	29.59 strategic
2	Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	61.05	61.05
3	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone or Bro Tathan)	51.3	48.5
Local Land Supply			
4	Atlantic Trading Estate	6.21	6.21
5	Land at Ffordd y Mileniwm	7.65	7.65
8	Hayes Wood, Barry	1.90	1.90
10	Vale Business Park	12.40	12.40
11	Land to the South of Junction 34 M4 Hensol	6.64 local	6.64 local
12	Windmill Park, Hayes Road, Barry	3.60	3.60

Source: BE Group, 2022

- 6.11 All of that realistically available supply shows evidence of deliverability, including clearly stated development plans by parties capable of implementing those plans; planning consents secured/being sought and development on sites or on adjoining sites. Given this good evidence of deliverability it is assumed that all of this available supply will be developed over the RLDP period to 2036.

The Geographic Split of Supply

- 6.12 The three strategic sites have the potential to deliver 139.14 ha net (167.51 ha gross) of employment land to 2036. However, it is important to recognise how each strategic location is differentiated from each other and, therefore, how the three strategic sites provide an important balance of choice across the Vale.
- 6.13 Land to the South of Junction 34 M4 Hensol is the Vale's only motorway related employment site affording the Vale of Glamorgan with an important and strategic market offer clearly differentiated from other employment sites within the Vale.

- 6.14 Since 2016, the Aerospace Business Park, St Athan, Rhoose has become an established regeneration/employment site in a central location, with access to the whole of the Vale. Large parts of the site are dedicated to specialist occupier requirements in aerospace, automotive and related manufacturing, maintenance and testing activities which are of national importance to Wales. The site's Northern Zone, with some 32 ha of land, has been largely developed out in just seven years and given ongoing demand and investment by Welsh Government it is likely that the Eastern Zone, now being opened up, can be brought forward in a similar timeframe. Development of the Eastern Zone could be even more rapid if a single large 'Giga Factory' can be delivered here.
- 6.15 The combination of available land, potential for localised green energy capacity, and critical mass of specialist companies and manufacturing skills at Bro Tathan present a unique offer to the wider UK and international market for specialist manufacturing activity, in an area away from the M4 where there is much less demand from alternative competing uses such as large scale logistics.
- 6.16 With Land to the South of Junction 34 M4 Hensol focused on motorway related industry and warehousing and the Aerospace Business Park focused on a number of specialist sectors, and likely to be developed out early in the RLDP period, the Land adjacent to Cardiff Airport and Port Road, Rhoose has importance in providing a more general offer to high-value manufacturing and high-tech businesses over a longer timeframe. Businesses drawn to this location are likely to come from a broader range of sectors, attracted by access to a regional airport and a strong labour market in and around Barry and the wider Vale. Proximity to the new College facilities will also raise the profile of this strategic development location with increased opportunities for education/business collaboration and the attraction of technical research investment.
- 6.17 Around half of the 38.40 ha of realistically available local supply, 19.36 ha, can be found in Barry which has been/and remains a focus of market demand in the Vale and has seen almost all the recent local scale development. Another 12.40 ha remains available at Vale Business Park which serves the more rural western half of the Vale and again has seen some local scale investment in industrial accommodation in recent years, making further development here more likely.

- 6.18 As was the case in 2013, there is no supply in Penarth or along the edge of Cardiff. Also, nothing in rural towns in the west such as Cowbridge or Llantwit Major.

Site Grading

- 6.19 All realistically available sites have been graded using a standard scoring system (see Appendix 3) which reflects existing Welsh Government Guidance and current practice elsewhere in Wales (see Table 18). Each site is scored out of 15, made up of three individual measures, each scored out of five – Accessibility, Environmental Factors and Market Attractiveness.

Table 18 – Sites Scoring (Realistically Available Employment Sites)

Site Ref.	Name	Total Score, Max 15
1	Land to the South of Junction 34 M4 Hensol	15
2	Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	13
12	Windmill Park, Hayes Road, Barry	13
3	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone or Bro Tathan)	12
10	Vale Business Park	11
8	Hayes Wood, Barry	10
4	Atlantic Trading Estate	9
5	Land at Ffordd y Mileniwm	9

Source: BE Group, 2022

- 6.20 Unsurprisingly, the three strategic sites score well. All three show clear evidence of market demand and enjoy good delivery prospects, although only the Aerospace Business Park, St Athan Rhoose has seen actual delivery to date. Access is unsurprisingly strongest at Land to the South of Junction 34 M4 Hensol which sits adjacent to the M4 Motorway while the Aerospace Business Park, St Athan Rhoose loses some marks for its more isolated position. All three locations have physical constraints, but plans are in place that will address those constraints.
- 6.21 Windmill Park, Hayes Road, Barry also scores well reflecting its strong development prospects, with two phases of Windmill Park already completed, and no significant constraints.
- 6.22 The worst scoring land includes Atlantic Trading Estate which, despite its market success, suffers from its backland position behind Barry Docks and the presence of a

number of 'bad neighbour' occupiers on environmental quality. Land at Ffordd y Mileniwm is located more prominently in Barry but has greater uncertainty on its deliverability.

Employment Land Jobs Capacity

6.23 It is possible to estimate the number of jobs which the net realistic supply of 177.54 ha could support (see Tables 19-20). Doing this requires a number of assumptions to be made however:

- To split the total supply by Use Class: In the Vale it is assumed that the majority of development to 2036 will be for industrial and warehouses uses, reflecting recent development patterns. Some office uses are likely, reflecting forecast jobs growth, but these are expected to be small scale and take up only limited land.
- To convert the land supply (hectares), to floorspace (sqm): It is assumed that each hectare of land would support 4,000 sqm of floorspace or 40 percent site coverage. This reflects standards in the Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan'
- Convert the floorspace into jobs: Average jobs densities for office and industrial/warehouse uses, for Wales, from 'Building an Economic Development Evidence Base to Support a Local Development Plan' are used.

Table 19 – Realistic Employment Land Supply, Split by Use Class

Factor	Use Class (Site Area Attributed to Use Class, hectares)				Totals (ha)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
<i>Percentage Split, by Use Class*</i>	10	10	40	40	100
Realistic Land Supply (Net)	17.75	17.75	71.02	71.02	177.54

Source: BE Group, 2022

*Proportionate division of the need 2021-2036, by Use Class. It assumes the majority of development to 2036 will be for industrial and warehouses uses, reflecting recent development patterns. Some office uses are likely, reflecting forecast jobs growth, but these are expected to be small scale and take up only limited land.

Table 20 – Conversion of the Above Employment Land Supply to Jobs

Factor	Use Class (Floorspace and Jobs by Use Class)				Totals (sqm or jobs)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
Conversion of Land to sqm*	71,016	71,016	284,064	284,064	710,160
Standard Densities (sqm per job)**	16	67	67	67	-
Resultant Employment Capacity	4,439	1,060	4,240	4,240	13,978

Source: BE Group, 2022

*Assumes 4,000 sqm per hectare or 40 percent site coverage, reflecting the Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan'

**Based on Jobs Densities set out in 'Building an Economic Development Evidence Base to Support a Local Development Plan'

6.24 Converting the realistic employment land supply into jobs indicates that the 177.54 ha could support up to 13,978 jobs with the above assumptions. Some 21.6 percent of these jobs would be from the local supply, 3,019, and the remainder, 10,959, from the strategic supply. It is important to emphasise that these are estimates of the number of jobs the employment land supply could support (capacity) not forecasts of future jobs growth in the Vale.

Employment Areas

6.25 In this sub-section an assessment of the Vale of Glamorgan's 22 main Employment Areas is made in order to provide guidance as to their continued viability and options for growth/redevelopment.

6.26 Again, the assessment process used reflects that set out in 'Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales (Report of the Pathfinder Group, 2017). The Areas are graded using the same standard scoring system as per the Employment Sites (see Appendix 3 but with an allowance for internal conditions (reflecting the fact that these locations contain developed property), as well as external factors. Each site is scored out of 30, made up of six individual measures, each scored out of five – Accessibility, Building and Site Quality and Characteristics (Overall Building Quality and Overall Site Quality), Environmental Factors (internal and external), Market Attractiveness.

- 6.27 Detailed proforma analyses are provided at Appendix 4. The analysis is summarised in Table 21, below.
- 6.28 Overall, there is some 913.89 ha of developed land in, or with potential for, B1/B2/B8 uses in the Vale of Glamorgan. 59.4 percent of this, 542.63 ha, is contained within the Cardiff Airport-Bro Tathan Enterprise Zone, including the 210.88 ha Cardiff Airport. Barry Docks and the Chemicals Complex comprise another 21.4 percent or 195.37 ha. The largest purely industrial estate in the Vale is MD16.18: Vale Business Park at 28.29 ha or 3.10 percent followed by MD16.3: Atlantic Trading Estate at 15.06 ha, or 1.6 percent. Most other local industrial estates are less than 12 ha in size.
- 6.29 One third of the 22 Areas are fully occupied, with the average occupancy rate standing at 84.3 percent. Excluding the decommissioned Aberthaw Power Station, the next lowest occupancy rate is seen at Llandow Trading Estate which has only 52 percent of its units occupied. However, this Estate mostly comprises open storage plots whose occupancy it is harder to assess.

Table 21 – Existing Employment Area – Assessment Summaries

Site Ref.	Location	Description	Size, ha	Total Vacant Units	Site Vacancy Rate (%)	Vacant Parcels of Land on Existing Site - Excluding LDP Allocations	Site Scoring, Max 30	Protect in the Next LDP? (Yes/No/Maybe)
MD16.1	Barry Docks	Port facilities bounded by low density industrial development to the north and south	76.88	5	6	<p>1. Wimborne Road, Adjacent 31 Berth - Sited located to the northern boundary of Barry Port with access provided via Wimborne Road. The site comprises scrub land with potential use as either an open storage site or development site (design and build opportunities). Clearance/remedial works required prior to occupation. (0.65 ha)</p> <p>2. Atlantic Crescent, Unit 19 and Coal Yard - Located centrally within Barry Port, the site comprises a large parcel of land capable of sub-division to provide smaller storage / development plots. Specification varies throughout (part fenced, with surface specification ranging from unsurfaced (majority) to part cleared / scrub in part, with small sections of compacted hardcore). Clearance / remedial works required prior to occupation. (21.0 ha)</p> <p>3. Land at David Davies Road - Gated site fronting onto David Davies Road. No services are presently connected to the site. Surface specification is predominantly hardcore, the land itself is fenced to the perimeter. (0.45 ha)</p> <p>4. Land at Windward Terminal - Comprises a site that is fenced, surfaced and has power and water connected. (1.73 ha)</p>	17	Yes
MD16.2	The Chemical Complex	Major chemical complex for Dow Chemicals dispersed over multiple sites and a wide geographic area	118.49	4	17	<p>Land at Hayes Road (CF64 5RZ) - Large area of mostly vacant land in the south of the Complex, adjacent to Tŷ Hafan Children's Hospice. The land is on the market for sale or to let. The site is split into three separate irregular shaped plots. These are available individually or combined.</p> <ul style="list-style-type: none"> Plot One - 7.187 ha. Land which is unsurfaced and overgrown with vegetation. Plot Two - 7.605 ha. Predominately surfaced land with a detached industrial/warehouse unit located to the western boundary of 6,759 sqm Plot Three - 4.634 ha. Surfaced yard with a detached industrial/warehouse on the northern boundary of 6,060 sqm. 	16	Yes

Site Ref.	Location	Description	Size, ha	Total Vacant Units	Site Vacancy Rate (%)	Vacant Parcels of Land on Existing Site - Excluding LDP Allocations	Site Scoring, Max 30	Protect in the Next LDP? (Yes/No/Maybe)
MD16.3	Atlantic Trading Estate	Large industrial estate with a wide mix of unit sizes and qualities, and a number of high quality new developments occurring	15.06	36	26	None - Infill plots as identified in the LDP	15	Yes
MD16.4	Palmerston Trading Estate	A medium sized industrial site with a number of smaller terraced units, within the Barry urban area	2.04	10	24	None	18	Yes
MD16.5	Sully Moors Road Industrial Estate	A small industrial estate dominated by engineering and motor repair businesses	3.15	2	18	None - Vacant land in the south of the site forms part of a large electricity transformer facility, owned by Western Power Distribution.	22	Yes
MD16.6	Ty Verlon Industrial Estate	Large industrial estate with a wide mix of unit sizes including some large units for large employers who include Masons Self Storage and Bakers Baguettes	11.24	6	9	None	25	Yes
MD16.7	Cardiff Road Business Park	A medium sized industrial estate with large building suppliers on the frontage (Topps Tiles and Howdens) and smaller low quality terraces behind.	3.29	10	32	None - Open land in use by multiple businesses	18	Yes
MD16.8	Vale Enterprise Centre	A small site with a mixture of office and industrial uses in a large historic factory/office complex which has been converted and sub divided, with significant areas of vacant space.	1.82	9	22	Hardstanding Fronting buildings and to the North - Around half the site comprises hardstanding which appears unused and could support infill development. It is owned by ABP and leased to St Modwen Developments. (0.86 ha)	15	Yes

Site Ref.	Location	Description	Size, ha	Total Vacant Units	Site Vacancy Rate (%)	Vacant Parcels of Land on Existing Site - Excluding LDP Allocations	Site Scoring, Max 30	Protect in the Next LDP? (Yes/No/Maybe)
MD16.9	St Hilary Court	Two modern office properties within a largely retail service area off the A48. Peter Allen is a large employer while several companies work out of the other building including Hafod.	1.16	0	0	None	25	Yes
MD16.10	Llandough Trading Estate	Modern Industrial estate accessible off the A4232, within a larger industrial area on the western fringe of Cardiff.	5.34	5	19	None	24	Yes
MD16.11	West Point Industrial Estate	The site contains rows of small modern terraced units underneath a highway overpass. Accessible off the A4232, within a larger industrial area on the western fringe of Cardiff.	5.33	2	5	None	25	Yes
MD16.12	Cardiff Airport Business Park	The site hosts civilian airport and terminal facilities as well as a maintenance facility for BA. Meanwhile the Airport Business Park is a small business park of only two units with one unit being a large facility for Dnata who provide airport catering while the other provides aircraft tool hire. Site is within a wider Enterprise Zone.	210.88	0	0	Whole area falls into the allocated Enterprise Zone	28	Yes
MD16.13	MOD St Athan	Large site hosting a Ministry of Defence facility, an aircraft maintenance facility and an Aston Martin manufacturing facility. Site comprises a diverse range of hanger, office and industrial/warehouse facilities, both modern and historic, within a wider Enterprise Zone.	331.75	0	0	Whole area falls into the allocated Enterprise Zone	25	Yes
MD16.14	Aberthaw	The site is home to a decommissioned coal-fired and	45.87	6	100	Whole Site - As is discussed elsewhere the whole	14	Yes

Site Ref.	Location	Description	Size, ha	Total Vacant Units	Site Vacancy Rate (%)	Vacant Parcels of Land on Existing Site - Excluding LDP Allocations	Site Scoring, Max 30	Protect in the Next LDP? (Yes/No/Maybe)
	Power Station	biomass-fired power station and a large ash pile, on a coastal location in the Vale. Site is in the process of being purchased by Cardiff Capital Region (CCR), with the goal to redevelop the site for a strategic employment site				site is subject to long term proposals for redevelopment. (45.87 ha)		
MD16.15	Aberthaw Cement Works	Large scale operational cement works for Tarmac, located in a rural area	16.84	0	0	None - All land in use.	17	Yes
MD16.16	Heritage Business Park	Small rural industrial site dominated by motor industry and engineering businesses	1.79	0	0	None - Open land on the site is in use by Llantwit Major Self Storage	19	Yes
MD16.17	Llandow Trading Estate	A medium sized industrial site located in a rural area, accessed via a narrow road off the B4270.	11.5	24	48.00	Whole Area - The site owner has indicated that it would be open to the sale or letting of the whole Trading Estate to a developer for redevelopment. The owner does not have the finance to improve the estate directly. (11.50 ha)	8	Yes
MD16.18	Vale Business Park	Large rural industrial estate with units in a range of sizes	28.29	7	5.83	Brownfield Plot in South of the Business Park - Area comprising the foundations of a cleared building and surrounding landscaping. The land is owned by LEL Properties and leased to Elete Design. It represents the only large infill plot on the Business Park, other than the LDP sites. (1.20 ha)	23	Yes
MD16.19	Dyffryn Business Park	Three large units, formerly aircraft hangars, in a rural business park with only one in substantial use. The site is located just off the B4270	6.33	0	0	None - Modest infill opportunities might exist but most land around the hangars is in use for open storage.	20	Yes
MD16.20	West Winds	Rural business park with five medium sized units	0.47	1	14.29		28	Yes

Site Ref.	Location	Description	Size, ha	Total Vacant Units	Site Vacancy Rate (%)	Vacant Parcels of Land on Existing Site - Excluding LDP Allocations	Site Scoring, Max 30	Protect in the Next LDP? (Yes/No/Maybe)
	Industrial Estate	located only 6km from M4 junction 35.				None, expansion not possible without encroaching on the surrounding countryside		
MD16.21	Renishaw	Single large manufacturing facility for Renishaw located off the M4, junction 34	11.58	0	0	Expansion plans as identified in the LDP	30	Yes
MD16.22	Llandow South	Two large units in a rural area, housing Enava The Waste Paper Co.	4.79	0	0	None, site in full use	13	Yes

Source: Vale of Glamorgan Council/BE Group, 2022

- 6.30 Occupancy rates of 90-100 percent can be considered high, giving little choice to businesses, while rates of 70 percent or less suggest excess capacity in the stock, possibly coupled with issues of quality in the supply. All but one of the Employment Areas thus have a high occupancy rate allowing for the natural churn over of businesses expanding/contacting and relocating within the Vale.
- 6.31 Vacant parcels of land were reviewed in each existing Employment Area, excluding land already allocated for employment development in the adopted LDP, and discussed above. As was the case in the 2013 Study, most available employment land, outside of existing LDP Allocations, comprises low grade plots at MD16.1: Barry Docks and MD16.2: The Chemicals Complex.
- 6.32 As was discussed previously, MD16.14: Aberthaw Power Station will be redeveloped to become an employment site later in the RLDP period. Over the long term MD16.17: Llandow Trading Estate may also become available for redevelopment, for uses judged appropriate by planning policy, although most land is in use for open storage at present and attracting a development partner to this relatively isolated rural location would likely be challenging.
- 6.33 In Table 22, the 21 Employment Areas are grouped into categories, as set out in the SEWSPG Methodology, to reflect their quality and importance for the Vale of Glamorgan and the Cardiff Capital Region.

Table 22 – Employment Area Hierarchy

Type	Typical Characteristics	Typical Importance	Employment Areas
Major Employment Site	Typified by large areas of land capable of accommodating a variety of uses. Sites are predominantly key development areas of a sufficient scale and location attracting individuals and investment from a wide catchment area, whilst affording access to regional/sub-regional markets. Sites are typically occupied by large renowned companies who are features of the national/international markets.	Sites of larger than local Authority-wide importance	MD16.1 – Barry Docks MD16.2 – The Chemical Complex MD16.12- Cardiff Airport Business Park MD16.13 – MOD St Athan MD16.14 – Aberthaw Power Station MD16.15 – Aberthaw Cement Works MD16.21 - Renishaw

Type	Typical Characteristics	Typical Importance	Employment Areas
Secondary Employment Sites	Sites typically have a variety of employment uses and tend to draw individuals and investment from within the local authority area. There may be a small presence of national companies within these estates however established larger local businesses tend to predominate.	Sites of Local Authority-wide Importance	MD16.3 – Atlantic Trading Estate MD16.6 – Ty Verlon Industrial Estate MD16.10 – Llandough Trading Estate MD16.11 – West Point Industrial Estate MD16.18 – Vale Business Park, Llandow
Key Local Employment Sites	Sites of significance in the local context, offering important local employment opportunities. Sites are typified by a local SME/start-up presence and will usually have the space to allow such businesses to grow and expand in the short-medium term.	Sub-local Authority Employment Sites	MD16.4 – Palmerston Trading Estate MD16.5 – Sully Moors Road Industrial Estate MD16.7 – Cardiff Road Business Park MD16.9 – St Hilary Court MD16.16 – Heritage Business Park MD16.17 – Llandow Trading Estate MD16.19 – Dyffryn Business Park MD16.20 – West Winds Industrial Estate MD16.22 – Llandow South
Neighbourhood Employment Sites	Such sites provide employment opportunities for members of the surrounding communities. These sites are typically small in scale and contain a small number of businesses. Such businesses tend to serve the immediate area and do not have a wide catchment. This definition extends to include small rural employment sites.		MD16.8 – Vale Enterprise Centre

Source: BE Group, 2022

Summary

- 6.34 This assessment of the employment land supply in the Vale of Glamorgan revealed that realistically available land within the Vale as of summer 2022 comprised 177.54 ha net (205.91 ha gross). This included 139.14 ha net (167.51 ha gross) of strategic employment land and 38.40 ha (net and gross) of local employment land and reflects:
- Good prospects of delivery on the Land to the South of Junction 34 M4 Hensol
 - That some 61.05 ha is likely to be brought forward on the Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone) and another 48.5 ha is likely to be delivered at Aerospace

Business Park, St Athan Rhoose (part of Cardiff Airport – Bro Tathan Enterprise Zone over the RLDP period

- That after a range of recent, mostly industrial developments in Barry, 19.36 ha remains available in the town, on sites presently allocated for B-Class uses in the existing LDP or linked to planning consents
- The unlikelihood of development on Llandow Trading Estate without a major external investment.

6.35 Given this good evidence of deliverability it is assumed that all of this realistically available supply will be developed over the RLDP period to 2036.

6.36 In terms of geography, the development of Land to the South of Junction 34 M4 Hensol provides the opportunity for a strategic scale industrial/warehouse scheme on the M4 Corridor, something the Vale is noticeably lacking. If future development at the Aerospace Business Park, St Athan, Rhoose follows past trends, the remaining 48.5 ha of net employment land at the Eastern Zone will be taken up relatively early in the RLDP period for a number of specialist uses. The Land adjacent to Cardiff Airport and Port Road, Rhoose offers a more general opportunity to attract high value businesses, from a range of sectors, building on advantages including the proposed new College facilities and the presence of the Airport. The Land adjacent to Cardiff Airport and Port Road is also expected to come forward over a longer timeframe than the other two strategic sites, providing strategic development land, to market to inward investors, up to 2036.

6.37 Converting the realistic employment land supply into jobs indicates that the 177.54 ha could support up to 13,978 jobs. Some 21.6 percent of these jobs would be from the local supply, 3,019, and the remainder, 10,959, from the strategic supply.

6.38 A review of Vale of Glamorgan's 22 identified Employment Areas indicates that most are established industrial areas, with property offers focused on B2 stock. There is good mix of locally and sub-regionally focused Employment Areas, all of which are well occupied, offering limited space for business growth or inward investment.

7.0 FUTURE LAND REQUIREMENTS REVIEW

Introduction

7.1 The Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan' 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 and population change. Neither approach provides a definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and they are considered in the context of the market overview undertaken as part of this study.

7.2 The two models are:

- Practice Guidance Method 1: Past Building Completions
This reviews the actual take-up of employment land and premises in the Vale over time.
- Practice Guidance Method 2: Labour Demand Forecasting
This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on jobs to floorspace density, which in turn can be translated into the projected land need. This scenario uses as its base updated economic forecasts (March 2022), produced by Oxford Economics for the Vale of Glamorgan. This latest forecast accounts for recent macro-economic changes, particularly the implications of Brexit as they are presently understood, the impact of inflation and the projected long term impacts of the Covid-19 Pandemic on the local economy. The assumptions used in the forecasts are summarised in Appendix 5.

Resident Workforce Forecast: A variation on Method 2, this uses the same method of forecasting as the Labour based method but takes forecast changes in the working population i.e., labour supply, rather than jobs – labour demand. It uses, as its base, ten scenarios of population change which, at the time of writing are preferred measures of growth/decline in the Vale of Glamorgan:

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. Sensitivity testing against actual land take-up is undertaken to assess how the two trends in the Vale of Glamorgan 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 It should be noted that these are ‘policy-off’ scenarios in that they do not account for any strategic policy initiatives. At present there are no major policy programmes, such as Enterprise Zones, in the Vale of Glamorgan, with clearly defined jobs growth targets which could inform a ‘policy-on’ scenario.

Practice Guidance Method One: Past Building Completions

- 7.6 Take up data is available for the period 1996-2021, (i.e., 25 years), from a variety of sources:
- Between 1996 and 2007 annual employment land take up was recorded by the Council. This identified a total of 56.8 ha of B Use Classes land being built out, of which 11.7 ha related to the development by Bosch (now Renishaw) and was considered as a ‘one-off’ strategic commitment for South Wales. Between 2007 and 2011, take-up of employment land for the Vale has been sourced from the annual returns supplied by the Council to the now disbanded South East Wales Economic Forum. The returns indicate there was no further take-up during these four years This data was used to inform BE Group’s 2013 Vale of Glamorgan Employment Land and Premises Study.
 - Over the succeeding period 2013-2021, the Council has provided data which indicates that 27.86 ha of employment land had been taken up. Within this, 25.90 ha (93.0 percent) of the recorded take up was at the strategic Bro Tathan Business Park, St. Athan mostly related to the development of Aston Martin Lagonda’s facilities here.
- 7.7 Table 23 accordingly sets out the take up rates by year, considering strategic/local development and local only completions.

Table 23 – Vale of Glamorgan Employment Land Take Up, By Year, Hectares

	Local/Strategic Take Up	Local only Take Up	Comments
1996-2007	56.80	45.10	Local figure excludes 11.7 ha at Renishaw
2007-2013	0	0	-
2013-2021	27.86	1.96	Local figure excludes 25.90 ha of take up at Bro Tathan
Total	84.66	47.06	-
Average Annual Take Up Rates	3.39	1.88	-

Source: Vale of Glamorgan Council and BE Group, 2022

- 7.8 Using these take-up rates and applying them to the period 2021-2036 (15 years) allows two forecast scenarios of Past Completions to be made (see Table 24).

Table 24 – Past Building Completions Forecast

Forecast Scenarios	Annual Average Employment Completions, ha	2021-2036 Land Requirement, ha
Scenario One: Local/Strategic Take Up	3.39	50.85
Scenario Two: Local only Take Up	1.88	28.20

Source: Vale of Glamorgan Council and BE Group, 2022

- 7.9 Broadly, Scenario One provides the most rounded picture of development needs in the Vale, reflecting the dominance of strategic sites in the Vale's economy and the fact that most development, since 2013 at least, has occurred in at the Enterprise Zone, with further growth expected to be focused here and at Land to the South of Junction 34 M4 Hensol.
- 7.10 The Vale should also have a minimum buffer of five years supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period. Based on the historic take-up trend this would generate a further land need of 9.40-16.95 ha, i.e.
- Scenario One: Scenario One: Local/Strategic Take Up: 3.39 ha x 5 years = 16.95 ha
 - Scenario Two: Local only Take Up: 1.88 ha x 5 years = 9.40 ha

- 7.11 Added to the 2021-2036 need figure, this increases the requirements to:
- Scenario One: Local/Strategic Take Up: 50.85 ha + 16.95 ha = **67.80 ha**
 - Scenario Two: Local only Take Up: 28.20 + 9.40 ha = **37.60 ha**

Practice Guidance Method One – Jobs Capacity of the Need

- 7.12 It is possible to estimate the number of jobs which the quantum of land required in Model One, Scenarios One/Two could generate (see Tables 25-28). Doing this requires a number of assumptions to be made however, as were undertaken for the realistic employment land supply in Section 6.0:
- To split the total need by Use Class: In the Vale it is assumed that the majority of development to 2036 will be for industrial and warehouses uses, reflecting recent development patterns. Some office uses are likely, reflecting forecast jobs growth, but these are expected to be small scale and take up only limited land.
 - To convert the land need (hectares), to floorspace (sqm); It is assumed that each hectare of land would support 4,000 sqm of floorspace or 40 percent site coverage. This reflects standards in the Welsh Planning Practice Guidance Note ‘Building an Economic Development Evidence Base to Support a Local Development Plan’
 - Convert the floorspace into jobs: Average jobs densities for office and industrial/warehouse uses, for Wales, from ‘Building an Economic Development Evidence Base to Support a Local Development Plan’ are used.

Table 25 – Scenario One: Local/Strategic Take Up: Employment Land Need to 2036, Split by Use Class and including a Buffer

Factor	Use Class (Site Area Attributed to Use Class, hectares)				Totals (ha)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
Percentage Split, by Use Class*	10	10	40	40	100
Scenario One: Local/Strategic Take Up. Total Need, Including a Buffer	6.78	6.78	27.12	27.12	67.80

Source: BE Group, 2022

*Proportionate division of the need 2021-2036, by Use Class. It assumes the majority of development to 2036 will be for industrial and warehouses uses, reflecting recent development patterns. Some office uses are likely, reflecting forecast jobs growth, but these are expected to be small scale and take up only limited land.

Table 26 – Scenario One: Local/Strategic Take Up: Conversion of the Above Employment Land Need to Jobs

Factor	Use Class (Floorspace and Jobs by Use Class)				Totals (sqm or jobs)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
Conversion of Land to sqm*	27,120	27,120	108,480	108,480	271,200
Standard Densities (sqm per job)**	16	67	67	67	-
Resultant Employment Capacity	1,695	405	1,619	1,619	5,338

Source: BE Group, 2022

*Assumes 4,000 sqm per hectare or 40 percent site coverage, reflecting the Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan'

**Based on Jobs Densities set out in 'Building an Economic Development Evidence Base to Support a Local Development Plan'

Table 27 – Scenario Two: Local only Take Up: Employment Land Need to 2036, Split by Use Class and including a Buffer

Factor	Use Class (Site Area Attributed to Use Class, hectares)				Totals (ha)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
Percentage Split, by Use Class*	10	10	40	40	100
Scenario One: Local/Strategic Take Up. Total Need, Including a Buffer	3.76	3.76	15.04	15.04	37.60

Source: BE Group, 2022

*Proportionate division of the need 2021-2036, by Use Class. It assumes the majority of development to 2036 will be for industrial and warehouses uses, reflecting recent development patterns. Some office uses are likely, reflecting forecast jobs growth, but these are expected to be small scale and take up only limited land.

Table 28 – Scenario Two: Local only Take Up: Conversion of the Above Employment Land Need to Jobs

Factor	Use Class (Floorspace and Jobs by Use Class)				Totals (sqm or jobs)
	B1(i)	B1(iii)	B2	B8	
	Offices	Light Industrial	Manufacturing	Warehousing	-
Conversion of Land to sqm*	15,040	15,040	60,160	60,160	150,400
Standard Densities (sqm per job)**	16	67	67	67	-
Resultant Employment Capacity	940	224	898	898	2,960

Source: BE Group, 2022

*Assumes 4,000 sqm per hectare or 40 percent site coverage, reflecting the Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan'

**Based on Jobs Densities set out in 'Building an Economic Development Evidence Base to Support a Local Development Plan'

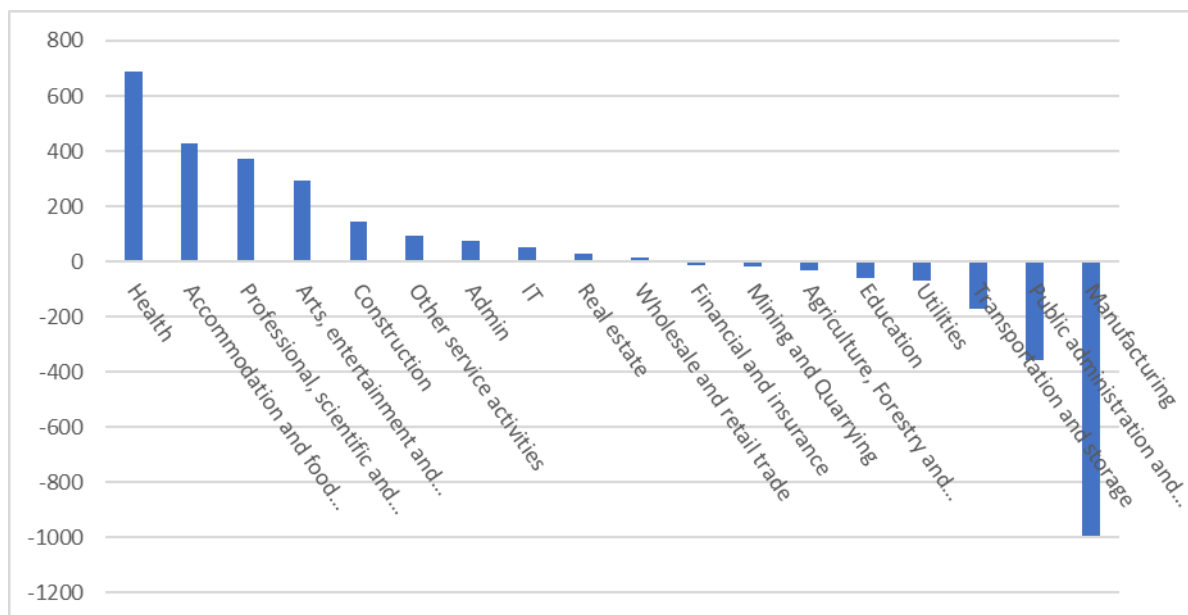
7.13 Converting the land into jobs indicates that the 67.80 ha of Scenario One: Local/Strategic Take Up could support 5,338 jobs while the 37.60 ha of Scenario Two: Local only Take Up could support 2,960 jobs. **It is important to emphasise that these are estimates of the number of jobs the new employment land could support (capacity) not forecasts of future jobs growth in the Vale.** This jobs capacity of up to 5,338 jobs could meet the all the extra jobs growth forecast by Oxford Economics (See Practice Guidance Method Two A: Labour Demand Forecasting) and 100 percent of the jobs growth forecast in seven of the nine projections of population and jobs change set out in Practice Guidance Method Two B: Resident Workforce Forecast below. However, it should also be noted that the potential jobs growth against the total of strategic and local sites is 13,978 jobs, therefore the projected employment growth of 5,338 could be higher should the delivery of employment sites be greater than the baseline need.

Practice Guidance Method Two A: Labour Demand Forecasting

7.14 This scenario uses as its base the Oxford Economics forecast modelling. The forecasts project employment change over 2021-2036 and include annual employment figures for the Vale from 1991. The forecasts can be used to calculate the future need, and the past jobs change can be used to calculate the assumed land need over that period for comparison with the historic take-up over the same period.

- 7.15 Over the 2021-2036 period, the Vale of Glamorgan is projected to add 463 jobs, a 0.96 percent increase, from 48,407 in 2021 to 48,870 in 2036. Forecasting suggests the economy will grow gradually after the 2020/21 Covid-19 Pandemic with employment in the Vale increasing on average 0.47 percent/year until 2026. However, the number of jobs will only surpass pre-Pandemic levels of 49,433 (observed in 2019) in 2025 when the number of jobs will reach 49,436. Then in 2027 the number of jobs will peak at 49,798, after which the economy will gradually shrink, losing 0.21 percent of the workforce annually.
- 7.16 As Figure 9 shows, the modest increase in employment to 2036 will be focused in the Health (687 extra jobs) and Accommodation and Food Services sectors (428 extra jobs). Of the sectors which would require B-Class premises, significant growth only is forecast in Professional, scientific and technical activities (373 extra jobs) and Construction (143 extra jobs). Projected growth in other office sectors is negligible or slightly negative.
- 7.17 This growth is largely offset by a projected loss of 996 jobs in the manufacturing sector, alongside 360 jobs in Public administration. More surprisingly, a modest loss of 173 jobs in Transportation and storage is forecast suggesting that the Vale will not derive significant benefits from the present growth in the logistics sector.
- 7.18 The forecast does accord with recent trends in jobs change locally. As was discussed in Section 3.0, since 2015, office sector growth has been focused in Professional, scientific and technical and Business administration and support services. The Construction sector saw good growth while the Manufacturing sector loss 1,000 jobs to 2020. A loss of 400 manufacturing jobs over 2011-2026 was also projected in the Oxford Forecasting in the 2013 Employment Land and Premises Study, a level of sectoral decline which already seems to have been exceeded.

Figure 9 – Forecast Proportional Change in Employment, 2021-36



Source: Oxford Economics, 2022

7.19 This section now deals with the calculation of future needs using this data.

7.20 The forecasts break down employment to the level of 18 industry sectors (Table 23) although not all are relevant to this Employment Land Review, particularly agriculture, forestry and fishing.

7.21 Using the Oxford Economics forecasts, BE Group have forecast employment floorspace and employment land requirements for the Vale of Glamorgan. Reflecting Welsh Practice Guidance, the methodology of calculating this requirement is as follows:

- Identify which industry sectors are likely to take up employment land, including the proportion of that sector's employment on B-class employment land (Table 29)
- Adopt appropriate employment densities to convert employment numbers to floorspace demand (see Table 30)
- Adopt a plot ratio to convert floorspace to employment land demand (see Table 30).

Table 29 – Labour Demand Forecast, 2021-2036

Broad Sector Groupings	Jobs, Split by Sector 2021-2036	Land Use	Weighting	Jobs, Split by Sector 2021-2036	Jobs, by use, which <i>Do Not</i> Require B-Class Premises. 2021-2036
Non B-Class Uses					
Agriculture, Forestry and Fishing	-34	Non B	-	-	-34
Mining and Quarrying	-19	Non B	-	-	-19
Wholesale and retail trade; repair of motor vehicles and motorcycles	15	Non B	-	-	15
Accommodation and food service activities	428	Non B	-	-	428
Arts, entertainment and recreation	292	Non B	-	-	292
Total	682			-	682
B1 Mostly Office Uses					
Administrative and support service activities	76	B1	1	76	-
Information and Communication	49	B1	1	49	-
Professional, scientific and technical activities	373	B1	1	373	-
Real estate activities	28	B1	1	28	-
Financial and Insurance Activities	-14	B1	1	-14	-
Public administration and defence; compulsory social security	-360	B1	0.22	-79	-280
Human health and social work activities	687	B1	0.22	151	536
Education	-61	B1	0.22	-13	-48
Other service activities	95	B1	0.22	21	74
Total	874	-	-	592	282
B2/B8 Uses					
Manufacturing	-996	B2	1	-996	-
Utilities	-67	B2	0.26	-18	-50
Construction	143	B2	0.26	37	106
Transportation and storage	-173	B8	0.48	-83	-90
Total	-1,094	-	-	-1,060	-34

Source: BE Group and Oxford Economics, 2022

Table 30 – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 592 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
12 sqm per worker	7,104	1.78
16 sqm per worker	9,472	2.37
20 sqm per worker	11,840	2.96

Industrial (B2/B8)	Based on 1,060 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
50 sqm per worker	-53,000	-13.25
67 sqm per worker	-71,020	-17.76
85 sqm per worker	-90,100	-22.53

Source: BE Group, 2022

7.22 The land need figures are based on a plot ratio of 40 percent.

7.23 A 40 percent plot ratio would, as noted in Welsh Practice Guidance, be standard for development on modern industrial estates and business parks, with other land used for car parking, landscaping, open storage and the 40 metre turning circle HGVs require. A higher, normally up to 80 percent, plot ratio would normally be applied only to town or city centre schemes, mostly multi-storey offices. It is expected that most new space in the Vale of Glamorgan will be provided in extensions to industrial estates/business parks, or at the Enterprise Zone, at traditional densities.

7.24 For each use, offices (B1) and industrial (B2/B8), three employment density levels (the amount of floorspace required for each job) are considered. Comments on these density options are provided:

Offices

- 12 sqm per worker – Would be applicable to a quite high-density service sector operation such as a call centre or town centre financial services office. Such facilities are relatively rare in the Vale of Glamorgan, where most B1 office activity occurs with lower density industrial estates/business parks
- 16 sqm per worker – A mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as a current average floorspace/worker rate for office uses in Wales. It reflects a mix of town centre and business park density levels.
- 20 sqm per worker – A comparably low employment density, reflective of more specialist facilities such as design studios, co-working and maker spaces. These have a limited presence in the Vale of Glamorgan.

Industrial

- 50 sqm per worker – This high density relates to B1 light industrial uses, which are found throughout the employment areas of in the Vale of Glamorgan but does not allow for larger B2/B8 options.
- 67 sqm per worker – A mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as a current average floorspace/worker rate for industrial/warehouse uses in Wales. It allows for a mix of high-density light industrial and mid-density B2/B8 uses.
- 85 sqm per worker – This low-density level would be most applicable to the largest B8 logistics facilities and National and Regional Distribution Centres. In the Cardiff Capital Region these are mostly found along the M4 Corridor.

7.25 Based on the above, the recommended land needs for Model Two are thus:

- B1 Offices – 592 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 2.37 ha
- B2/B8 Industrial – 1,060 *less* jobs at 67 sqm per worker and a 40 percent plot ratio = -17.76 ha
- Total net need = **-15.39 ha**

7.26 The above model suggests that in the Vale of Glamorgan requires no employment land to 2036 and, indeed, could reuse some industrial land for other uses.

7.27 However, in terms of B1/B2/B8 land, if the loss of manufacturing jobs is discounted and only sectors predicted to gain jobs are considered (698 extra B1 jobs, 37 extra B2 jobs) the need becomes:

- B1 Offices – 698 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 2.79 ha
- B2/B8 Industrial – 37 extra jobs at 67 sqm per worker and a 40 percent plot ratio = 0.62 ha
- Total net need = **3.41 ha.**

Comparing Methods One and Two

7.28 In reality, the change in employment numbers shown in Method Two does not translate exactly to land provision in the way shown. 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:

- While forecasting suggests net declines in B2/B8 jobs locally and indeed manufacturing employment does seem to have declined since 2015, the market assessment completed in this Study suggests that demand is overwhelmingly for industrial and warehouse space, while office requirements are modest
- The low jobs growth forecast for Model Two is largely driven by the forecast loss of manufacturing jobs, as noted. This forecast decline reflects a disaggregation of UK/Welsh trends and does not account for local factors which may contradict wider trends, such as specific investment into the Enterprise Zone, growth of port related activities or the expansion of Renishaw
- Will the decline in jobs lead to the release of land? 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
- Land take-up/property needs can be for different reasons such as modernisation or geographic relocation, or land banking for future needs.
- The impacts of the Covid-19 Pandemic on the office sector which appear to include increased split office and home working for workers and lower density working environments
- Expansion may also be within existing premises or on expansion land not accounted for in land allocations.

7.29 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 the period 1996-2021 and compared to the actual land take-up during that period (see Tables 31 and 32).

Table 31 – Employment Land Take-Up/Employment Change Comparison

Broad Sector Groupings	Difference (jobs) 1996-2021	Land Use	Weighting	Jobs, Split by Sector 1996-2021	Jobs, by use, which <i>Do Not</i> Require B-Class Premises. 1996-2021
Non B-Class Uses					
Agriculture, Forestry and Fishing	-7	Non B	-	-	-7
Mining and Quarrying	-6	Non B	-	-	-6
Wholesale and retail trade	-1711	Non B	-	-	-1711
Accommodation and Food Services	766	Non B	-	-	766
Arts, entertainment and recreation	712	Non B	-	-	712
Total	-246				-246
B1 Mostly Office Uses					
Administrative and support service	-425	B1	1	-425	-
Information and Communication	440	B1	1	440	-
Professional, scientific and technical activities	2429	B1	1	2,429	-
Real estate activities	507	B1	1	507	-
Financial and Insurance Activities	-328	B1	1	-328	-
Public Administration	-1790	B1	0.22	-394	-1396
Health	525	B1	0.22	115	409
Education	1007	B1	0.22	221	785
Other service activities	93	B1	0.22	21	73
Total	2,458	-	-	2,587	-129
B2/B8 Uses					
Manufacturing	-2339	B2	1	-2,339	-
Utilities	-47	B2	0.26	-12	-35
Construction	971	B2	0.26	252	718
Transport and Storage	876	B8	0.48	420	456
Total	-538	-	-	-1,678	1139

Source: BE Group, 2022 and Oxford Economics, 2022

Table 32 – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 2,587 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
16 sqm per worker	41,390	10.35
Industrial (B2/B8)	Based on 1,678 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
67 sqm per worker	-112,426	-28.11
Net Needs	-71,036	-17.76
<i>Take Up 1996-2021</i>	-	84.66 (47.06 local only)

Source: BE Group, 2022

7.30 The trend shows that net jobs growth is not an accurate method of calculating land. Forecasting suggests that over 1996-2021 the Vale of Glamorgan should have gained 10.35 ha of B1 office land but lost 28.11 ha of B2/B8 land, a substantial net loss of B-Class land. In reality, 47-85 ha of completions were recorded, the vast majority being for industrial and warehousing premises. **This calculation reinforces the view that historic take-up is the most appropriate method.**

Practice Guidance Method Two B: Resident Workforce Forecast

7.31 As part of the RLDP development process, the Council has identified nine preferred scenarios for projecting population growth in the Vale:

- WG-2014: Replicates the WG 2014-based Principal population projection, using historical population evidence for 2001–2014.
- WG-2018: Replicates the WG 2018-based Principal population projection, using historical population evidence for 2001–2018.
- WG-2018-HIGHPOP: Replicates the WG 2018-based High population projection, using historical population evidence for 2001–2018 and incorporating high fertility, mortality and migration assumptions.
- WG-2018-LOWPOP: Replicates the WG 2018-based Low population projection, using historical population evidence for 2001–2018 and incorporating low fertility, mortality and migration assumptions.
- PG-5Y: Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 5-year historical period (2015/16–2019/20)
- PG-Long Term: Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 19-year historical period (2001/02–2019/20)
- PG-10Y: Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 10-year historical period (2010/11–2019/20)
- Dwelling-led 5Y: Models the population impact of an average annual dwelling growth of +698 dwellings/year, based on a 5-year history of housing completions in the Vale of Glamorgan (2017/18–2021/22)
- Dwelling-led 10Y: Models the population impact of an average annual dwelling growth of +553 dwellings per annum (dpa), based on a 10-year history of housing completions in the Vale of Glamorgan (2012/13–2020/21)
- Employment-led OE: Models the population growth impact of an average employment growth of +25 per year for the Vale of Glamorgan, as implied by the Oxford Economics forecast.

7.32 Table 33 summarises the outputs of those ten Scenarios.

7.33 Key for this Study are the estimates of the additional jobs generated by the projections of population and household change. The labour force and employment growth implications of each scenario are estimated through the application of economic activity rates, an unemployment rate and a commuting ratio. The ten Scenarios forecast additional jobs rates for 2021-2036 ranging a decrease of 1,890, to an increase of 7,395.

Table 33 – Vale of Glamorgan Population Growth Scenarios 2021-2036 and Resulting Jobs Generation

Option	Scenario	Population and Household Change 2021-2036					Dwelling Requirement		Employment Growth	
		Population Change 2021-2036	Population Change, Percent	Household Change 2018-2033	Household Change, Percent	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036
1. Welsh Government 2014 Projections	Replicates the WG 2014-based Principal population projection, using historical population evidence for 2001–2014	13	0.0	2,182	3.9	64	151	2,265	-126	-1,890
2. Welsh Government 2018 Projections	Replicates the WG 2018-based Principal population projection, using historical population evidence for 2001–2018.	9,787	7.3	6,214	10.6	851	431	6,465	243	3,645
3. Welsh Government 2018 Projections HIGHPOP	Replicates the WG 2018-based High population projection, using historical population evidence for 2001–2018, incorporating high fertility, mortality, and migration assumptions.	13,127	9.7	7,500	12.7	938	520	7,800	292	4,380
4. Welsh Government 2018 Projections LOWPOP	Replicates the WG 2018-based Low population projection, using historical population evidence for 2001–2018, incorporating low fertility, mortality and migration assumptions.	5,172	3.8	4,559	7.8	759	316	4740	191	2,865
5. PG-Y5	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 5-year historical period (2015/16–2019/20).	16,923	12.4	9,187	15.4	1,222	637	9,555	426	6,390
6.PG-Long Term	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 19-year historical period (2001/02–2019/20).	8,561	6.3	5,705	9.6	739	396	5940	210	3,150

6A. PG-10Y	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 10- year historical period (2010/11–2019/20)	8,519	6.3	5,695	9.6	741	395	5,925	197	2,955
7. Dwelling-led 5Y	Models the population impact of an average annual dwelling growth of +698 dwellings per annum (dpa), based on a 5-year history of housing completions in the Vale of Glamorgan (2017/18–2021/22).	19,048	13.9	10,062	16.9	1,360	698	10,470	493	7,395
8. Dwelling-led 10Y	Models the population impact of an average annual dwelling growth of +553 dwellings per annum (dpa), based on a 10-year history of housing completions in the Vale of Glamorgan (2012/13–2020/21).	13,154	9.7	7,587	12.8	1,009	526	7,890	325	4,875
9. Employment- led OE	Models the population growth impact of an average employment growth of +25 per year for the Vale of Glamorgan, as implied by the Oxford Economics forecast.	2,402	1.8	3,041	5.2	367	211	3,165	25	375

Source: Vale of Glamorgan Council, 2023

7.34 It is possible to apply a similar methodology used for Model Two to the Resident Workforce jobs growth figures. To do this the jobs growth figures need to be split by business sector. This is done by applying the same proportional split of sectors as the Oxford Economics jobs forecast for the end of the Plan Period, 2036. This reflects our best estimate of what the economy of the Vale might look like in 2036. The Model Two method can then be applied to identify the floorspace and land need generated by this working age population growth or decline. The Tables for these calculations can be found in Appendix 6.

7.35 The land needed to fully support those ten population growth Scenarios is:

WG-2014

7.36 1,890 *less* jobs would generate a need of:

- B1 Offices – 1,009 less workers at 16 sqm per worker and a 40 percent plot ratio = -1.90 ha
- B2/B8 Industrial – 361 less workers at 67 sqm per worker and a 40 percent plot ratio = -3.26 ha
- Total net need = **-5.16 ha.**

WG-2018

7.37 3,645 additional jobs would generate a need of:

- B1 Offices – 917 additional workers at 16 sqm per worker and a 40 percent plot ratio = 3.67 ha
- B2/B8 Industrial – 375 additional workers at 67 sqm per worker and a 40 percent plot ratio = 6.29 ha
- Total net need = **9.96 ha.**

WG-2018-HIGHPOP

7.38 4,380 additional jobs would generate a need of:

- B1 Offices – 1,237 additional workers at 16 sqm per worker and a 40 percent plot ratio = 4.41 ha
- B2/B8 Industrial – 385 additional workers at 67 sqm per worker and a 40 percent plot ratio = 7.56 ha
- Total net need = **11.97 ha.**

WG-2018-LOWPOP

7.39 2,865 additional jobs would generate a need of:

- B1 Offices – 721 additional workers at 16 sqm per worker and a 40 percent plot ratio = 2.88 ha
- B2/B8 Industrial – 295 additional workers at 67 sqm per worker and a 40 percent plot ratio = 4.94 ha
- Total net need = **7.82 ha.**

PG-5Y

7.40 6,390 additional jobs would generate a need of:

- B1 Offices – 1,608 additional workers at 16 sqm per worker and a 40 percent plot ratio = 6.43 ha
- B2/B8 Industrial – 658 additional workers at 67 sqm per worker and a 40 percent plot ratio = 11.02 ha
- Total net need = **17.45 ha.**

PG-Long Term

7.41 3,150 additional jobs would generate a need of:

- B1 Offices – 793 additional workers at 16 sqm per worker and a 40 percent plot ratio = 3.17 ha
- B2/B8 Industrial – 324 additional workers at 67 sqm per worker and a 40 percent plot ratio = 5.43 ha
- Total net need = **8.60 ha.**

PG-10Y

7.42 2,955 additional jobs would generate a need of:

- B1 Offices – 834 additional workers at 16 sqm per worker and a 40 percent plot ratio = 2.97 ha
- B2/B8 Industrial – 260 additional workers at 67 sqm per worker and a 40 percent plot ratio = 5.10 ha
- Total net need = **8.07 ha.**

Dwelling-led 5Y

7.43 7,395 additional jobs would generate a need of:

- B1 Offices – 1,861 additional workers at 16 sqm per worker and a 40 percent plot ratio = 7.44 ha
- B2/B8 Industrial – 762 additional workers at 67 sqm per worker and a 40 percent plot ratio = 12.76 ha

- Total net need = **20.20 ha.**

Dwelling-led 10Y

7.44 4,875 additional jobs would generate a need of:

- B1 Offices – 1,377 additional workers at 16 sqm per worker and a 40 percent plot ratio = 4.91 ha
- B2/B8 Industrial – 429 additional workers at 67 sqm per worker and a 40 percent plot ratio = 8.41 ha
- Total net need = **13.32 ha.**

Employment-led OE

7.45 375 additional jobs would generate a need of:

- B1 Offices – 94 additional workers at 16 sqm per worker and a 40 percent plot ratio = 0.38 ha
- B2/B8 Industrial – 39 additional workers at 67 sqm per worker and a 40 percent plot ratio = 0.65 ha
- Total net need = **1.03 ha.**

7.46 **It is important to note that this represents the employment land requirement specifically from these population and jobs growth scenarios and is not a forecast of OAN for the whole Vale of Glamorgan economy. However, it does illustrate the maximum economic impacts of the projected jobs growth rates of -1,890 to +7,395, to 2036.**

7.47 It is not advisable to combine the outputs from Practice Guidance Method Two B: Resident Workforce Forecast with Practice Guidance Method Two A: Labour Demand Forecasting to gain a 'whole economy' forecast model as this would combine two differing, incompatible models. Method Two A measures the 'demand' for jobs in the Vale and Method Two B the maximum 'supply' of new workers which ideally need to be accommodated in the Vale of Glamorgan's economy. Additionally, the Oxford Forecasting, upon which Method Two A is based, already makes an allowance for population growth, derived from 2018-based population projections, so comparing the two gives some duplication of requirements.

Summary

7.48 The two alternative forecast options have been produced and considered for the period of 2021-2036, reflecting Welsh Government Practice Guidance.

- 7.49 The figures allow for a minimum five-year buffer to allow for choice and potential change in needs during the period as well as providing some accounting for further possible losses in the supply. The realistic land supply, as identified in Section 6.0, is then deducted from gross need. A distinction is made between the realistic local supply of employment land, 38.40 ha, and the strategic supply at the Enterprise Zone and the Land to the South of Junction 34 M4 Hensol, a further 139.14 ha net (i.e., 177.54 ha total strategic/local supply).
- 7.50 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 25 years, onwards to 2036. The strategic modelling now benefits from seven years of take up evidence at Bro Tathan showing the level of completions which can be achieved in the Vale for larger B2/B8 premises, in the contemporary market, when appropriate land is available
- 7.51 As can be seen from Table 34 the Vale does have enough land to meet projected growth under these scenarios.
- 7.52 If employment-based forecasts are taken (Method Two A), then the quantitative surplus is 33.96-53.00 ha. From the market assessment, strength of the manufacturing economy, the specialist nature of the local manufacturing base, and reviewing the historic trends in employment change and land take up, this approach suggests that employment land needs are underestimated. When a comparison of past employment change over the period 1996-2021 is made, actual land take-up is very different, with far less B1 office take up and far more industrial and warehouse take up than is forecast by Oxford Economics.

Table 34 – Land Forecast Models – Summary

Model	Scenario	A: Land Need 2021-2036, ha	B: Flexibility Buffer (five years take-up rate) ha	C: Land Need Incl. flexibility buffer	D: Land Stock 2022, ha (net)	E: Surplus (or Shortfall), ha	Assumptions
Comments on the Table	<i>The models and scenarios for projecting land needs in the Vale, over 2021, as set out in Section 7.0</i>	<i>Baseline Land Need over 2021-2036 (15 years), in hectares derived from the models, as set out in Section 7.0</i>	<i>A Buffer of an additional five years take up to provide businesses with a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period.</i>	<i>A+B=C, the total land need to 2036 comprising the baseline need and five year buffer</i>	<i>The stock of land, both local and strategic employment land available to meet the identified needs, as defined in Paras 6.9-6.11 and Table 17, Pages 95-107, Section 6.0</i>	<i>D-C=E, the surplus or shortfall in employment land which remains once the total need (C) is deducted from the available supply (D)</i>	
Practice Guidance Method One: Past Building Completions	Scenario One: Local/Strategic Take Up	50.85	16.95	67.80	177.54 – Local/Strategic	109.74	Based on historic (25 years) take-up on the local and strategic employment sites and areas of the Vale, equating to 3.39 ha/year
	Scenario Two: Local only Take Up	28.20	9.40	37.60	38.40 – Local Only	0.80	Based on historic (25 years) take-up on only the local employment sites and areas of the Vale, equating to 1.88 ha/year
Practice Guidance Method Two: Labour Demand Forecasting	-	<i>Net Change</i> B1: 2.37 B2/B8: -17.76 Total: -15.39 <i>Growth Only</i> B1: 2.79 B2/B8: 0.62 Total: 3.41	<i>Net Change</i> B1: 0.79 B2/B8: N/A Total: 0.79 <i>Growth Only</i> B1: 0.93 B2/B8: 0.20 Total: 1.13	<i>Net Change</i> B1: 3.16 B2/B8: -17.76 Total: -14.60 <i>Growth Only</i> B1: 3.72 B2/B8: 0.82 Total: 4.54	38.40 – Local Only	<i>Net Change</i> 53.00 <i>Growth Only</i> 33.86	Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors

Source: Vale of Glamorgan CBC/BE Group, 2022

7.53 A further model, Resident Workforce (Demand from New Labour, Method Two B) has been produced which indicates the additional employment land need from ten population scenarios which indicate that the Vale will see the following jobs change:

- WG-2014: -1,890
- WG-2018: 3,645
- WG-2018-HIGHPOP: 4,380
- WG-2018-LOWPOP: 2,865
- PG-5Y: 6,390
- PG-Long Term: 3,150
- PG-10Y: 2,955
- Dwelling-led 5Y: 7,395
- Dwelling-led 10Y: 4,875
- Employment-led OE: 375.

7.54 Method Two B converts these additional/reduced jobs, into an additional land requirement:

- WG-2014: -5.16 ha
- WG-2018: 9.96 ha
- WG-2018-HIGHPOP: 11.97 ha
- WG-2018-LOWPOP: 7.82 ha
- PG-5Y: 17.45 ha
- PG-Long Term: 8.60 ha
- PG-10Y: 8.07 ha
- Dwelling-led 5Y: 20.20 ha
- Dwelling-led 10Y: 13.32 ha
- Employment-led OE: 1.03 ha.

7.55 However, this represents the employment land requirement specifically from these extra jobs and is not a forecast of OAN for the whole Vale economy. It is not possible to compare Methods Two A and Two B to gain a whole economy forecast given the differences in the approaches. Also, the fact that Method Two A, through the Oxford Forecasting, already makes an allowance for projected population change would lead to some duplication of needs.

7.56 In conclusion, it is considered that the most appropriate forecast is Practice Guidance Method One: Past Building Completions. Method One also has a number of advantages, in that it allows for:

- A more responsive approach to market demand based on what the market has successfully delivered to date
- For growth in the economy including the growth aspirations of both local businesses and for inward investment which may be unrelated to changes in jobs
- For flexibility in the supply to meet a diverse range of business needs which may be hard to anticipate in advance, particularly inward investment from outside of the Vale and the Cardiff Capital Region
- Companies unable to find the land and premises they need in Cardiff to be accommodated in the Vale, boosting the Vale's economy whilst keeping those firms within the economic market area of Cardiff City.

7.57 Within these two, Scenario One: Local/Strategic Take Up best reflects the full range of need the Vale is likely to have to 2036, with an ongoing strong demand for strategic B2/B8 and good growth prospects in all three strategic sites. The 67.80 ha of Scenario One: Local/Strategic Take Up could support 5,338 jobs, based on high level assumptions. 5,338 jobs capacity would be sufficient to meet the bulk of the additional jobs growth forecast in the nine population scenarios noted above, with only a modest proportion to be met through growth elsewhere in the economy in the two largest forecasts of growth. However, it should also be noted that the potential jobs growth against the total of strategic and local sites is 13,978 jobs, therefore the projected employment growth of 5,338 could be higher should the delivery of employment sites be greater than the baseline need.

8.0 CONCLUSIONS

Introduction

- 8.1 This study has included a wide-ranging look at the factors affecting the Vale of Glamorgan's economy, with particular reference to those that are likely to affect the future need for land and property within the Vale. 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 Welsh Government guidance, including Future Wales, Planning Policy Wales, TAN 6, TAN 23 and reflecting 'Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan' and 'Development Plans Manual (Edition 3)'. It updates the adopted LDP evidence base, on matters of B-Class land need and supply.

Economic Profile

- 8.3 The socio-economic profile of the Vale of Glamorgan shows that the population, as of 2020, stood at 135,295 residents, the sixth largest in the Cardiff Capital Region. 60.3 percent of the population was of working age, above the Welsh average (61.2 percent) but below the Cardiff Capital Region (62.0 percent) average.
- 8.4 The Welsh Indices of Multiple Deprivation were last updated in 2019, and of the 79 Lower Layer Super Output Areas (LSOAs) of the Vale of Glamorgan, three were ranked in the top ten percent most deprived in Wales. These LSOA's were located to the north of Merthyr Dyfan, north of Barry and to the south of Cowbridge in an area that incorporates Llanblethian and Llandough. Conversely, 49 (or 62.0 percent) of the LSOA's in the Vale of Glamorgan were in the top 50 percent least deprived LSOA's in Wales and over a quarter of the LSOAs (22) are found in the top ten percent least deprived in Wales. Thus, overall, the Vale has a low level of deprivation.
- 8.5 The largest sector in the Vale of Glamorgan's economy is the Health sector, with 8,000 jobs (19.5 percent of total employment), The Health sector accounted for a higher percentage than the average for Wales and the Cardiff Capital Region (both 15.0 percent), indicating the strength of the sector locally. It is noted that the majority

of the jobs within this sector are likely based within hospitals/other medical facilities and not in B-class premises.

- 8.6 Manufacturing was the next largest industry in the Vale of Glamorgan, employing 3,500 or 8.5 percent of the workforce. However, proportionately the role of Manufacturing seems weaker within the Vale of Glamorgan as proportions of 9.9 percent and 10.5 percent were observed across the Cardiff Capital Region and Wales respectively.
- 8.7 There were also a respectable 2,250 employed in Transportation and 2,500 employed in Construction locally, proportionately above wider averages, particularly for Transportation. They also gained 120 and 50 new businesses respectively, and 250 jobs each, over 2015-2020, evidence of healthy and growing local sectors.
- 8.8 Private office sectors accounted for a combined total of 15.4 percent, or 6,300 employees in the Vale, compared with 16.8 percent for Wales. Welsh averages will be skewed by Cardiff however, a long-established centre for the office economy.
- 8.9 From 2015-2020, the total number of jobs within the Vale of Glamorgan has stayed constant at 41,000. What growth which did occur, however, was focused in private office sectors. The Professional, scientific and technical sector saw the greatest increase in jobs over the period observed as 1,250 jobs were added, a 71.4 percent increase. The next largest increase in jobs was seen in the Business administration and support services sector where the workforce grew by 750 or 50.0 percent. This growth, combined with a small gain of 100 workers in the ICT sector, contributed to an overall strong growth in office-based sector employment of 48 percent.
- 8.10 The office-based sectors saw a combined net increase of businesses by 135, with the largest growth occurring in the ICT and Business administration sectors, increasing by 55 and 50 businesses respectively. This combined with a growth in jobs of 2,050 over the same period indicates that the office-based sectors have performed strongly in the Vale of Glamorgan at least pre the Covid-19 Pandemic.
- 8.11 Half of the 18 sectors saw a decline in employment between 2015-2020. The largest decrease was seen in the Manufacturing sector where 1,000 jobs were lost, 22.2 percent of the workforce. This is consistent with trends in forecasting which generally show losses in manufacturing employment both locally and nationally. The sector also lost 15 businesses over 2015-2020, further evidence of a sector in decline.

- 8.12 As of 2021 there were 4,365 VAT registered businesses operating in the Vale of Glamorgan. 91.1 percent of firms are micro in size, higher than the Cardiff Capital Region (88.8 percent) and the Welsh (89.6 percent) averages. Additionally, firms employing 250+ workers accounted for just 0.1 percent of businesses in the Vale of Glamorgan in 2021, compared to 0.4 percent in the Cardiff Capital Region and just 0.3 percent in Wales.
- 8.13 The 2021 data shows that 55.9 percent of the Vale of Glamorgan's resident population was also employed in the area. This is a low rate of retention, but not exceptionally so given the Vale's position on the western edge of Cardiff. Indeed, it is broadly similar to rates in other local authority areas which neighbour the City, such as Caerphilly, Blaenau Gwent and Torfaen. Cardiff and Bridgend were the main commuter destinations from the Vale although both in an out commuting were substantially reduced, in 2021 data at least, on pre Covid-19 levels.
- 8.14 Median earnings of the residents in the Vale of Glamorgan, when measured by place of work, was the second lowest in the Cardiff Capital Region (£499.40), behind Bridgend (£464.10). When measuring the gross median weekly pay by place of residence, the Vale of Glamorgan's median of £593.30 was the second highest, behind Monmouthshire (£688.80). This indicates that there is a large disparity between the wages workers can earn in the Vale of Glamorgan to what can be earned elsewhere.

Property Market Assessment

- 8.15 The national economy has been through a series of tumultuous changes in recent years. First there were signs of recovery from the global financial crisis of 2008 before commercial confidence was unsettled again following the decision to leave the EU in 2016. Although a trade deal was finalised between the EU and UK by December 2020, the global economy was again in crises due to the impact of the Covid-19 Pandemic.
- 8.16 Whilst there were still challenging times for certain sectors of the economy such as hospitality and retail, the wider economy appeared to bounce back relatively quickly from the Covid Lockdowns.
- 8.17 More recently, however, we have faced a global energy crisis exacerbated by the war in Ukraine since February 2022 and other inflationary pressures. The Consumer

Price Index of inflation rose 9 percent in the twelve months to April 2022, up from 7 percent in March and the Bank of England expect it to reach 10 percent later this year before contracting in 2023 and potentially returning to a more normal 2 percent level in by 2024/2025.

- 8.18 These pressures are expected to lead to a modest contraction in UK economic activity in 2022/2023 but this will be followed by recovery in 2024. Evidence also suggests the 2022/23 downturn will not generate mass unemployment, indeed record employment in 2022 is leading to staff shortages in areas such as manufacturing and logistics.

Industrial Market

- 8.19 Industrial and logistics property take up was over 50 percent higher in 2021 than the typical five-year average, topping out at 78 million sqft (7.2 million sqm) across the UK. Take up of large scale B2/B8 units in Wales has been held up by a lack of supply compared to most English regions and there is still a relative lack of investment in speculative advanced property development. However, Wales still saw 3.1 million sqft (288,000 sqm) of industrial and logistics take up in 2021.
- 8.20 Over the last ten years 145 industrial deals have been recorded in the Vale of Glamorgan, within which a total of 83,950 sqm of floorspace has been transacted. Properties of 501-1,000 sqm were most frequently transacted, accounting for 29.0 percent of the total during the timeframe.
- 8.21 In 2021, despite the ongoing Covid-19 Pandemic the amount of industrial/warehouse floorspace transacted surged to levels not seen since 2016/2017. 2021 saw good market activity both for smaller 101-200 sqm units and mid-sized floorspace of 1,001-5,000 sqm, with deals focused in Llandough Trading Estate and at Atlantic Trading Estate, Barry.
- 8.22 All of the industrial transactions recorded over the last decade were leasehold, indicating a limited freehold market locally. The average rent achieved over the decade was £6.18/sqft (£66/sqm). The highest rent achieved was £28.32/sqft (£63/sqm) which came in 2020 when a 502 sqm industrial unit was rented on Llandough Trading Estate to Cardiff Pottery Workshop.
- 8.23 As of April 2022, within Vale of Glamorgan a total of 12,766 sqm of industrial floorspace was being marketed comprised of 16 individual premises. From property

transactions, an average take-up per year has been recorded over the last decade of 8,395 sqm/year, meaning there is 1.5 year's supply of vacant industrial floorspace in the Vale of Glamorgan.

- 8.24 Most vacant property was 201-1,000 sqm in size. This is not in line with the transactions detailed above as the most transacted industrial units were 1,001-5,000 sqm in size. Interestingly, despite the fact that industrial units 0-100 sqm in size accounted for 27.6 percent of all transactions over the past decade, there was not a single unit available on the market at the observed moment in time, suggesting an area of shortage in supply against demand.

Office Market

- 8.25 In terms of the UK Office Market, this clearly stalled during the early stages of the Covid Pandemic with the switch to homeworking. Large corporations have, as a result, reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market. Whilst the core cities across the UK have seen some improvement in demand, generally office take-up is still some 10 percent below the previous 10-year average.
- 8.26 Cardiff, of course, dominates the Wales office market but take-up was under 30,000 sqm in 2021, 20 percent down against an already below average level from 2020. However, investors continue to show faith that evolving demands for office space do not translate into no demand for office space and new development in progressing in the city.
- 8.27 Given competition from Cardiff for larger requirements, it is perhaps unsurprising that in the Vale of Glamorgan office units of a small size are most popular, with units under 100 sqm accounting for nearly two thirds of all transactions. Since 2018 only 15 office transactions have occurred in the Vale of Glamorgan. Local office market performance was not noticeably worse in 2020 and 2021, than was the case in 2019. Thus, the Covid-19 Pandemic, and associated Lockdowns did not significantly impact on the local office market rather, with only a couple of exceptional years, it has always been modest in the Vale.
- 8.28 Of the 73 office deals to complete in the last ten years, 64 (87.7 percent) were leasehold transactions. Additionally, offices to let dominated the market in the Vale of Glamorgan with 13 of the 14 offices being available on this basis. This would suggest

that there is a shortage of freehold office options in The Vale of Glamorgan. There were more units of 101-200 sqm available than any other size band (42.8 percent). No units were being marketed larger than 1,000 sqm as of July 2022.

Property Market Stakeholders

8.29 Stakeholders identify three distinct spatial markets:

Barry

8.30 Barry is home to a strong local industrial economy which generates demand for B2 industrial units of 150-2,000 sqm, and small flexible workshops of up to 150 sqm. Barry's distance from the M4 inhibits its ability to compete for larger inward investment requirements, however, it is well placed to pick up some of the unmet requirements from Cardiff, which has a shortage of standard industrial land and premises. The office market in Barry, however, is more poorly developed, being largely in the shadow of nearby Cardiff.

Cardiff Airport and Bro Tathan Enterprise Zone

8.31 The two parts of the Enterprise Zone form a strategic offer, attractive to specialist aerospace investment capitalising on direct access to private airstrips and, moving forward, the plans of the Cardiff and Vale College. Development at Bro Tathan has delivered a high-quality, mixed business park, something the Vale has lacked and a highly competitive asset within the Welsh economy.

Rural Vale

8.32 There is a positive perception of market demand across the wider rural Vale area, although very different to that of Barry. Demand in the rural Vale is very localised either servicing the market towns of Llantwit Major and Cowbridge or small local businesses operating as part of the wider regional supply chain. Demand is mostly industrial, but Cowbridge is emerging as a popular location for small office suites for local businesses.

8.33 Vale Business Park meets a lot of needs, but existing farm diversification schemes have performed well and opportunities for similar farm diversification could be encouraged (subject to transport impacts on local areas). Alongside this is the agri-food opportunity discussed separately below.

Cardiff Capital Region Market Area

8.34 This Study has identified the following cross boundary issues which impact on the Vale:

- **Automotive/High Tech Bridgend** – Bridgend has a sizable economic catchment which extends into the western Vale. The closure of the Ford Engine plant, combined with the more recent closure of Honda at Swindon, will have significant impacts on the Tier 2-4 automotive parts suppliers of the Capital Region, many of whom focused on supplying those two facilities. Further growth in the automotive sector in the sub-region likely now depends on what new investment for Electric Vehicles can be brought in. Despite this loss, Bridgend is home to a range of other large employers and has scope for further growth, both from the redevelopment of the Ford plant and the 46.1 ha Brocastle, Waterton site. Also, of larger than local significance is Pencoed Technology Park at Junction 35 of the M4. Home to a range of high technology businesses it is expected to remain a significant draw for such uses, located on the edge of Vale of Glamorgan and a barrier to developing an equivalent high technology park in the Vale
- **Industrial Cardiff** – City Council officers report some shortfall in industrial land, against take up rates, and economic development officers for the City report that they do pass large industrial enquiries on to the Barry area where a range of at least small industrial sites and premises are more likely to be available
- **Office Cardiff** – Cardiff is a focus for the Welsh office economy, with 985,000 sqm of office floorspace as of 2020, 29.7 percent of all office accommodation in Wales and more than half of the 1.908 million sqm of floorspace in the Capital Region. Supply is focused in the City Centre and Cardiff Bay Area, with a focus on telecommunications and the media. Evidence is that Cardiff's office market is recovering well from the Covid-19 Pandemic, particularly for the best quality options, potentially reducing opportunities for office investment elsewhere in the Capital Region
- **Logistics Monmouthshire/Newport** – Monmouthshire has a key role in the logistics market for the Cardiff Capital Region given its position on most of the strategic routes to and from England. It also sits east of the Brynglas Tunnels on the M4 which are identified as a key barrier for logistics operators. Key in this regard is Newhouse Farm Distribution Park, Chepstow, a major logistics facility off Junction 2, M48. Any development of further B8 accommodation in

this key gateway area, or in the east of Newport, would affect logistics demand further west along the M4 Corridor

- **High Tech/Services Newport** – Imperial Park and the adjacent Celtic Springs form a significant business cluster in the west of Newport, home to major employers in semi-conductors, pharmacy, aerospace and the public sector. It forms a significant cluster of high value uses is likely to generate significant competition for equivalent facilities in the Cardiff Capital Region, which might include the Cardiff Airport-Bro Tathan Enterprise Zone and plans at Renishaw
- **Chemicals Newport** – There is identified growth potential linked to the Eastman Chemicals facility in the east of Newport. This will overlap with the Barry Chemicals Complex
- **Life Sciences Torfaen/Cardiff** – Key will be site SAA7: Llanfrechfa Grange Strategic Action Area, which is adjacent to Llanfrechfa Grange Hospital, Cwmbran. Current Plans would see a Medi Park of some 5.2 ha delivered here. This development, along with another Life Sciences park, of some 22,500 sqm, planned at Coryton, on the north-west outskirts of Cardiff are likely to meet most needs from life sciences businesses in the Cardiff Capital Region.

Existing Employment Areas

- 8.35 The Vale's existing 22 Employment Areas have been appraised and graded following the methodology set out in 'Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales' (Report of the Pathfinder Group, 2017). The results of that Grading can be found in Table 35.
- 8.36 It is assumed that future growth will be focused around the 12 Employment Areas identified as being 'Major' or 'Secondary' Employment Sites. The Secondary and Key Local Employment Sites represent the County Borough's supply of B1/B2/B8 premises for meeting local needs. They should be protected for that use.
- 8.37 Overall, there is some 913.89 ha of developed land in, or with potential for, B1/B2/B8 uses in the Vale of Glamorgan. 59.4 percent of this, 542.63 ha, is contained within the Cardiff Airport-Bro Tathan Enterprise Zone, including the 210.88 ha Cardiff Airport. Barry Docks and the Chemicals Complex comprise another 21.4 percent or

195.37 ha. The largest purely industrial estate in the Vale is MD16.18: Vale Business Park at 28.29 ha or 3.10 percent of the total.

Table 35 – Employment Area Hierarchy

Type	Typical Characteristics	Typical Importance	Employment Areas
Major Employment Site	Typified by large areas of land capable of accommodating a variety of uses. Sites are predominantly key development areas of a sufficient scale and location attracting individuals and investment from a wide catchment area, whilst affording access to regional/sub-regional markets. Sites are typically occupied by large renowned companies who are features of the national/international markets.	Sites of larger than local Authority-wide importance	MD16.1 – Barry Docks MD16.2 – The Chemical Complex MD16.12- Cardiff Airport Business Park MD16.13 – MOD St Athan MD16.14 – Aberthaw Power Station MD16.15 – Aberthaw Cement Works MD16.21 - Renishaw
Secondary Employment Sites	Sites typically have a variety of employment uses and tend to draw individuals and investment from within the local authority area. There may be a small presence of national companies within these estates however established larger local businesses tend to predominate.	Sites of Local Authority-wide Importance	MD16.3 – Atlantic Trading Estate MD16.6 – Ty Verlon Industrial Estate MD16.10 – Llandough Trading Estate MD16.11 – West Point Industrial Estate MD16.18 – Vale Business Park, Llandow
Key Local Employment Sites	Sites of significance in the local context, offering important local employment opportunities. Sites are typified by a local SME/start-up presence and will usually have the space to allow such businesses to grow and expand in the short-medium term.	Sub-local Authority Employment Sites	MD16.4 – Palmerston Trading Estate MD16.5 – Sully Moors Road Industrial Estate MD16.7 – Cardiff Road Business Park MD16.9 – St Hilary Court MD16.16 – Heritage Business Park MD16.17 – Llandow Trading Estate MD16.19 – Dyffryn Business Park MD16.20 – West Winds Industrial Estate MD16.22 – Llandow South
Neighbourhood Employment Sites	Such sites provide employment opportunities for members of the surrounding communities. These sites are typically small in scale and contain a small number of businesses. Such businesses tend to serve the immediate area and do not have a wide catchment. This definition extends to include small rural employment sites.		MD16.8 – Vale Enterprise Centre

Source: BE Group, 2022

- 8.38 One third of the 22 Areas are fully occupied, with the average occupancy rate standing at 84.3 percent. Excluding the decommissioned Aberthaw Power Station, the next lowest occupancy rate is seen at Llandow Trading Estate which has only 52 percent of its units occupied. However, this Estate mostly comprises open storage plots whose occupancy it is harder to assess.
- 8.39 Occupancy rates of 90-100 percent can be considered high, giving little choice to businesses while rates of 70 percent or less suggest excess capacity in the stock, possibly coupled with issues of quality in the supply. Most of the Employment Areas thus have a high occupancy rate allowing for the natural churn over of businesses expanding/contacting and relocating within the Vale.
- 8.40 Vacant parcels of land were reviewed in each existing Employment Area, excluding land already allocated for employment development in the LDP, and discussed in Table 19, Section 6.0. As was the case in the 2013 Study, most available employment land, outside of existing LDP Allocations, comprises low grade plots at MD16.1: Barry Docks and MD16.2: The Chemicals Complex.
- 8.41 CCR have purchased MD16.14: Aberthaw Power Station and have long term aspirations to redevelop it. Over the long term MD16.17: Llandow Trading Estate may also become available for redevelopment, for uses judged appropriate by planning policy, although most land is in use for open storage at present and attracting a development partner to this relatively isolated rural location would likely be challenging.

Employment Land Supply

- 8.42 In terms of land supply, an analysis of the 11 sites allocated for future employment development under Policy MG9 of the adopted Vale of Glamorgan Local Development Plan 2011 – 2026 (2017), plus two other relevant planning consents, was undertaken in Section 7.0. This analysis concluded that 177.54 ha net (205.91 ha gross) of employment land was realistically available in the Borough as of summer 2022. This included 139.14 ha net (167.51 ha gross) of strategic employment land and 38.40 ha (net and gross) of local employment land and reflected:
- Good prospects of delivery on the Land to the South of Junction 34 M4 Hensol
 - That some 61.05 ha is proposed to be brought forward on the Land adjacent to Cardiff Airport and Port Road, Rhoose (part of Cardiff Airport-Bro Tathan

Enterprise Zone) and another 48.5 ha is likely to be delivered at Aerospace Business Park, St Athan Rhoose (part of Cardiff Airport-Bro Tathan Enterprise Zone over the RLDP period

- That after a range of recent, mostly industrial developments in Barry, 19.36 ha remains available in the town, on sites presently allocated for B-Class uses in the existing LDP or linked to planning consents
- The unlikelihood of development on the Llandow Trading Estate without a major external investment.

Evidence of Deliverability of Employment Land

8.43 All of the eight allocated or otherwise available sites in the realistic supply show evidence of deliverability, specifically having seen recent B-Class development onsite (Aerospace Business Park, St Athan Rhoose (part of Cardiff Airport-Bro Tathan Enterprise Zone; Atlantic Trading Estate and Windmill Park, Hayes Road, Barry) or on an immediately adjacent plot (Hayes Wood, Barry and Vale Business Park). Alternatively, where landowners with the financial means to deliver B-Class schemes are actively progressing proposals (Land to the South of Junction 34 M4 Hensol and Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)). **Given this good evidence of deliverability it is assumed that all of this available supply will be developed over the RLDP period to 2036.**

8.44 Some questions remain over Land at Ffordd y Mileniwm. The site has been on the market for a decade and has only attracted interest for retail and leisure. This may partially reflect the site's peripheral position in the core Barry Docks/Atlantic Trading Estate market area, but also likely the lack of site servicing and access, the costs of which will impact on viability. Enquiries have been made regarding an alternative commercial use which would at least provide a road access point to open up the wider site for development. However, given apparent inability of private partners to bring forward land for B-Class development, after over a decade of marketing, it is likely that even with this infrastructure in place an element of external support will still be required to attract occupiers and bring forward the site for development. If a 'way forward' for delivery cannot be agreed the site should not be allocated again, for B-Class uses in the RLDP. In that case realistic land supply figures would reduce by 7.65 ha on those shown above.

The Geographic Split of Strategic Employment Land

- 8.45 As is noted below, the 139.14 ha net (167.51 ha gross) of available strategic employment land does exceed projected needs overall. However, this supply is likely to net down further once areas of undevelopable land or land to be used for infrastructure, etc., are allowed for. Additionally, looking beyond the baseline requirement it is important to highlight that the three big strategic sites will meet differing market needs, at differing times during the RLDP period, delivering economic gains beyond simply meeting the Vale's baseline employment land requirements.
- 8.46 The Land to the South of Junction 34 M4 Hensol provides the opportunity for a strategic scale industrial scheme on the M4 Corridor, something the Vale is noticeably lacking. Development here will likely include some B8 warehousing although a purely logistics scheme is unlikely given the stated plans of Renishaw and competition from established B8 facilities further east on the M4.
- 8.47 If future development at the Aerospace Business Park, St Athan, Rhoose follows past trends, the remaining 48.5 ha of net employment land at the Eastern Zone will be taken up relatively early in the RLDP period for a number of specialist uses. The Land adjacent to Cardiff Airport and Port Road, Rhoose offers a more general opportunity to attract high value businesses, from a range of sectors, building on advantages including the proposed new College facilities and the presence of the Airport. The Land adjacent to Cardiff Airport and south of Port Road is also proposed to come forward over a longer timeframe than the other two strategic sites, providing strategic development land, to market to inward investors, up to 2036. The wider Enterprise Zone will also benefit from the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment, particularly at airport and dock facilities.

Further Employment Development Opportunities

- 8.48 This Study has identified several opportunities for further employment development in the Vale over the period to 2036 which will need to be considered in the LDP:
- *Aberthaw Power Station Redevelopment* – Now owned by CCR, reclaiming the site will take 6-7 years meaning that redevelopment is unlikely before 2029-2030. The gross site area is 45.87 ha although a masterplan will be prepared later in 2022 which will identify the net developable area

- *Barry Docks* – Docks owner ABP is now taking a more active approach to opening up the Docks to investment. It has moved low value tenants out and demolished poor-quality space to create a 21 ha platform for new development, referred to as Atlantic Crescent, Unit 19 and Coal Yard. ABP's agents report that the company would be open to moving the Docks security fence, as has been done in Cardiff, to create areas of open and unsecured land for general development, including for non Port-related employment. Agents for the Docks report good demand for standard (i.e., non-port use) industrial and warehouse properties of up to 2,000 sqm here. At the time of writing 23.83 ha of land, in four parcels was on the market, to let within the Docks (See Appendix 4). In the western Docks, 2,900 sqm of Business Incubation space is proposed on 'the Mole' under the Barry Making Waves Project.
- *The Chemicals Complex, Barry* – Large areas of vacant land along Hayes Road and Sully Moors Road regularly come on the market as development opportunities sites. At the time of writing the 19.43 ha Greenhill Investments owned Hayes Road site is on the market, for sale or to let, in three plots. It should also be noted that much of the east of the Complex is subject to a 99 year lease to developer St Modwen which is likely to be interested in schemes for investment and development here.

8.49 A related project is the requirement for a new Livestock Auction Centre in the Vale, which could be co-located with a range of other businesses on a 1.6 ha site. A second scheme is for a food production park accommodating up to 13 units of 150-800 sqm each, together with a development kitchen and business innovation suite, on another 1.6 ha. Demand and public sector support exists for both. Assuming appropriate land can be found, the opportunity exists to accommodate both in the Vale. At the time of writing, the main barriers to delivery here are a £1 million capital shortfall to develop the Livestock Auction Centre/related business space and the ability to provide a site for the Food Park at effectively nil cost.

Future Land Requirements

8.50 The Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan' 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 and population change. Neither approach provides a

definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and they are considered in the context of the market overview undertaken as part of this study.

- 8.51 A further model, Resident Workforce (Demand from New Labour, Method Two B) has been produced which indicates the maximum additional employment land need from nine Scenarios of working age population growth provided by the Council.

Practice Guidance Method One: Past Building Completions

- 8.52 Take up data is available for the period 1996-2021 (i.e., 25 years), from a variety of sources. Most data came from the Council, apart from the years 2007 and 2011, where take-up figures came from the annual returns supplied by the Council to the now disbanded South East Wales Economic Forum. The data is split between local completions and strategic development at Renishaw and Bro Tathan. Using this data, taking averages of the annual take up recorded within them and applying them to the RLDP period 2021-2036 (15 years) allows two forecast scenarios of Past Completions to be made (see Table 36).

Table 36 – Past Building Completions Forecast

Forecast Scenarios	Annual Average Employment Completions, ha	2021-2036 Land Requirement, ha
Scenario One: Local/Strategic Take Up	3.39	50.85
Scenario Two: Local only Take Up	1.88	28.20

Source: Vale of Glamorgan Council and BE Group, 2022

- 8.53 Broadly, Scenario One provides the most rounded picture of development needs in the Vale, reflecting the dominance of strategic sites in the Vale’s economy and the fact that most development, since 2013 at least, has occurred in at the Enterprise Zone, with further growth expected to be focused here and at Land to the South of Junction 34 M4 Hensol.
- 8.54 The Vale should also have a minimum buffer of five years supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period. Based on the historic take-up trend this would generate a further land need of 9.40-16.95 ha, i.e.
- Scenario One: Scenario One: Local/Strategic Take Up: 3.39 ha x 5 years = 16.95 ha

- Scenario Two: Local only Take Up: 1.88 ha x 5 years = 9.40 ha

8.55 Added to the 2021-2036 need figure, this increases the requirements to:

- Scenario One: Scenario One: Local/Strategic Take Up: 50.85 ha + 16.95 ha = **67.80 ha**
- Scenario Two: Local only Take Up: 28.20 + 9.40 ha = **37.60 ha**

Practice Guidance Method Two A: Labour Demand Forecasting

8.56 The Net Change employment-based forecast (Method Two A), suggests the following in terms of future employment land provision to 2036:

- B1 Offices – 592 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 2.37 ha
- B2/B8 Industrial – 1,060 less jobs at 67 sqm per worker and a 40 percent plot ratio = -17.76 ha
- Total net need = **-15.39 ha**

8.57 This assumes mid-range employment density levels, reflecting Welsh Planning Practice Guidance and again a 40 percent plot ratio.

Practice Guidance Method Two B: Resident Workforce Forecast

8.58 The ten Scenarios of population/jobs change, produce the following land needs under Demand from New Labour (Method Two B):

WG-2014

8.59 1,890 less jobs would generate a need of:

- B1 Offices – 1,009 less workers at 16 sqm per worker and a 40 percent plot ratio = -1.90 ha
- B2/B8 Industrial – 361 less workers at 67 sqm per worker and a 40 percent plot ratio = -3.26 ha
- Total net need = **-5.16 ha.**

WG-2018

8.60 3,645 additional jobs would generate a need of:

- B1 Offices – 917 additional workers at 16 sqm per worker and a 40 percent plot ratio = 3.67 ha
- B2/B8 Industrial – 375 additional workers at 67 sqm per worker and a 40 percent plot ratio = 6.29 ha

- Total net need = **9.96 ha.**

WG-2018-HIGHPOP

8.61 4,380 additional jobs would generate a need of:

- B1 Offices – 1,237 additional workers at 16 sqm per worker and a 40 percent plot ratio = 4.41 ha
- B2/B8 Industrial – 385 additional workers at 67 sqm per worker and a 40 percent plot ratio = 7.56 ha
- Total net need = **11.97 ha.**

WG-2018-LOWPOP

8.62 2,865 additional jobs would generate a need of:

- B1 Offices – 721 additional workers at 16 sqm per worker and a 40 percent plot ratio = 2.88 ha
- B2/B8 Industrial – 295 additional workers at 67 sqm per worker and a 40 percent plot ratio = 4.94 ha
- Total net need = **7.82 ha.**

PG-5Y

8.63 6,390 additional jobs would generate a need of:

- B1 Offices – 1,608 additional workers at 16 sqm per worker and a 40 percent plot ratio = 6.43 ha
- B2/B8 Industrial – 658 additional workers at 67 sqm per worker and a 40 percent plot ratio = 11.02 ha
- Total net need = **17.45 ha.**

PG-Long Term

8.64 3,150 additional jobs would generate a need of:

- B1 Offices – 793 additional workers at 16 sqm per worker and a 40 percent plot ratio = 3.17 ha
- B2/B8 Industrial – 324 additional workers at 67 sqm per worker and a 40 percent plot ratio = 5.43 ha
- Total net need = **8.60 ha.**

PG-10Y

8.65 2,955 additional jobs would generate a need of:

- B1 Offices – 834 additional workers at 16 sqm per worker and a 40 percent plot ratio = 2.97 ha
- B2/B8 Industrial – 260 additional workers at 67 sqm per worker and a 40 percent plot ratio = 5.10 ha
- Total net need = **8.07 ha**.

Dwelling-led 5Y

8.66 7,395 additional jobs would generate a need of:

- B1 Offices – 1,861 additional workers at 16 sqm per worker and a 40 percent plot ratio = 7.44 ha
- B2/B8 Industrial – 762 additional workers at 67 sqm per worker and a 40 percent plot ratio = 12.76 ha
- Total net need = **20.20 ha**.

Dwelling-led 10Y

8.67 4,875 additional jobs would generate a need of:

- B1 Offices – 1,377 additional workers at 16 sqm per worker and a 40 percent plot ratio = 4.91 ha
- B2/B8 Industrial – 429 additional workers at 67 sqm per worker and a 40 percent plot ratio = 8.41 ha
- Total net need = **13.32 ha**.

Employment-led OE

8.68 375 additional jobs would generate a need of:

- B1 Offices – 94 additional workers at 16 sqm per worker and a 40 percent plot ratio = 0.38 ha
- B2/B8 Industrial – 39 additional workers at 67 sqm per worker and a 40 percent plot ratio = 0.65 ha
- Total net need = **1.03 ha**.

8.69 It is important to note that this represents the employment land requirement specifically from these population and jobs growth scenarios and is not a forecast of OAN for the whole Vale of Glamorgan economy. However, it does illustrate the maximum economic impacts of the projected jobs growth rates of -1,890 to +7,395, to 2036.

Comparing Employment Methods

- 8.70 However, these employment methods of forecasting make no allowance for real world market and occupier conditions. E.g., that land take-up/property needs can be for different reasons which have nothing to do with jobs growth 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. Experience also suggests that even where businesses are contracting in terms of the numbers they employ, they will continue to hold onto land 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.
- 8.71 It is therefore considered that the employment-based land requirements' calculations can represent a false position. 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 the period 1996-2021 and compared to the actual land take-up during that period (see Table 37).

Table 37 – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 2,587 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
16 sqm per worker	41,390	10.35
Industrial (B2/B8)	Based on 1,678 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
67 sqm per worker	-112,426	-28.11
Net Needs	-71,036	-17.76
<i>Take Up 1996-2021</i>	-	<i>84.66 (47.06 local only)</i>

Source: BE Group, 2022

- 8.72 The trend shows that net jobs growth is not an accurate method of calculating land. Forecasting suggests that over 1996-2021 the Vale of Glamorgan should have gained 10.35 ha of B1 office land but lost 28.11 ha of B2/B8 land, a substantial net loss of B-Class land. In reality, 47-85 ha of completions were recorded, the vast majority being for industrial and warehousing premises. **This calculation reinforces the view that historic take-up is the most appropriate method.**
- 8.73 A summary of the various forecast scenarios is set out in Table 38. They relate to the period 2021-2036. The variation in the outcome figures demonstrates the uncertainty of forecasting. While all models show that the Vale has a surplus of land, against

quantitative needs, that oversupply ranges from 0.80 ha to 109.74 ha. However, from the market assessment and reviewing the historic trends in employment change and land take up, the conclusion is that Practice Guidance Method Two: Labour Demand Forecasting underestimates land needs significantly.

8.74 In conclusion, it is considered that the most appropriate forecast is Practice Guidance Method One: Past Building Completions. Some advantages of Method One are that it allows for:

- A more responsive approach to market demand based on what the market has successfully delivered to date
- For growth in the economy including the growth aspirations of both local businesses and for inward investment which may be unrelated to changes in jobs
- For flexibility in the supply to meet a diverse range of business needs which may be hard to anticipate in advance, particularly inward investment from outside of the Vale and the Cardiff Capital Region
- Companies unable to find the land and premises they need in Cardiff to be accommodated in the Vale, boosting the Vale's economy whilst keeping those firms within the economic market area of Cardiff City.

8.75 The need to plan for strategic as well as local growth in the Vale favours the Scenario One: Local/Strategic Take Up over the Local only forecast. This indicates that the Vale of Glamorgan has a surplus employment land supply of **109.74 ha** against needs. However, comparison with Scenario Two: Local only Take Up suggests that the surplus is mostly found in the strategic supply and the Vale has only just enough local land to meet projected needs on a Take-Up based model.

Table 38 – Land Forecast Models – Summary

Model	Scenario	A: Land Need 2021-2036, ha	B: Flexibility Buffer (five years take-up rate) ha	C: Land Need Incl. flexibility buffer	D: Land Stock 2022, ha (net)	E: Surplus (or Shortfall), ha	Assumptions
Comments on the Table	<i>The models and scenarios for projecting land needs in the Vale, over 2021, as set out in Section 7.0</i>	<i>Baseline Land Need over 2021-2036 (15 years), in hectares derived from the models, as set out in Section 7.0</i>	<i>A Buffer of an additional five years take up to provide businesses with a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period.</i>	<i>A+B=C, the total land need to 2036 comprising the baseline need and five year buffer</i>	<i>The stock of land, both local and strategic employment land available to meet the identified needs, as defined in Paras 6.9-6.11 and Table 17, Pages 95-107, Section 6.0</i>	<i>D-C=E, the surplus or shortfall in employment land which remains once the total need (C) is deducted from the available supply (D)</i>	
Practice Guidance Method One: Past Building Completions	Scenario One: Local/Strategic Take Up	50.85	16.95	67.80	177.54 – Local/Strategic	109.74	Based on historic (25 years) take-up on the local and strategic employment sites and areas of the Vale, equating to 3.39 ha/year
	Scenario Two: Local only Take Up	28.20	9.40	37.60	38.40 – Local Only	0.80	Based on historic (25 years) take-up on only the local employment sites and areas of the Vale, equating to 1.88 ha/year
Practice Guidance Method Two: Labour Demand Forecasting	-	<i>Net Change</i> B1: 2.37 B2/B8: -17.76 Total: -15.39 <i>Growth Only</i> B1: 2.79 B2/B8: 0.62 Total: 3.41	<i>Net Change</i> B1: 0.79 B2/B8: N/A Total: 0.79 <i>Growth Only</i> B1: 0.93 B2/B8: 0.20 Total: 1.13	<i>Net Change</i> B1: 3.16 B2/B8: -17.76 Total: -14.60 <i>Growth Only</i> B1: 3.72 B2/B8: 0.82 Total: 4.54	38.40 – Local Only	<i>Net Change</i> 53.00 <i>Growth Only</i> 33.86	Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors

Source: Vale of Glamorgan CBC/BE Group, 2022

Jobs Capacity

- 8.76 Converting the realistic employment land supply into jobs indicates that the 177.54 ha could support up to 13,978 jobs. Some 21.6 percent of these jobs would be from the local supply, 3,019, and the remainder, 10,959, from the strategic supply. **It is important to emphasise that this is a measure of the jobs capacity this land could support rather than a forecast of new jobs which could be generated in the Vale.**
- 8.77 The 67.80 ha gross need of Scenario One: Local/Strategic Take Up could support 5,338 jobs to 2036, based on high level assumptions derived from Welsh Government guidance. Again, this is a measure of the jobs capacity of the land rather than a projection of jobs growth. 5,338 jobs capacity would be sufficient to meet the bulk of the additional jobs' growth forecast in the nine population scenarios noted in Section 7.0. Only for the two largest forecasts of population and jobs increase – PG-5Y: 6,390 jobs, Dwelling-led 5Y: 7,395 jobs – would some of the extra jobs have to be drawn from growth in the wider economy.
- 8.78 While 5,338 jobs is only 38.1 percent of the total capacity of 13,978 jobs of the full 177.54 ha of realistic supply it is important to note that the bulk of that realistic supply (78.4 percent) comprises strategic sites which may not be completed in the Replacement LDP Period. I.e., a high proportion of that jobs capacity of 13,978 will not be realised till after 2036. Additionally, 13,978 jobs give extra capacity for improvements in local employment, for example through reducing out commuting from the Vale, to generate, or retain, more jobs than might be forecast.

9.0 RECOMMENDATIONS

Introduction

- 9.1 This section sets out the recommendations arising from the Employment Land Study. The recommendations in this report have had full regard to the requirements of Welsh planning policy to encourage and deliver growth through the planning system.

Employment Land Need

Recommendation 1 – Future Employment Land Need

- 9.2 The remaining supply of LDP allocated land, 177.54 ha net (205.91 ha gross), comprising 139.14 ha net (167.51 ha gross) of strategic employment land and 38.40 ha (net and gross) of local employment land, will meet overall needs to 2036 under all the scenarios put forward in this study. This includes Practice Guidance Method One: Past Building Completions which uses take up rates of 3.39 ha/year, and identifies quantitative needs of 109.74 ha over 2021-2036, inclusive of a five-year flexibility buffer.
- 9.3 Practice Guidance Method Two: Labour Demand Forecasting, suggests land needs of -53.00 ha to 2036 using the 'Net Change' scenario and -33.86 ha using the 'Growth Only' scenario. However, BE Group does not recommend use of the economic forecasts as the basis for defining employment land need. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Other issues include:
- That within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
 - That reductions in job levels will not necessarily lead to equivalent reductions in floorspace need. For example, a manufacturing business may replace labour with automated processes which are more efficient, but which take up an equivalent amount of floorspace in the factory. Surplus space may also be held for B8 storage and the more complex supply chain logistics of modern industry is increasing rather than decreasing floorspace needs
 - 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 2036
- The level and nature of the existing employment land supply.

9.4 By comparison, Practice Guidance Method One: Past Building Completions has a number of advantages, in that it allows for:

- A more responsive approach to market demand based on what the market has successfully delivered to date
- For growth in the economy including the growth aspirations of both local businesses and for inward investment which may be unrelated to changes in jobs
- For flexibility in the supply to meet a diverse range of business needs which may be hard to anticipate in advance, particularly inward investment from outside of the Vale and the Cardiff Capital Region
- Companies unable to find the land and premises they need in Cardiff to be accommodated in the Vale, boosting the Vale's economy whilst keeping those firms within the economic market area of Cardiff City.

9.5 **It is therefore recommended that Vale of Glamorgan Council use the roll forward of historic take-up as the main measure of the Vale's future land needs for the period up to 2036 (see Table 39). Scenario One: Local/Strategic Take Up best accounts for the full range of need the Vale will face over the next 15 years. This indicates a need of 67.80 ha to 2036, incorporating a five-year buffer. Measured against the Vale's current realistic supply there is sufficient land to meet needs.**

9.6 The 67.80 ha gross need of Scenario One: Local/Strategic Take Up could support 5,338 jobs, based on high level assumptions. 5,338 jobs capacity would be sufficient to meet the bulk of the additional jobs' growth forecast in the from nine population scenarios noted in Section 7.0. **However, it should also be noted that the potential jobs growth against the total of strategic and local sites is 13,978 jobs, therefore the projected employment growth of 5,338 could be higher should the delivery of employment sites be greater than the baseline need.**

Table 39 – Land Forecast Models – Summary

Model	Scenario	A: Land Need 2021-2036, ha	B: Flexibility Buffer (five years take-up rate) ha	C: Land Need Incl. flexibility buffer	D: Land Stock 2022, ha (net)	E: Surplus (or Shortfall), ha	Assumptions
Comments on the Table	The models and scenarios for projecting land needs in the Vale, over 2021, as set out in Section 7.0	Baseline Land Need over 2021-2036 (15 years), in hectares derived from the models, as set out in Section 7.0	A Buffer of an additional five years take up to provide businesses with a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2036 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period.	A+B=C, the total land need to 2036 comprising the baseline need and five year buffer	The stock of land, both local and strategic employment land available to meet the identified needs, as defined in Paras 6.9-6.11 and Table 17, Pages 95-107, Section 6.0	D-C=E, the surplus or shortfall in employment land which remains once the total need (C) is deducted from the available supply (D)	-
Practice Guidance Method One: Past Building Completions	Scenario One: Local/Strategic Take Up	50.85	16.95	67.80	177.54 – Local/Strategic	109.74	Based on historic (25 years) take-up on the local and strategic employment sites and areas of the Vale, equating to 3.39 ha/year
	Scenario Two: Local only Take Up	28.20	9.40	37.60	38.40 – Local Only	0.80	Based on historic (25 years) take-up on only the local employment sites and areas of the Vale, equating to 1.88 ha/year
Practice Guidance Method Two: Labour Demand Forecasting	-	<p><i>Net Change</i> B1: 2.37 B2/B8: -17.76 Total: -15.39</p> <p><i>Growth Only</i> B1: 2.79 B2/B8: 0.62 Total: 3.41</p>	<p><i>Net Change</i> B1: 0.79 B2/B8: N/A Total: 0.79</p> <p><i>Growth Only</i> B1: 0.93 B2/B8: 0.20 Total: 1.13</p>	<p><i>Net Change</i> B1: 3.16 B2/B8: -17.76 Total: -14.60</p> <p><i>Growth Only</i> B1: 3.72 B2/B8: 0.82 Total: 4.54</p>	38.40 – Local Only	<p><i>Net Change</i> 53.00</p> <p><i>Growth Only</i> 33.86</p>	Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors

Source: Vale of Glamorgan CBC/BE Group, 2022

Recommendation 2 – Employment Land Provision and Protection

- 9.7 This Study has identified that, as of summer 2022 the Vale has a total of 177.54 ha of realistically developable employment land across eight sites which were allocated Policy MG9 of the adopted LDP 2011 – 2026 (2017), plus land associated with another relevant planning consent. **Evidence suggests that the Vale needs most of this land supply to meet needs. Also, that the strategic sites will meet a diverse range of economic needs and provide an ongoing draw for inward investment across the lifetime, and potentially beyond the lifetime, of the RLDP which justifies their ongoing allocation. It is also noted that netting down some sites, to remove undevelopable areas or land to be used for infrastructure, etc., will reduce the total supply, particularly for the strategic sites.** It is also noted that the 177.54 ha could support 13,978 jobs, based on current assumptions, during and beyond the RLDP period,
- 9.8 With this in mind, Table 40 provides recommendations on the employment sites in the Vale, including providing evidence of the deliverability of those sites, where relevant.

Table 40 – Employment Land Recommendations

Policy ID.	Name	Realistic Land Supply, ha (net)	Protect for B-Class use the in the new LDP?	Evidence of Deliverability/ Recommendations
Strategic Sites				
MG9.1 and MG9.11	Land to the South of Junction 34 M4 Hensol	MG9.1 Strategic: 29.59 MG9.11 Local: 6.64	Yes	After some years of inaction there are now firm plans to deliver a major expansion to the Renishaw plant here, by 2024 and detailed requirements from a range of other major employers. Thus, significant take up of land is likely here, early in the LDP period. Accordingly, both strategic and local land should continue to be strongly protected for B1/B2/B8 uses in the Replacement LDP.
MG9.2	Land adjacent to Cardiff Airport and Port Road, Rhoose (part of St Athan - Cardiff Airport Enterprise Zone)	61.05 ha developable under current plans	Yes	There are two key investors who continue to express a strong interest in delivering strategic schemes here. Delivery of the new Cardiff and Vale College Campus would be a key anchor facility to encourage further investment, particularly on the rest of the Council's land. Delivery of a large proportion of the identified land thus remains likely to 2038, supported by wider Welsh policy including the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment. The site should continue to be protected in the Replacement LDP as strategic employment land. At present, the realistically developable area of employment land within the wider allocation is some 61.05 ha, including Model Farm and the Airport Business/Commercial Park and excluding land proposed for a Country Park /environmental mitigation and the Advanced Technology Centre as a non B-Class facility.
MG9.3	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone or Bro	48.5 developable as the next phase	Yes	The Aerospace Business Park, Bro Tathan, has proved the most active employment area in the Vale, drawing in extensive inward investment, most notably Aston Martin Lagonda. Negotiations are underway for further large scale inward investment, confidential at this time, which will complete the

Policy ID.	Name	Realistic Land Supply, ha (net)	Protect for B-Class use the in the new LDP?	Evidence of Deliverability/ Recommendations
	Tathan)			<p>reuse/redevelopment of the Northern Zone of Bro Tathan. The area should be strongly protected in the Replacement LDP for B-Class uses. The new allocation should be focused on the Eastern Zone (48.5 ha) of Bro Tathan as this is identified by stakeholders next development area, with land available from 2025 (after it has seen some £30 million in infrastructure investment from Welsh Government, from committed funds) and development here expected to progress over the rest of the LDP period. After this it is not clear if any more development land can be provided at Bro Tathan, without the loss of key air infrastructure.</p> <p>See also Recommendation 3 below which recommends that the full range of B1, B2, B8 be permitted here, not just aerospace businesses, reflecting the diversity of development which has been achieved on the Northern Zone.</p> <p>Stakeholders highlight that a key weakness of Bro Tathan is its lack of services, shops, hot food, etc. to support the 1,600 who work in the Enterprise Zone. Proposals which would provide ancillary services, compatible with the location, should be supported.</p>
<i>Sub Total</i>		139.14		
Local Sites				
MG9.4	Atlantic Trading Estate	6.21	Yes	These plots, along with adjacent Hayes Lane/Hayes Road have been a focus for local scale industrial and warehouse development in the Vale, in recent years, meeting both local needs and some unmet requirements from Cardiff. Two of the five plots of Atlantic Trading Estate have been developed, or are nearly developed, for a mix of industrial and warehouse uses. Thus, the remaining land continues to be of value to the Vale of Glamorgan and should continue to be protected for B-Class uses in the Replacement LDP.
MG9.5	Land at Ffordd y Mileniwm	7.65 less the area proposed for retail	Consider suitable alternative uses	The site has been on the market for a decade and has only attracted interest for retail and leisure. This may partially reflect the site's peripheral position in the core Barry Docks/Atlantic Trading Estate market area, but also likely the lack of site servicing and access, the costs of which will impact on viability. If judged appropriate on other matters, the commercial use proposed here would at least provide a new access point from which the rest of the site could be opened up for B-Class uses. Even with this new access in place however, it is unclear if the landowner has the resources and interest to market the remaining land for B-Class uses and to translate any market interest generated into concrete development proposals, securing development partners, etc. Thus, the deliverability of this site remains questionable even with the initial access provided. Delivering B-Class uses here may thus require a degree of external support and the land should not be allocated again in the Replacement LDP for B1, B2, B8 uses unless a clear 'way forward' can be agreed to open up the remaining land for relevant development.
MG9.6	Hayes Lane	0.0	No	Site is under development at the time of writing, with construction nearing completion. Thus, the land should now be considered part of the developed area of Atlantic Trading Estate and no longer represents employment development land available to meet future needs in the next LDP.
MG9.7	Hayes Road	0.0	No	Progress towards development here seems to have stalled due to landowner aspirations for a largely/fully residential scheme here, the need for extensive flood risk mitigation and likely the viability impacts of investing in that mitigation on any development. As no solution has been found to these issues in a decade it is difficult to be confident about deliverability here. Unless a solution to these issues can be found in the short term, it is not recommended that this site be allocated again, for B-Class

Policy ID.	Name	Realistic Land Supply, ha (net)	Protect for B-Class use the in the new LDP?	Evidence of Deliverability/ Recommendations
				uses, in the Replacement LDP.
MG9.8	Hayes Wood	1.90	Yes	The site falls within the core Atlantic Trading Estate/Barry Docks market area. While land to the north and north west has now been consented for, or is under development for, housing the adjacent Hayes Lane site has also now been developed for industrial units. This gives Hayes Wood, Barry a direct physical link to Atlantic Trading Estate and makes it a next logical step for growth here. Given this, and the lack of constraints on the land, it is thus recommended that the Council continue to protect this site for employment in the replacement LDP. It is noted that any development here would likely include B2 uses, reflecting the neighbouring developments.
MG9.9	Llandow Trading Estate	0.0	No	This land has seen no progress towards development in the nine years since the last Employment Land and Premises Study was completed, and the lack of investment in the nearby Trading Estate makes it hard to be confident that a large scale development can ultimately ever be brought forward here. Stakeholders also indicate that the sort of occupiers which are attracted to this area could not generate sufficient value to support a large new build development. A mix of uses, including higher value uses, may deliver the required extra value but the higher value uses which might provide this - retail, leisure and residential - would not be appropriate in this isolated rural area. A portion of the site has recently been sold and this may lead to an investment in that land. However, in the absence of this and in the absence of any other firm commitment to development from the other landowners, it is not recommended that this site be allocated again, for B-Class uses in the Replacement LDP.
MG9.10	Vale Business Park	12.40	Yes	Vale Business Park is a focus for market activity in the rural Vale. Although there has been no development activity on these sites in a decade, development elsewhere on Vale Business Park (the near completion of Stonehouse Business Park) proves that at least light industrial units can be viably and successfully developed here. Thus, there remains a reasonable prospect that this land can be brought forward for B-Class development, when required. The Council should therefore continue to protect the site for B-Class uses in the Replacement LDP.
None	Windmill Park, Hayes Road	3.60	Yes	Currently consented phases of Windmill Park have now been completed, but some 3.60 ha of land remains undeveloped to the west and is identified for future phases of the scheme. Given the success of Phases 1-2, further development of industrial and warehouse uses appears likely here and the outstanding land could usefully be identified as part of the Vale's employment land supply in the Replacement LDP.
None	Jordan Civils Ltd., Vale Business Park, Tumulus Way	0.0	No	Site now largely developed, forming part of the premises offer of Vale Business Park rather than future development land for the Vale.
<i>Sub Total</i>		<i>38.40*</i>		
Total		177.54		

Source: BE Group, 2022

*Total includes 6.64 ha of local supply included in the Land to the South of Junction 34 M4 Hensol.

9.9 As noted, the only site where there remains uncertainty about its suitability, or not, for re-allocation, for B-Class uses, in the Replacement LDP is Land at Ffordd y Mileniwm. While a commercial scheme would open the land up for other

development it is unclear if there is then the appetite to fully market and progress the rest of the land for B-Class development, without outside support. **It is therefore recommended that Land at Ffordd y Mileniwm not be allocated in the Replacement LDP, for B-Class uses, unless a clear delivery plan can be agreed between public and private partners agreeing responsibility and finance for site marketing, further infrastructure investment and development.**

- 9.10 Converting the realistic employment land supply into jobs indicates that the 177.54 ha could support up to 13,978 jobs. Some 21.6 percent of these jobs would be from the local supply, 3,019, and the remainder, 10,959, from the strategic supply. **Should the Council consider it appropriate to remove Land at Ffordd y Mileniwm from the employment land supply this would reduce the total net land supply to 169.89 ha's, which would have the capacity to support some 13,367 jobs.**

Recommendation 3 – Ensure Flexibility in the Uses Allowed at Bro Tathan, and Elsewhere

- 9.11 Text associated with '*Policy MG10 - St Athan - Cardiff Airport Enterprise Zone*' in the Adopted Vale of Glamorgan LDP (2017) reserves the Aerospace Business Park, St Athan Rhoose for "*aerospace related development*" only (para 6.62, Page 70, Section 6.0). This reflected the Welsh Government's intentions for the Enterprise Zone site as of 2015.
- 9.12 In practice much of the development at the Aerospace Business Park has been for uses outside of the aerospace sector, including Aston Martin (automotive) and data centre proposals. Reflecting this reality, the Welsh Government, in the Cardiff Airport and St Athan Enterprise Zone Strategic Plan 2018 – 2021, now identifies that the Aerospace Business Park can '*accommodate automotive and other non-aerospace businesses*' (Para 2, 5th bullet point, page 8, Section 4.0).
- 9.13 Reflecting the new position of Welsh Government, and the nature of achieved/proposed development on the site, **it is therefore recommended that the Council do not place any restrictions on the types of businesses which can locate on the Aerospace Business Park (Bro Tathan) in the RLDP, as long as their operations fall primarily into the B1, B2, B8 use classes. Restrictions should also be avoided on all other allocated employment sites to ensure the land retains the flexibility to meet changing market requirements over the period to 2036.**

Recommendation 4 – Employment Areas to be Retained

9.14 The 22 identified Employment Areas of the Vale have been reviewed, and Table 41 provides Area specific recommendations, this includes recommendations as to whether locations should be safeguarded or not, for B-Class uses, in the next LDP. Levels of LDP protection to be applied to each category of Employment Area are considered further in Recommendation 5.

Table 41 – Existing Employment Area Recommendations

Name	Size, ha	Recommendations (Safeguarding Yes/No/Maybe) Recommended Area Categorisation based on SEWSPG Categories
MD16.1: Barry Docks	76.88	Overall, a low quality area with many vacant or demolished units. The area does however continue to provide budget quality accommodation to a diverse range of local businesses, while the Docks continue to serve several key employers, including the Chemicals Complex. Considerable brownfield development land is found within the Port area and ABP has indicated that it is willing to open up the port fence to free up more land for occupation for non-port uses. Consequently, the site should be protected in the Replacement LDP. (Yes) Major Employment Site
MD16.2: The Chemical Complex, Barry	118.49	Major complex in use by several large employers and with considerable further growth land, the site should be strongly protected to safeguard the employment it provides. (Yes) Major Employment Site
MD16.3: Atlantic Trading Estate, Barry	15.06	Large employment site and a focus for local scale industrial development, meeting local business needs and attracting some investment from Cardiff. The site should be protected in the Replacement LDP. (Yes) Secondary Employment Site
MD16.4: Palmerston Trading Estate, Barry	2.04	Low quality terraced accommodation that provides low cost rental opportunities to local businesses. This site should be protected in the Replacement LDP. (Yes) Key Local Employment Site
MD16.5: Sully Moors Road Industrial Estate, Barry	3.15	Small site providing terraced units to local businesses. The site has a good level of occupancy and so should be protected in the Replacement LDP. (Yes) Key Local Employment Site
MD16.6: Ty Verlon Industrial Estate, Barry	11.24	Large, good quality industrial estate, with a high occupancy rate and providing accommodation to a range of local businesses. Consequently, it should be protected in the Replacement LDP. (Yes) Secondary Employment Site
MD16.7: Cardiff Road Business Park, Barry	3.29	Low quality terraced accommodation that provides budget cost rental opportunities to local businesses, including many trade firms. This site should be protected in the Replacement LDP. (Yes) Key Local Employment Site
MD16.8: Vale Enterprise Centre, Barry	1.82	Low quality terraced accommodation that still has a role providing low cost rental opportunities to local businesses and does offer some expansion and redevelopment opportunities on the main road frontage. This site should be protected in the Replacement LDP. (Yes) Neighbourhood Employment Site
MD16.9: St Hilary Court, Culverhouse Cross	1.16	Good quality site with full occupancy, supporting Cardiff's office market. This site should be protected in the Replacement LDP. (Yes) Key Local Employment Site

Name	Size, ha	Recommendations (Safeguarding Yes/No/Maybe) Recommended Area Categorisation based on SEWSPG Categories
MD16.10: Llandough Trading Estate, Llandough (Penarth)	5.34	Average/good quality industrial estate offering small to medium sized terraced accommodation with strong access. This site should be protected in the Replacement LDP. (Yes) Secondary Employment Site
MD16.11: West Point Industrial Estate, Llandough (Penarth)	5.33	Average/good quality industrial estate offering small to medium sized terraced accommodation with strong access and almost full occupancy. This site should be protected in the Replacement LDP. (Yes) Secondary Employment Site
MD16.12: Cardiff Airport / Airport Business Park, Rhoose	210.88	High quality, strategic site with full occupancy that is attractive to potential occupiers and offers good potential for long term growth on the adjoining strategic site. The site should be protected in the Replacement LDP. (Yes) Major Employment Site
MD16.13: MOD St Athan - Aerospace Business Park (part of St Athan - Cardiff Airport Enterprise Zone or Bro Tathan)	331.75	The Aerospace Business Park, Bro Tathan, has proved the most active employment area in the Vale, drawing in extensive inward investment, most notably Aston Martin Lagonda. Negotiations are underway for further large scale inward investment, confidential at this time, which will complete the reuse/redevelopment of the Northern Zone of Bro Tathan. The Eastern Zone (48.5 ha) of Bro Tathan as this is identified by stakeholders next development area, with land available from 2025 (after it has seen some £30 million in infrastructure investment from Welsh Government, from committed funds) and development here expected to progress over the rest of the LDP period. After this it is not clear if any more development land can be provided at Bro Tathan, without the loss of key air infrastructure. The full area should be strongly protected in the Replacement LDP for B-Class uses. Stakeholders highlight that a key weakness of Bro Tathan is its lack of services, shops, hot food, etc. to support the 1,600 who work in the Enterprise Zone. Proposals which would provide ancillary services, compatible with the location, should be supported. (Yes) Major Employment Site
MD16.14: Aberthaw Power Station	45.87	Current plans would see this site redeveloped for a mixture of mostly B-Class employment uses. However, the mix of uses has yet to be determined, and any delivery of premises could be 6-7 years away, given the scale of site preparation required. However, market interest in this location is strong, even at this very early stage so the chances of long term redevelopment for employment generating uses is good. This should be recognised in the Replacement LDP. (Yes) Major Employment Site
MD16.15: Aberthaw Cement Works	16.84	The Cement Works is in use and a major employer for the Vale and therefore should be protected in the Replacement LDP. (Yes) Major Employment Site
MD16.16: Heritage Business Park, Llantwit Major	1.79	Low quality terraced accommodation with full occupancy that provides low cost rental opportunities to local businesses. This site should be protected in the Replacement LDP. (Yes) Key Local Employment Site
MD16.17: Llandow Trading Estate.	11.50	Overall, a low quality area which is not well used. The land still has some role at present, accommodating several 'bad neighbour' uses which might struggle to find accommodation elsewhere. It should continue to be protected as an Employment Area in the Replacement LDP, for this reason. However, should these uses relocate, this location would represent a redevelopment opportunity to meet a range of future needs, for uses which would be appropriate for this rural location in terms of RLDP policy. The area owner has no plans or capacity to undertake a redevelopment themselves but remains open to offers from third parties. A major redevelopment for B-Class uses is unlikely in this isolated rural location though. Ongoing monitoring of conditions here, and possibilities for future investment, is also recommended. (Yes) Key Local Employment Site
MD16.18: Vale Business Park, Llandow	28.29	Large industrial estate, with a high occupancy rate and providing accommodation to a range of local businesses in the rural Vale. It should be protected in the Replacement LDP. (Yes) Secondary Employment Site
MD16.19: Dyffryn Business Park, Llandow	6.33	Although the quality of two of the hangars is not particularly high, the site is in full use accommodating several key local employers. It should therefore be protected in the Replacement LDP. (Yes) Key Local Employment Site

Name	Size, ha	Recommendations (Safeguarding Yes/No/Maybe) Recommended Area Categorisation based on SEWSPG Categories
MD16.20: West Winds Industrial Estate, Llangan	0.47	Good quality modern industrial estate, almost fully let and providing accommodation to a range of local rural businesses. It has good access and is an overall attractive site meaning it should be protected in the Replacement LDP (Yes) Key Local Employment Site
MD16.21: Renishaw, land south of Junction 34, M4.	11.58	High quality modern facility for a major employer, with good growth potential. The location should be strongly protected in the Replacement LDP. (Yes) Major Employment Site
Llandow South	4.79	Site in use as a waste paper facility by a local SME. The site should be protected in the Replacement LDP. (Yes) Key Local Employment Site

Source: BE Group, 2022

Recommendation 5 – Employment Area Protection

9.15 Policy MD16 of the adopted LDP protects 21 employment areas, excluding Llandow South. As Table 34 shows, this Study recommends that all of them, and Llandow South, continue to be protected in the RLDP. This includes MD16.17: Llandow Trading Estate which, despite its very low quality continues to accommodate several 'bad neighbour' uses which might struggle to find accommodation elsewhere. The Council should continue to monitor Llandow Trading Estate for any further signs of deterioration and any opportunities for investment and regeneration here.

9.16 In terms of more detailed protection the following additional comments are made.

Major Employment Sites

9.17 **Generally, we would suggest that the highest policy protections be given to the six identified Major Employment Sites.** Non - B Class uses should not normally be allowed in Major Employment Sites. However, it is recognised that the two parts of the Enterprise Zone, which are isolated from the Vale's main settlements, there is a need for some ancillary services to serve the large populations which are, and will be, working from here and increase the market attractiveness of these locations. However, such uses should still be avoided where they conflict with strategic industrial and logistics operations and where substantial trade could be drawn away from the Vale's existing retail centres.

Secondary/Key Local/Neighbourhood Sites

9.18 **For the Employment Areas categorised Secondary down to Neighbourhood Sites, a more flexible approach could be taken to help facilitate a broad range**

of economic development, which is vital for the future sustainability and development of the local area's economy. In some cases, the size, location and characteristics of a site may mean that provision of **ancillary** non-B Class uses could provide greater benefit to the local community, in terms of addressing local needs, than if the whole site/property was retained solely in B1/B2/B8 employment use.

9.19 Uses which could be appropriate, as ancillary facilities, in mainly B-Class locations would include:

- Gyms – A useful service for a modern industrial estate to have and an attraction for businesses and workers to the location. Gyms can occupy underused industrial/warehouse/office space, without fundamentally altering buildings to the point where they could never be brought back into B1/B2/B8 operation.
- Nurseries/Children's Play Facilities – Again a useful service for a modern industrial estate to have, which can be accommodated in many types of office building, without fundamentally altering buildings to the point where they could never be brought back into B1/B2/B8 operation.
- Training Centres – There are a diverse range of training facilities run by both businesses and higher/further education institutions, which combine D1 training activities with B-Class operations. Flexibility is desirable to allow facilities which promote local skill development to find the space the need in, or close to, Employment Areas
- Petrol Filling Stations (PFS)/Electric Vehicle (EV) Charging Facilities – PFS/EV Charging Facilities can be a useful addition to an Employment Area, providing a useful local retail service while a forecourt shop will also meet the food needs of workers. A PFS/EV Charging Facility will take up a modest frontage site to an Employment Area and can co-exist with adjoining industrial uses with limited impacts
- A3 Hot Food – A modest hot food offer, proportionate to the size of the Employment Area, is again a useful service for an industrial estate/business park to provide to its workers and a way to enhance the attractiveness of a location. Some café, fast food and pub/restaurant chains will particularly want locations which allow them to serve business markets associated with large Employment Areas. As with most of the uses here, the cumulative impact of multiple A3 proposals needs to be considered, to ensure A3 uses do not crowd out B-Class uses or create alternative hot food hubs to local town

centres. The A3 offer here should be primarily concerned with supporting the employment uses.

- Hotels – Budget hotel chains such as Travelodge cater strongly for business travellers and will seek affordable locations which link to large business parks and industrial estates
- Some Trade/Motor Trade Uses – In practice, many Employment Areas already accommodate some trade uses which are increasingly common in smaller B8 units and can meet a diverse range of community and business needs. Trade uses can occupy smaller industrial estates and lower grade industrial/uses units which may struggle to attract modern manufacturing/warehouse uses. Care should be taken, however, to ensure that trade uses do not crowd out industrial and warehouse operators who are also competing for scarce floorspace. Ideally, trade uses should not account for more than a quarter of uses on large industrial estates.

9.20 Applications for such uses should be treated on their individual merits, including consideration of the sustainability and transport implications of out of centre developments and if the proposed facility would be ancillary to the core B-Class uses of the Area. Non-B Class development should, however, be avoided on Major Employment Sites.

9.21 Where non-B Class uses are proposed for, or within, Secondary/Key Local/Neighbourhood Sites then the Council should require the applicants to demonstrate that:

- The site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and
- The site/premises have been proactively marketed for employment purposes for a reasonable period (e.g., a minimum of 12-18 months) at a reasonable market rate (i.e., rent or capital value) as supported through a documented formal marketing strategy and campaign, or
- There will be a significant community benefit which outweighs the impact of losing the employment site/premises.

9.22 Where Employment Areas are at, or near to, capacity, as is true for most of the Vale's Employment Areas, then this provides evidence that their remains strong demand for B-Class premises. Applicants will have to provide correspondingly stronger evidence that their premises cannot meet any such demand.

- 9.23 Appendix 7: Developer Marketing Standards sets out a template for assessing the evidence that premises or sites have been appropriately marketed without success. Whilst these are primarily directed at B Use Class situations, they are equally applicable to other property types e.g., public houses, community facilities, etc.

Other Employment Locations

- 9.24 It is suggested that in terms of protecting employment properties that do not sit within Employment Areas, e.g., in the town centres, the redevelopment of employment land and premises for non B-Class employment uses be allowed in the following circumstances:
- The present (or previous, if vacant or derelict) use causes significant harm to the character or amenities of the surrounding area, and it is demonstrated that no other appropriate viable alternative B1/B2/B8 employment uses could be attracted to the site, or
 - Mixed-use redevelopment would provide important community and/or regeneration benefits with no significant loss of jobs, potential jobs, and the proposed mix of uses accords with other planning policies.
- 9.25 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed-use developments inappropriate on particular employment areas. It is clearly for the Council to judge proposals on their merits taking account of these factors.

Recommendation 6 – Aberthaw Power Station Redevelopment

- 9.26 It is anticipated that the RLDP period will see the redevelopment of Aberthaw Power Station, likely for a mix of B-Class and energy infrastructure uses although the exact mix of uses has yet to be defined. **The Power Station Site should be protected as a Regeneration Site in in the RLDP, for the mix of uses which is ultimately agreed in masterplanning.**

Recommendation 7 – Encourage Rural Diversification

- 9.27 Market evidence suggests healthy demand for rural B1/B2/B8 employment schemes. Demand is reasonable in the market towns of Llantwit Major and Cowbridge, and small business units have been successfully developed in various farm conversions. Planning policy should continue to encourage this trend which provides valuable B-Class employment premises to serve the Vale's broad rural area.

9.28 Agricultural diversification will be a key source of such premises, but it is about more than the reuse of farm buildings. Solus rural industrial/warehouse properties and, in the long term older, low grade, Employment Areas such as Llandow Trading Estate will provide opportunities for reuse or redevelopment to meet rural needs for B-Class premises or other uses appropriate to this location and reflecting RLDP Policy.

9.29 **A broader rural diversification policy is therefore recommended in the Replacement LDP which indicates support for B1/B2/B8 developments which are appropriate to their location in terms of:**

- **Access and traffic generation**
- **Scale and intensity of use**
- **Local landscape quality and environmental/ecological issues**
- **Impacts on neighbouring uses**
- **Signage requirements (both directional signage on surrounding roads and onsite signage)**
- **Sustainable development principles.**

9.30 Reuse of existing premises is always desirable but new development may also be needed to address all requirements and, subject to the above, should not be discouraged.

9.31 Policy should also encourage development for a mix of B-Class uses, i.e., not purely for office or industrial uses and, where possible, for a mix of tenures and price ranges. Rural businesses will need a diverse mix of premises, but experience suggests that rural schemes can concentrate too much on either high end accommodation or very low grade industrial space. While policy cannot enforce how much developers charge for space it can encourage a greater diversity of provision.

Recommendation 8 – Future Reviews

9.32 Paragraph 7.10 of the Welsh Government Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan, states that: *“Reviews of the whole evidence base, both larger than local and local studies, will most likely reflect the 4 year development plan cycle; however, an earlier review might be considered if certain employment land related targets are not being achieved and are identified through the LDP Annual Monitoring Report.”*

9.33 Locally, this report has shown how market conditions in the Vale of Glamorgan are evolving, with strong demand for industrial premises, particularly in Barry, partly influenced by supply shortages in Barry; a growing rural economy and development plans being progressed on a number strategic and local sites. **In view of these factors, it is recommended the Council should continue to review its employment land portfolio as part of plan review stages, approximately every 4 years post adoption, or where there are significant local changes identified as part of Annual Development Plan monitoring.**

APPENDIX 1

LIST OF CONSULTEES

Appendix 1 – List of Consultees

Blaenau Gwent County Borough Council

Bruton Knowles

Cardiff Capital Region

Cardiff City Council

Cardiff Metropolitan University

Commercial Direct HRT

Cushman and Wakefield

Dow Chemicals

Farmers Union Wales

Knight Frank

Llandough Community Council

Renishaw

RPS Planning

Savills

Vale of Glamorgan Council

Welsh Government

Welsh St Donats Community Council

APPENDIX 2

EMPLOYMENT SITE PROFORMAS

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land to the South of Junction 34 M4 Hensol
Site ID:	MG9.1 and MG9.11
Location:	Hensol

Photo:

Map:



Site Description:	Large greenfield plot located adjacent to large manufacturing facility for Renishaw just off the M4, junction 34
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Site Overview

Site Status:	Strategic and local expansion land in private ownership
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<p>Constraints, which relate to the whole Strategic Site, include:</p> <ul style="list-style-type: none"> •Watercourses, field boundaries and farm tracks cross the site. •Trees on site (multiple Tree Preservation Orders) •Includes land with a Site of Special Scientific Interest and a Special Landscape Area •Includes multiple other areas of high ecological value •Includes land protected for mineral resources and Sand/Gravel Allocation Areas •Multiple boreholes in the south east of the site •Partly in a flood risk area. The site contains some Zone B flooding which is mainly situated to the south of the site. The whole site (including the strategic allocation) has approximately 18.77Ha of Zone C2 flooding the majority of which is located in the northern area of the site. The site also has minor, intimate and major surface flooding on the site which is mainly in the northern area of the site. •Area has limited surface water drainage capacity •Wastewater treatment plant adjacent. <p>To address the primarily environmental constraints across the Strategic Site, the Outline Application provides for 31.55 ha of mitigation, including:</p> <ul style="list-style-type: none"> •A zone for revisions to earthform, diversion of watercourse and strategic drainage provision •Retained Tree Preservation Areas •10-metre-wide landscape buffer to railway line and setting •Open Space zone for ecological protection mitigation areas. •The indicative master plan approved as part of the outline planning consent shows the local employment area (labelled as site C), is located outside of constraint areas including the Zone C2 flooding.
Describe Intended Development:	<p>Planning consent 2014/00228/EAO proposes 92,903 sqm B8 warehouse allocation on 18.57 ha</p> <ul style="list-style-type: none"> •A 6.64 ha B1/B2 business park. <p>additional road access, to open up the remaining land for development are proposed on 1.45 ha (a hotel or residential training centre)</p> <p>Planning application 2019/01421/RES involved the first phase of development pursuant to outline permission 2014/00228/EAO while 2021/00899/EAO seeks to extend the period of time for submission of reserved matters by a further five years.</p> <p>Business Park</p> <p>Renishaw report lots of interest in this land, and is in confidential discussions with several parties for delivery. Broadly it is seeing demand from larger logistics operators and for data centres. Delivery also depends on if a Bypass and/or park and ride is delivered close to the site.</p> <p>Renishaw Factory and Expansion</p> <p>The existing factory comprises some 50,000 sqm employing 650 people, engaged in component manufacturing and some R&D. Have Reserved Matters consent for another 50,000 sqm, expected to employ 450-500. Renishaw have indicated that in 2022 it will commence development of 40,000 sqm of additional buildings, consisting of two new production halls and an employee welfare facility. The existing production halls will also be refurbished to reduce Renishaw's greenhouse gas emissions. The construction will be completed in phases, with a 15-month programme of work starting in July 2022 to build the first of the new halls (17,540 sqm), the welfare facility and supporting infrastructure. The basic shell for the second new production hall (18,190 sqm) will be built by December 2024 and will be fully constructed when business levels require its use. The details of the operations that will take place in each of the new halls is yet to be fully determined, but the additional capacity will allow for increases to machining operations and the assembly of products already built at the site, including Renishaw's metal additive manufacturing (3D printing) machine.</p>
Site Size (ha):	MG9.1 Strategic: 29.59 net (55.16 gross) MG9.11 Local: 6.64
Site Type:	Development site

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: _____	Gross Loss: _____
B2 (sqm)	Gross Gain: 52,948	Gross Loss: _____
B8 (sqm)	Gross Gain: 105,851	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Very strong access directly off the M4 at junction 34	
Overall Accessibility Score:	5	

Environmental Factors

Description:	The site is free from environmental problems and is clean and tidy. Site constraints addressed in the planning consents.	
Overall Internal Environment Score:		
Overall External Environment Score:	5	

Market Attractiveness

Description:	Discussions with Renishaw indicate there has been lots of interest in the land with discussions with several parties for delivery. Broadly it is seeing demand from larger logistics operators and for data centres. This is in addition to Renishaw's own expansion plans which are now programmed to come forward over the next two years.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	After some years of inaction there are now firm plans to deliver a major expansion to the Renishaw plant here, by 2024 and detailed requirements from a range of other major employers. Thus, significant take up of land is likely here, early in the LDP period. Accordingly, both strategic and local land should continue to be strongly protected for B1/B2/B8 uses in the Replacement LDP.	
Any other actions:		
Should the site be safeguarded or identified for employment uses?	Yes	

Vale of Glamorgan - Employment Land

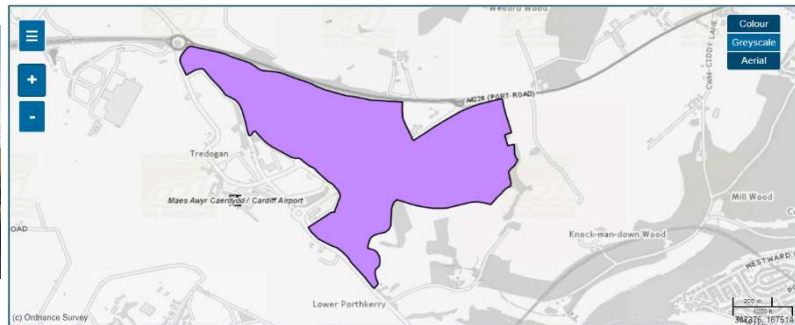
Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land adjacent to Cardiff Airport and Port Road, Rhose (part of St Athan - Cardiff Airport Enterprise Zone)
Site ID:	MG9.2
Location:	Rhose

Photo:

Map:



Site Description:	Large plot of greenfield land adjacent to Cardiff Airport and south of the A4226 Port Road, mostly in agricultural use.
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Site Overview

Site Status:	Strategic development site
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	Farm buildings, watercourses, field boundaries and farm tracks cross the site. Trees on site Land uneven and sloping in places A Public Right of Way runs along the eastern boundary of the site
Describe Intended Development:	<p>Part of the Enterprise Zone with the Aerospace Business Park. The wider Enterprise Zone will benefit from the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment. Several development projects proposed:</p> <p>1. Cardiff and Vale College Advanced Technology Centre - A £73.9 million new campus investment of 9,000 sqm, including a dedicated centre for advanced manufacturing, is proposed on some 2.7 ha of land off the Port Road entrance to the Airport and south east of the existing Airport Business Park (plus possibly another 1 ha to act as a buffer zone for future expansion). Development is subject to planning, the sale of Council land to the College (sale contract recently entered into), and the Welsh Government providing a financial mechanism for the college to finance the investment of between £50 million to £55 million, payable over 25 years through a Mutual Investment Model (Outline Business Case submitted to the Welsh Government in July 2022). The facility will house around 2,000 students and staff. The advanced manufacturing campus, based on strong links with employers, including those in the aerospace and automotive sectors, would replace the College's current smaller International Centre for Aerospace Training (ICAT) to the west. The cost of the investment will be offset by the College's sale of ICAT and its Colcot Road, Barry campus, which is expected to generate some £5 million in receipts. Initial planning would see development completed by 2026.</p> <p>2. Airport Business/Commercial Park - 16.3 ha, less the above Advanced Technology Centre, of (primarily) Council-owned land adjoining the existing Airport Business Park. Building on the Advanced Technology Centre proposal, the Council are looking to take forward for redevelopment the remainder of this land as a commercial/business park as per the SPG vision. A high level masterplan is now being prepared. There are no firm development plans at this time. Development would likely either be via a Joint Venture between the Council and a developer partner or a land sale to a relevant party, possibly linked to the adjacent Model Farm proposals (see below).</p> <p>3. Model Farm - Based on the Legal and General owned land in the east of the site, south of Port Road. A Hybrid planning application (App. No.2019/00871/OUT) was submitted for, in outline, the demolition of existing buildings and erection of 44.75ha Class B1/B2/B8 Business Park, car parking, landscaping, drainage infrastructure, ecological mitigation and ancillary works and, in full, and a change of use from agricultural land to country park. This proposed the development of B1, B2, B8 premises along the southern side of Port Road and environmental mitigation/country park to the south. An approval of the application was quashed by the High Court in October 2021, following concerns being raised with issues including the publicity of viability evidence. The application remains under review. Agents for Legal and General have confirmed that the investor remains committed to a development here but is taking the long term view about when the scheme might come forward. It still sees strong potential here for a high-quality business cluster reinforced by Cardiff and Vale College's investment nearby. It has a development partner for the project.</p>
Site Size (ha):	76.64 (77.4 gross) - 61.05 ha developable under current plans excluding the Advanced Technology Centre as mostly non B-Class
Site Type:	Development site

Proposed Floorspace Change on Site

Estimate based on existing published development plans.

B1 Office (sqm)	Gross Gain: 59,524	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 59,524	Gross Loss: _____
B2 (sqm)	Gross Gain: 59,524	Gross Loss: _____
B8 (sqm)	Gross Gain: 59,524	Gross Loss: _____
Other Uses (sqm)	Gross Gain: 9,000	Gross Loss: _____

Market Potential

Accessibility

Description:	Strong access off the A4226 and adjacent to Cardiff Airport with its public transport links.
Overall Accessibility Score:	5

Environmental Factors

Description:	The site is greenfield. The main issue would likely be noise pollution from the Airport.
Overall Internal Environment Score:	
Overall External Environment Score:	4

Market Attractiveness

Description:	Despite some issues with the planning process, there are two key investors who continue to express a strong interest in delivering strategic schemes here. Delivery of the new Cardiff and Vale College Campus would be a key anchor facility to encourage further investment.
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Does the site have a reasonable prospect of being developed/re-developed?	Yes
Is the market currently investing in the area?	Yes
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	4

Other Site Considerations

Adverse Impacts

Description:		
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	There are two key investors who continue to express a strong interest in delivering strategic schemes here. Delivery of the new Cardiff and Vale College Campus would be a key anchor facility to encourage further investment, particularly on the rest of the Council's land. Delivery of a large proportion of the identified land thus remains likely to 2038, supported by wider Welsh policy including the Vale's inclusion in the South East Wales Growth Area, a focus within Wales for economic development and investment. The site should continue to be protected in the Replacement LDP as strategic employment land. At present, the realistically developable area of employment land within the wider allocation is some 61.05 ha, including Model Farm and the Airport Business/Commercial Park and excluding land proposed for a Country Park /environmental mitigation and the Advanced Technology Centre as a non B-Class facility.	
Any other actions: Should the site be safeguarded or identified for employment uses?	Yes	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

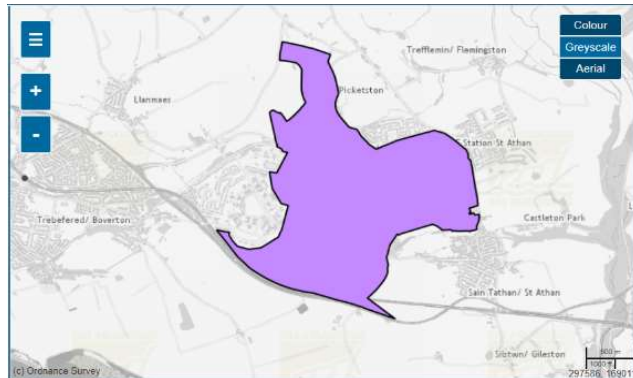
Site Details

Site Name:	Aerospace Business Park, St Athan Rhoose (part of St Athan - Cardiff Airport Enterprise Zone or Bro Tathan)
Site ID:	MG9.3
Location:	Rhoose

Photo:



Map:



Site Description:	Strategic Business Park comprising the partial redevelopment and reuse of the St Athan MOD facility and now including aircraft maintenance facilities and a strategic manufacturing facility for Aston Martin.
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Site Overview

Site Status:	Strategic development site	
Designations:	Allocated in adopted LDP MG9 employment allocations	
Constraints:	<p>Surface water drainage, particularly the obstacle limitation surface on the runway. Echo/maintenance area. structures that will need to be demolished. Landscape and standing water restrictions owing to the risk of attracting birds. Shallow bedrock and potentially high water table. Potential presence of archaeological remains. for localised ground contamination.</p>	<p style="text-align: right;">Aeronautical constraints, Operational clearance zone of taxiway Existing buildings, hard surfaces and other</p> <p style="text-align: right;">Potential</p>
Describe Intended Development:	<p>The Business Park is subject to a range of relevant consents: Planning application 2016/00890/FUL involved phase 1 building operations, comprising the conversion and alteration of the northern part of the existing support building to provide upgraded reception areas, offices, meeting rooms, kitchen, staff cafeteria and exhibition area together with changes to external circulation and parking, and landscaping. Planning application 2017/00756/FUL involved phase 2 Building Alterations, comprising of proposed loading bays and infilling existing covered area. Planning application 2019/01260/HYB was a hybrid application for 'full planning permission for the demolition of existing structures and for the construction of a new service road, building slab/apron and associated drainage; and outline planning permission for erection of up to 40,000 m2 gross air-side operational employment facilities, vehicle parking, servicing and all associated building and engineering works. Planning application 2016/01367/FUL proposed storage buildings within a fenced compound Planning application 2015/01133/FUL was for the erection of a single-storey helicopter training facility Planning application 2020/00434/OUT involved outline planning permission for the demolition of existing buildings and erection of Class B1 floorspace (up to 3,000 sqm), revised access onto Cowbridge Road, associated internal access routes, parking areas, fencing, landscaping, building and engineering operations. The application has been approved but is subject to s106 agreement.</p> <p>The whole of St Athan comprises 486 ha, of which 146 ha is developable, net of the airfield, etc. Within that developable area:</p> <ul style="list-style-type: none"> •Northern Zone (32 ha) – Now largely full, with the final plot under offer to a confidential party. This final plot comprises 10,000 sqm in four buildings on 8 ha •Eastern Zone (48.5 ha or 51.3 ha gross) – This will be the next development area. The MOD will vacate this area in Summer 2023, with the land then transferred to the Welsh Government. The site will then be cleared and serviced, with £30 million of Welsh Government funding allocated for this. The Eastern Zone will be ready for new development by 2025, with various high level discussions underway as to what could go there. • Western Zone (81 ha gross) - Comprises much of the air infrastructure. Unlikely to see much new development. •Southern Zone (8 ha) – The 'rotary zone' providing helicopter facilities for the Police and Coastguard. This could provide long term development land but would need considerable infrastructure investment to link it to the rest of the area. Development here is unlikely within the Replacement LDP period to 2036. 	
Site Size (ha):	208 (305 gross) - 48.5 developable as the next phase	
Site Type:	Development site	

Proposed Floorspace Change on Site

Complex ad subject to variation

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: _____	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Comparatively rural site, accessed by B-Roads only. Extensive investment in the site access and immediate surrounding highways infrastructure. Stakeholders highlight a lack of on site and nearby amenities (shops, hot food, etc.) as one constraint on its success and operation.	
Overall Accessibility Score:	3	

Environmental Factors

Description:	The site has been subject to a range of physical constraints, mostly related to the previous use an MOD facilities. Major investment is underway to address most issues, with the noise of aircraft likely to be the only lasting issue.	
Overall Internal Environment Score:		
Overall External Environment Score:	4	

Market Attractiveness

Description:	Since 2015 the Aerospace Business Park has proved the most active employment facility in the Vale, in terms of the scale and extent of the investment which it has attracted. In 2019, Aston Martin Lagonda opened its Production and Technology Centre in three 'super hangars' on a 36 ha site in the centre of Bro Tathan. Further, plans could see another 41,000 sqm of production space developed for this company to the west of its existing operations. Aircraft maintenance companies Caerdeve and e-Cube have also expanded extensively within Bro Tathan and now occupy large hangars each. At the time of writing there were 26 main private businesses operating from the Aerospace Business Park, with confidential discussions underway with a number of further investors.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	Key constraints being addressed by ongoing investment	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	<p>The Aerospace Business Park, Bro Tathan, has proved the most active employment area in the Vale, drawing in extensive inward investment, most notably Aston Martin Lagonda. Negotiations are underway for further large scale inward investment, confidential at this time, which will complete the reuse/redevelopment of the Northern Zone of Bro Tathan. The area should be strongly protected in the Replacement LDP for B-Class uses. The new allocation should be focused on the Eastern Zone (48.5 ha) of Bro Tathan as this is identified by stakeholders next development area, with land available from 2025 (after it has seen some £30 million in infrastructure investment from Welsh Government, from committed funds) and development here expected to progress over the rest of the LDP period. After this it is not clear if any more development land can be provided at Bro Tathan, without the loss of key air infrastructure.</p>	
Any other actions:	<p>Stakeholders highlight that a key weakness of Bro Tathan is its lack of services, shops, hot food, etc. to support the 1,200 who work in the Enterprise Zone. Proposals which would provide ancillary services, compatible with the location, should be supported.</p>	
Should the site be safeguarded or identified for employment uses?	Yes	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

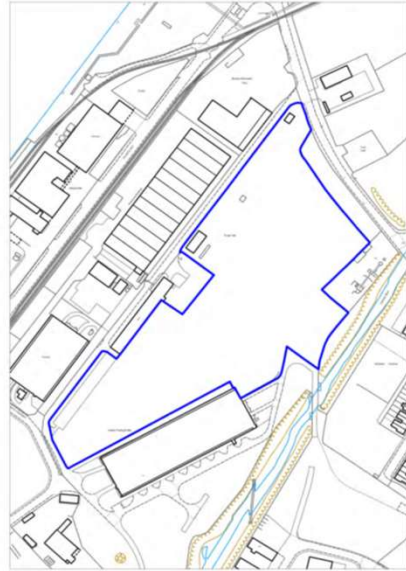
Site Details

Site Name:	Atlantic Trading Estate
Site ID:	MG9.4
Location:	Barry

Photo:

Atlantic Trading Estate

Map:



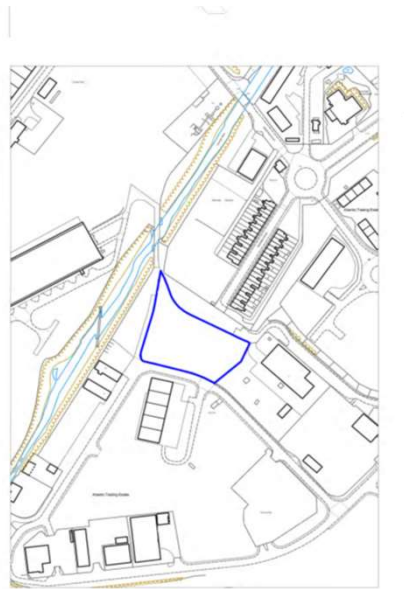
Plot 6a Atlantic Trading Estate



Plot 6b Atlantic Trading Estate



Plot 8 Atlantic Trading Estate



Plot 3B Atlantic Trading Estate



Site Description:	Five brownfield sites situated in the middle of a large mixed industrial estate to the rear of Berry Docks.
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Site Overview

Site Status:	Multiple private brownfield development plots
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<ul style="list-style-type: none"> •Future development of the site should be subject to consultation with Natural Resources Wales (NRW) given the sites' proximity to environmental designations and local water resources e.g. Severn Estuary SAC and SPA, major ground water aquifer, Cadoxton River, Site of Special Scientific Interest, known flood zones. •Varying flood risks across the five plots •NRW has advised that a detailed Flood Consequence Assessment will be required. •Limited surface water drainage capacity. An upgrade to the local sewerage system may be required to accommodate future development proposals. •Archaeological evaluations will be required prior to development. On the south east boundary there is possible archaeological interest (burial site), GGAT should be consulted. •Local power supply issues are known to exist across the area •The plot 'Atlantic Trading Estate' is located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site.

Describe Intended Development:	Atlantic Trading Estate - Land is owned by ABP and forms part of a wider 21 ha site, known as Atlantic Crescent, which is on the market, to let, for storage / development plots. Clearance/remedial works required prior to occupation. Plot 6a - West of site is now developed an in use for open storage/small workshops for two trade businesses. The east of the site is under construction for a 4,459 sqm Resource Recovery Facility for the Council. 2.14 ha developed/nearly developed. Plot 6B - Site under developer ownership, LJ Developments, no identified plans for development at this time Plot 8 - Site under developer ownership, LJ Developments, and cleared. No identified plans for development at this time Plot 3B - Fully developed and let as 'Atlantic Point', 14 light industrial units totalling 754 sqm on 0.79 ha
Site Size (ha):	9.14 (8.35 less the developed Plot 3B and 6.21 also less 6a)
Site Type:	Development site

Proposed Floorspace Change on Site

Existing developed space, with other land at 3,900 sqm/hectare

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>8,827</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>8,073</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>12,532</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Somewhat in the backlands, south of Barry Docks and the Chemicals Complex.	
Overall Accessibility Score:	2	

Environmental Factors

Description:	The site is in close proximity to the port with the potential for contamination from previous uses and several waste and chemicals storage facilities on Atlantic Park itself.	
Overall Internal Environment Score:		
Overall External Environment Score:	2	

Market Attractiveness

Description:	Stakeholders identify Atlantic Trading Estate/Barry Dock as a focus for demand for local industrial units of 150-2,000 sqm. Also as a location which is likely to attract market interest from Cardiff, given the industrial supply shortages in the City. The location has also been a focus for local industrial and warehouse development projects in the Vale, with one scheme completed and fully occupied.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	Possible contamination from historic and neighbouring uses in places
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Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	Maybe
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Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	These plots, along with adjacent Hayes Lane/Hayes Road have been a focus for local scale industrial and warehouse development in the Vale, in recent years, meeting both local needs and some unmet requirements from Cardiff. Two of the five plots of Atlantic Trading Estate have been developed, or are nearly developed, for a mix of industrial and warehouse uses. Thus, the remaining land continues to be of value to the Vale of Glamorgan and should continue to be protected for B-Class uses in the Replacement LDP.
Any other actions:	
Should the site be safeguarded or identified for employment uses?	Yes

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

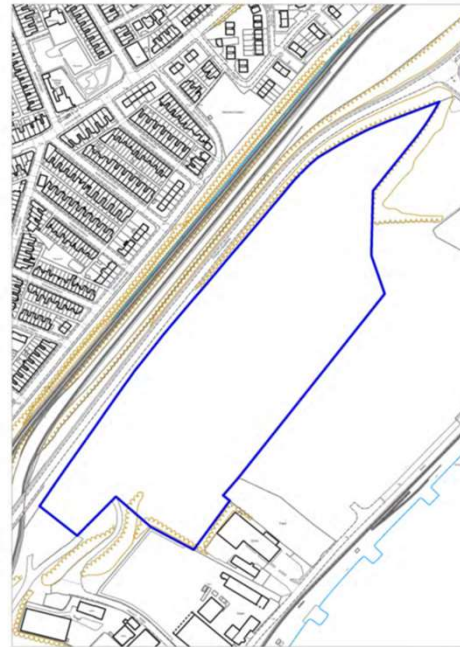
Site Details

Site Name:	Land at Ffordd y Mileniwm
Site ID:	MG9.5
Location:	Barry

Photo:



Map:



Site Description:	Large, linear area of irregularly shaped brownfield land, located off a main route through Barry town and sitting north west of Barry Docks
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Site Overview

Site Status:	Privately owned development land
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<ul style="list-style-type: none"> •Development brief required, related to adjacent Waterfront Redevelopment Area. •Close to an existing landfill site and flood risk zones, a detailed Flood Consequence Assessment may be required. •Some upgrading of nearby water treatment facilities (Bendricks Sewage Pumping Station) may be required. •Archaeological surveys required. Archaeology may ultimately restrict the net developable area. •Site located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site. •There is Zone B flooding along the southern boundary and minor surface flooding to the North West corner of the site. •This is a brownfield site with little nature conservation value. Notwithstanding this, consultation on future development proposals will be undertaken with the Council's ecologist through the normal planning application process if required. •The land is also subject to a clawback provision, allowing the previous owner to share in any uplift in value generated by a retail development on the site. This same clause also prevents residential development on the site. Prospects for B1/B2/B8 development are not affected.
Describe Intended Development:	<p>The land has been on the market for sale or to let, for mixed use development opportunities comprising B1, B2, B8 and other uses for over a decade. The location has not attracted significant interest for B-Class uses, over that time. In 2014, the landowner had discussions with a developer for a mixed retail and hot food scheme on 2.43 ha in the centre of the site. An indicative price was agreed for the sale of the land which would have involved the developer also providing services to the site and creating a new access. At the time, the owner felt that this did not offer the best disposal option for them so decided to withdraw from the sale. The site has since remained vacant and stakeholders indicate that the owner does not have the desire and experience to provide the infrastructure needed to facilitate development.</p> <p>In 2021, a commercial use identified the Site as its preferred location for a new facility, to be developed on 1.25 ha in the centre of the site. The proposed development would include a new access road off Ffordd y Mileniwm into the site. This will open up access to the remaining land.</p>
Site Size (ha):	8.9 (7.65 less the area proposed for non B-Class uses)
Site Type:	Development site

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: _____	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: 1,777	Gross Loss: _____

Market Potential

Accessibility

Description:	Situated on a main road with good access through Barry to the A4055 and a range of services nearby, including Barry Docks Railway Station. A clear site access point has yet to be established however.	
Overall Accessibility Score:	4	

Environmental Factors

Description:	This site is adjacent to a range of dockland uses which may generate, noise or other types of pollution but offers enough land for mitigation to be provided. Other issues such as Flood Risk only affect modest areas of the site.	
Overall Internal Environment Score:		
Overall External Environment Score:	3	

Market Attractiveness

Description:	The site has been on the market, for sale, for a range of uses, for over a decade. In that time the only significant interest attracted has been for retail and leisure schemes. The lack of demand for B-Class uses will likely reflect the land's relative separation from the core Barry Docks/Atlantic Trading Estate market area for industrial uses. Additionally, the fact that the landowner has been unwilling or unable to provide the access required to open up the site for development for the industrial units of 150-2,000 sqm which are in demand.	
Does the site have a reasonable prospect of being developed/re-developed?	Maybe	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		2

Other Site Considerations

Adverse Impacts

Description:		
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	Yes
Is there benefit in retaining the site for employment purposes?	Maybe

Viability

Are there considered to be any viability issues in bringing the site forward?	Yes
If yes to the above, please elaborate:	Viability is constrained by the need to provide a large new access junction, access road through the site and other servicing across an area of land larger than some of the small plots which have been successfully developed at Atlantic Trading Estate and at Hayes Road to the south. Other issues include the clawback provision, allowing the previous owner to share in any uplift in value generated by a retail development on the site, also flood risk issues and the potential need to contribute towards improving local water treatment facilities.

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site has been on the market for a decade and has only attracted interest for retail and leisure. This may partially reflect the site's peripheral position in the core Barry Docks/Atlantic Trading Estate market area, but also likely the lack of site servicing and access, the costs of which will impact on viability. If judged appropriate on other matters, the proposed commercial use would at least provide a new access point from which the rest of the site could be opened up for B-Class uses. Even with this new access in place however, it is unclear if the landowner has the resources and interest to market the remaining land for B-Class uses and to translate any market interest generated into concrete development proposals, securing development partners, etc. Thus the deliverability of this site remains questionable even with the initial access provided. Delivering B-Class uses here may thus require a degree of external support and the land should not be allocated again in the Replacement LDP for B1, B2, B8 uses unless a clear 'way forward' can be agreed to open up the remaining land for relevant development.
Any other actions:	
Should the site be safeguarded or identified for employment uses?	Maybe

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Hayes Lane
Site ID:	MG9.6
Location:	Barry

Photo:



Map:



Site Description:	Small parcel of brownfield land found adjacent to Atlantic Trading Estate, now under construction for an industrial scheme.
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Site Overview

Site Status:	Local employment site, now largely developed
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	Any constraints addressed by the present construction
Describe Intended Development:	Planning application 2018/01317/FUL saw a full consent granted for the construction of six portal framed buildings and associated roads and the division of buildings to form 42 light industrial units. The scheme, known as Atlantic Business Park was under construction, as of May 2022, for 6,000 sqm of floorspace by Dawan Developments. Atlantic Business Park is being developed in three phases, with the first 13 units ready for occupation by April 2022. The units are available from 135 sqm, or multiples thereof, and are being sold with a virtual freehold – a lease of 999 years. Between 30 and 40 per cent of the units are already pre-sold at the time of writing.
Site Size (ha):	1.40
Site Type:	Development site

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 6,000	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Somewhat in the backlands, south of Barry Docks and the Chemicals Complex.	
Overall Accessibility Score:	2	

Environmental Factors

Description:	The site is away from the Port and with mostly low polluting uses surrounding, notably housing.	
Overall Internal Environment Score:		
Overall External Environment Score	4	

Market Attractiveness

Description:	Site is being developed for industrial space, some 40 percent of which has been sold off plan, to date. This suggests good market interest. Achieved sale prices are £110 - £115/sqft (£1,184-1,238/sqm).	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?

Recommendations

<p>Recommendations on the future of the site:</p>	<p>Site is under development at the time of writing, with construction nearing completion. Thus the land should now be considered part of the developed area of Atlantic Trading Estate and no longer represents employment development land available to meet future needs in the next LDP.</p>	
<p>Any other actions:</p>		
<p>Should the site be safeguarded or identified for employment uses?</p>	<p>No</p>	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Hayes Road
Site ID:	MG9.7
Location:	Sully

Photo:



Map:



Site Description:	Partly wooded brownfield site with coastal frontage
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Site Overview

Site Status:	Brownfield development site under private ownership
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<ul style="list-style-type: none"> •Development is restricted to B1 uses, recognising the value of this location in fulfilling a need for high quality B1 sites and reflecting the adjacent Sully Hospital •The site is in close proximity to the Hayes Point to Bendricks Rock Site of Special Scientific Interest and consultation with NRW will be required to ensure no adverse impact on this designation. •Medium/high risk of contamination from previous uses. Natural Resources Wales has advised that if ground works are proposed a Preliminary Risk Assessment will be required prior to development to assess the potential risk of contamination from historic landfill •Area has limited surface water drainage capacity •The frontage of the site to Hayes Road includes 0.683 ha of land in the C2 flood zone. A detailed Flood Consequences Assessment may be required.
Describe Intended Development:	<p>The site had an Outline consent for 6,000 sqm of B1 light industrial accommodation on the main road frontage (App. No. 2010/00619/OUT), but this lapsed in 2017. The intention was that this would sit alongside a residential scheme on the rest of the site. Accordingly an Outline application for 130 to 173 dwellings was submitted in 2013 (App. No. 2013/00630/OUT). However, this second application was not progressed by the applicant and after some years of inaction the Council disposed of the application in November 2018. It is understood that the applicant has, over the last decade been seeking a largely or fully residential scheme but that housing has been identified, by Council officers, as unacceptable due to the flood risk from the site's coastal position. A development mix, satisfactory to the landowner has not been identified at the time of writing.</p>
Site Size (ha):	7.50
Site Type:	Development site

Proposed Floorspace Change on Site

Assumed unlikely to be developed

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: _____	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Access to the site is off a good quality road but it still sits in the backlands behind the Chemicals Complex and somewhat distant from the A Roads.	
Overall Accessibility Score:	3	

Environmental Factors

Description:	The site was recently a diesel storage facility so there is the risk of contamination. Otherwise the site has been cleared. As discussed above, flood risk appears to be a significant barrier to development here.	
Overall Internal Environment Score:		
Overall External Environment Score:	1	

Market Attractiveness

Description:	Site broadly falls within the Atlantic Trading Estate/Barry Docks market area which stakeholders identify as a focus for demand for local industrial units of 150-2,000 sqm. Also as a location which is likely to attract market interest from Cardiff, given the industrial supply shortages in the City. The barrier to delivery appear to be site specific, namely landowner aspirations for housing and flood risk.	
Does the site have a reasonable prospect of being developed/re-developed?	No	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		3

Other Site Considerations

Adverse Impacts

Description:	Likely contamination from past uses	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	Yes	

Alternative Uses

Is the site in demand or needed for alternative uses?	Maybe
Is there benefit in retaining the site for employment purposes?	No

Viability

Are there considered to be any viability issues in bringing the site forward?	Yes
If yes to the above, please elaborate:	Land contamination. Potentially the need for mitigation along the coastal and flood risk areas.

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	Progress towards development here seems to have stalled due to landowner aspirations for a largely/fully residential scheme here, the need for extensive flood risk mitigation and likely the viability impacts of investing in that mitigation on any development. As no solution has been found to these issues in a decade it is difficult to be confident about deliverability here. Unless a solution to these issues can be found in the short term, it is not recommended that this site be allocated again, for B-Class uses, in the Replacement LDP.	
Any other actions:		
Should the site be safeguarded or identified for employment uses?	No	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

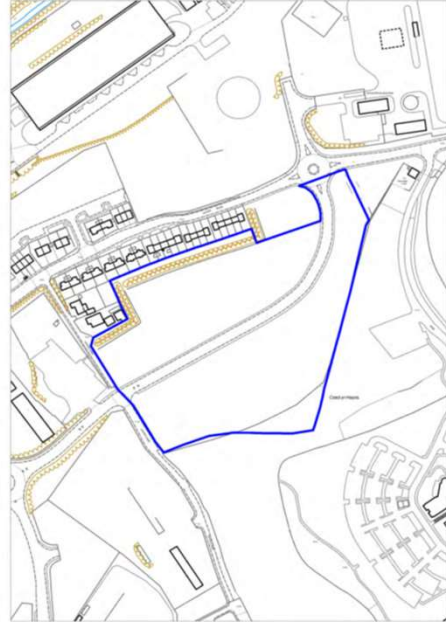
Site Details

Site Name:	Hayes Wood
Site ID:	MG9.8
Location:	Barry

Photo:



Map:



Site Description:	Small, irregularly shaped brownfield site on the edge of the now developed area of Atlantic Trading Estate
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Site Overview

Site Status:	Publicly owned brownfield development site
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<ul style="list-style-type: none"> •Some further drainage infrastructure is required. Further consultation with Welsh Water is needed •Ancient area of Semi Natural Woodland to the south, along with the Hayes Point to Bendricks Rock Site of Special Scientific Interest. Consultation with NRW is recommended. •Class B2 uses will not be acceptable due to the potential conflict with existing and proposed dwellings. •The north eastern corner of the site is located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment uses for this site.
Describe Intended Development:	No identified development plans.
Site Size (ha):	1.90
Site Type:	Development site

Proposed Floorspace Change on Site

At 3,900 sqm per Hectare		
B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>2,470</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>2,470</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>2,470</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Somewhat in the backlands, south of Barry Docks and the Chemicals Complex.
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Overall Accessibility Score:	2
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Environmental Factors

Description:	The site is away from the Port and with mostly low polluting uses surrounding, notably housing.	
Overall Internal Environment Score:		
Overall External Environment Score	4	

Market Attractiveness

Description:	Site falls within the Atlantic Trading Estate/Barry Docks market area which stakeholders identify as a focus for demand for local industrial units of 150-2,000 sqm. Also as a location which is likely to attract market interest from Cardiff, given the industrial supply shortages in the City. While land to the north and north west has now been consented, or is under development for housing the adjacent Hayes Lane site has also now been developed for industrial units. This gives Hayes Wood, Barry a direct physical link to Atlantic Trading Estate and makes it a next logical step for growth here.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		4

Other Site Considerations

Adverse Impacts

Description:	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	Maybe
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	Although the site constraints do put some limits on what can be delivered here, none generate significant abnormal costs which may impact on financial viability. It is also noted that, apart from the above, the site is serviced and road access, to the site edge, is in place. Thus development costs elsewhere are reduced

Further Comments

Any further comments?	
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Recommendations

<p>Recommendations on the future of the site:</p>	<p>The site falls within the core Atlantic Trading Estate/Barry Docks market area. While land to the north and north west has now been consented for, or is under development for, housing the adjacent Hayes Lane site has also now been developed for industrial units. This gives Hayes Wood, Barry a direct physical link to Atlantic Trading Estate and makes it a next logical step for growth here. Given this, and the lack of constraints on the land, it is thus recommended that the Council continue to protect this site for employment in the replacement LDP. It is noted that any development here would likely include B2 uses, reflecting the neighbouring developments.</p>	
<p>Any other actions: Should the site be safeguarded or identified for employment uses?</p>	<p>Yes</p>	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

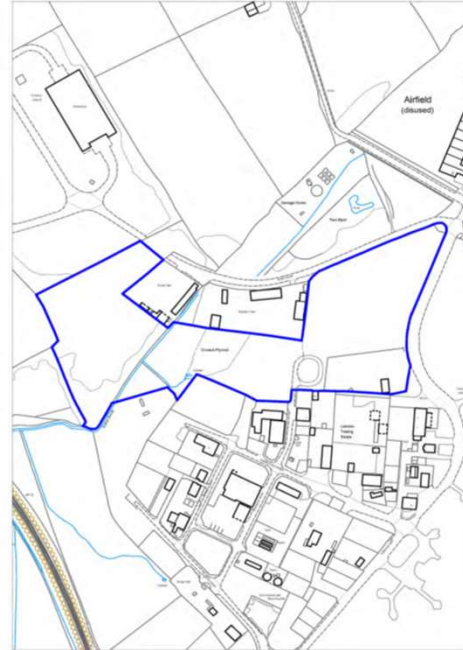
Site Details

Site Name:	Llandow Trading Estate
Site ID:	MG9.9
Location:	Llandow

Photo:



Map:



Site Description:	Brownfield/greenfield land on the edge of a low quality industrial estate, located in a rural area, accessed via a narrow road off the B4270.
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Site Overview

Site Status:	Privately owned expansion land
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<ul style="list-style-type: none"> •NRW have advised that the site(s) are known to drain to a carboniferous limestone aquifer from which ground water is abstracted and restrictions may therefore be imposed on certain uses. Consultation with NRW on any future development proposals will therefore be required •Preliminary Risk Assessment (PRA) would be required prior to development to assess the potential risk of contamination from historic landfill as the site is known to lie within 250 metres of a former landfill site. •Potential limitations on drainage processes •A roost of lesser horseshoe bats is located within 400 metres of the site and a full ecological assessment will be required. •Archaeological survey required •A stream (Sutton Brook) crosses the site, plus several lesser water courses. Careful planning of drainage required but flood risk is limited •Foul flows from some of the sites are accommodated by private sewage treatment works and consultation with the operator may also be required. •Site located within a HSE consultation zone. However, this isn't anticipated to represent a constraint on future employment
Describe Intended Development:	No planning consents on the site. 1.65 ha in the north east of the site, at the junction of Bona Road and Tumulus Way, has recently been sold, on a 999 year long lease as a development opportunity site. The identity of the purchaser, or their plans for the site remain confidential at this time.
Site Size (ha):	6.80
Site Type:	Development site

Proposed Floorspace Change on Site

At 3,900 sqm per Hectare

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>8,840</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>8,840</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>8,840</u>	Gross Loss: _____

Other Uses (sqm)

Gross Gain: _____

Gross Loss: _____

Market Potential

Accessibility

Description:	Access is modest as it is in a rural area, accessible only via a narrow and, in places potholed, road off the B4270	
Overall Accessibility Score:	2	

Environmental Factors

Description:	The surrounding area includes some uses which may produce waste and pollution including the Harris Pye site, Travis Perkins and a number of smaller waste processors on the industrial estate to the south.	
Overall Internal Environment Score:		
Overall External Environment Score:	2	

Market Attractiveness

Description:	The owners of the developed Llandow Trading Estate owners report good demand from low value tenants, with all the lettable yards in the area now let to organisations such as those repairing historic buses, builders and boat builders. However, demand from these low value occupiers does not support new employment development and is unlikely to ever do so unless a wider investment and regeneration scheme, likely mixed use, could be put together.	
Does the site have a reasonable prospect of being developed/re-developed?	Maybe	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		1

Other Site Considerations

Adverse Impacts

Description:		
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Maybe

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	<p>The impact of the identified geological, ecological and archaeological issues will require assessment at planning application stage. Such issues are not uncommon for rural development sites. Drainage issues may add some costs to development but there is no evidence that these would be extensive enough, by themselves, to inhibit delivery.</p> <p>It is understood that B1, B2, B8 uses are not restricted by the presence of the groundwater aquifer in terms of development, rather in terms of what substances can be stored on the site.</p>

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	<p>This land has seen no progress towards development in the nine years since the last Employment Land and Premises Study was completed, and the lack of investment in the nearby Trading Estate makes it hard to be confident that a large scale development can ultimately ever be brought forward here. Stakeholders also indicate that the sort of occupiers which are attracted to this area could not generate sufficient value to support a large new build development. A mix of uses, including higher value uses, may deliver the required extra value but the higher value uses which might provide this - retail, leisure and residential - would not be appropriate in this isolated rural area.</p> <p>A portion of the site has recently been sold and this may lead to an investment in that land. However, in the absence of this and in the absence of any other firm commitment to development from the other landowners, it is not recommended that this site be allocated again, for B-Class uses in the Replacement LDP.</p>
Any other actions:	
Should the site be safeguarded or identified for employment uses?	No

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

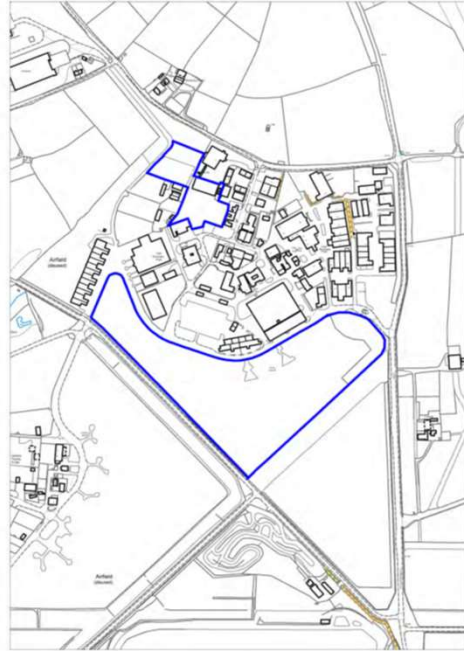
Site Details

Site Name:	Vale Business Park
Site ID:	MG9.10
Location:	Cowbridge

Photo:



Map:



Site Description:	Two expansion sites for a large rural industrial estate, including a large greenfield expansion plot to the south (MG9.10a) and a smaller brownfield plot to the north west (MG9.10b).
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Site Overview

Site Status:	Privately owned expansion land
Designations:	Allocated in adopted LDP MG9 employment allocations
Constraints:	<p>Natural Resources Wales have advised that the sites are known to drain to a carboniferous limestone aquifer from which ground water is abstracted and restrictions may therefore be imposed on certain uses. Consultation with NRW on any future development proposals will therefore be required.</p> <p>Natural Resources Wales (NRW) is aware that a European protected species has been recorded in the vicinity of the site and an ecological assessment will be required in support of any future planning application</p> <p>Natural Resources Wales (NRW) is aware that a European protected species has been recorded in the vicinity of the site and an ecological assessment will be required in support of any future planning application</p> <p>The Glamorgan Gwent Archaeological Trust has advised that an Archaeological Evaluation will be required in determining any planning application for development.</p> <p>Plot MG9.10b - Aggregate, shipping containers and the remains of demolished buildings on the site</p>
Describe Intended Development:	No identified development plans
Site Size (ha):	12.4 ((MG9.10a = 10.80, MG9.10b =1.60)
Site Type:	Development site

Proposed Floorspace Change on Site

At 3,900 sqm per Hectare

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 16,120	Gross Loss: _____
B2 (sqm)	Gross Gain: 16,120	Gross Loss: _____
B8 (sqm)	Gross Gain: 16,120	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	The site is in a rural area but benefits from being located directly on the B4270, with reasonable links to Cowbridge and Llantwit Major	
Overall Accessibility Score:	3	

Environmental Factors

Description:	The site is free from environmental problems and is a relatively clean and tidy. The site does not produce any particular pollutants and therefore the surrounding uses are not detrimentally affected by activities on the site	
Overall Internal Environment Score:		
Overall External Environment Score	4	

Market Attractiveness

Description:	Demand in the rural Vale is very localised either servicing the market towns of Llantwit and Cowbridge or small local businesses operating as part of the wider regional supply chain. Vale Business Park offers a wide range of good quality business space with a generally high occupancy level. While no development has occurred on the sites themselves, light industrial units have been developed on another plot within the Business Park (Stonehouse Business Park) and are understood to be performing well, demonstrating that new employment space can be viably delivered here.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		4

Other Site Considerations

Adverse Impacts

Description:	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	<p>The impact of the identified geological, ecological and archaeological issues will require assessment at planning application stage. Such issues are not uncommon for rural development sites. It is understood that B1, B2, B8 uses are not restricted by the presence of the groundwater aquifer in terms of development, rather in terms of what substances can be stored on the site.</p> <p>Highway improvement conditions have the potential to impact on financial viability, but any impact will be dependent on the scale of contributions required. It is noted that Vale Business Park has historically developed in a piecemeal manor, including a number of developments for owner occupation. Further growth will likely follow a similar pattern and it is not clear when, or if, the requirements for highways upgrades would be triggered.</p>

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	Vale Business Park is a focus for market activity in the rural Vale. Although there has been no development activity on these sites in a decade, development elsewhere on Vale Business Park (the near completion of Stonehouse Business Park) proves that at least light industrial units can be viably and successfully developed here. Thus, there remains a reasonable prospect that this land can be brought forward for B-Class development, when required. The Council should therefore continue to protect the site for B-Class uses in the Replacement LDP.
Any other actions:	
Should the site be safeguarded or identified for employment uses?	Yes

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

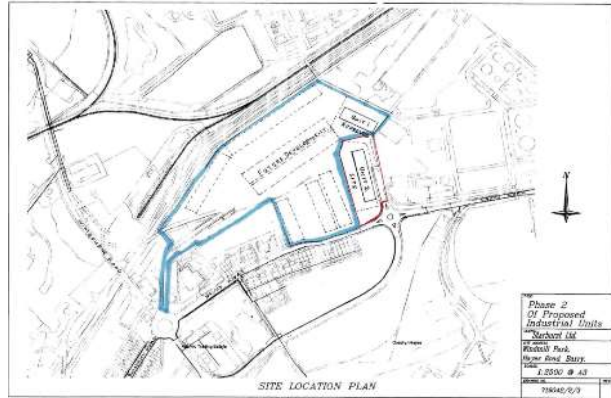
Site Details

Site Name:	Windmill Park, Hayes Road
Site ID:	None
Location:	Barry

Photo:



Map:



Site Description:	Phase Two expansion of a growing modern industrial estate, west of the Chemicals Complex and part of the wider Barry Employment cluster
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Site Overview

Site Status:	Small brownfield planning consent, now completed
Designations:	Falls into Chemicals Complex Employment Area under LDP policy MD16
Constraints:	Assumed none as development has progressed
Describe Intended Development:	Planning consent 2019/00406/FUL for 1,792 sqm of B1/B2/B8 industrial/warehouse development (Phase 2), together with associated parking and access arrangements. At the time of writing all consented floorspace appears to have been developed. Some 3.60 ha of brownfield land remains available for further development to the west.
Site Size (ha):	0.64
Site Type:	Development site

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: _____	Gross Loss: _____
B2 (sqm)	Gross Gain: 1,792	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	Somewhat in the backlands, south of Barry Docks and the Chemicals Complex.	
Overall Accessibility Score:	2	

Environmental Factors

Description:	Site developed for modern, good quality accommodation	
Overall Internal Environment Score:		
Overall External Environment Score:	5	

Market Attractiveness

Description:	Site falls within the Atlantic Trading Estate/Barry Docks market area which stakeholders identify as a focus for demand for local industrial units of 150-2,000 sqm. Also as a location which is likely to attract market interest from Cardiff, given the industrial supply shortages in the City. Two phases of Windmill Park have been successfully delivered to date and appear well occupied with the assumption that more can be delivered on land to the west.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:		
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	Currently consented phases of Windmill Park have now been completed, but some 3.60 ha of land remains undeveloped to the west and is identified for future phases of the scheme. Given the success of Phases 1-2, further development of industrial and warehouse uses appears likely here and the outstanding land could usefully be identified as part of the Vale's employment land supply in the Replacement LDP.	
Any other actions:		
Should the site be safeguarded or identified for employment uses?	Yes	

Vale of Glamorgan - Employment Land

Potential Development Sites - Qualitative Site Information

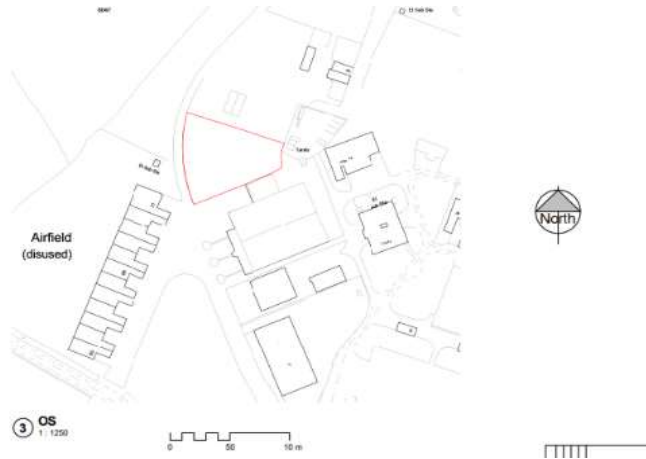
Site Details

Site Name:	Jordan Civils Ltd., Vale Business Park, Tumulus Way
Site ID:	MG9.13
Location:	Llandow

Photo:



Map:



Site Description:	Small brownfield site located within a large rural industrial estate, now partly developed for 949 sqm of light industrial accommodation.
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Site Overview

Site Status:	Partly developed brownfield infill site.
Designations:	Falls into Vale Business Park Employment Area under LDP policy MD16
Constraints:	Assumed none as development has progressed.
Describe Intended Development:	Planning consent 2016/01322/FUL for the erection of one large building contain six small starter industrial units (850 sqm total, 135/137 sqm each), and one small standalone industrial unit of 99 sqm. At the time of writing the large building was complete, with units on the market, to let as Stonehouse Business Park. The smaller building was under construction.
Site Size (ha):	1.05
Site Type:	Development site

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 949	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	The site is located in a rural area but benefits from being located directly on the B4270, within an established Industrial estate	
Overall Accessibility Score:	4	

Environmental Factors

Description:	The site is free from environmental problems and is a relatively clean and tidy. The site does not produce any particular pollutants and therefore the surrounding uses are not detrimentally affected by activities on the site	
Overall Internal Environment Score:		
Overall External Environment Score	4	

Market Attractiveness

Description:	Demand in the rural Vale is very localised either servicing the market towns of Llantwit and Cowbridge or small local businesses operating as part of the wider regional supply chain. Vale Business Park offers a wide range of good quality business space with a generally high occupancy level. Stonehouse Business Park is understood to be performing well, with multiple lettings completed to date	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:		
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No
Is there benefit in retaining the site for employment purposes?	Yes

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	Site now largely developed, forming part of the premises offer of Vale Business Park rather than future development land for the Vale.	
Any other actions:		
Should the site be safeguarded or identified for employment uses?	No	