
Chorley, Preston & South Ribble

Employment Land Review to 2021

April 2009

Chorley, Preston & South Ribble

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1. Study Context

- 1.1 Drivers Jonas and WM Enterprise were commissioned in May 2007 to prepare an Employment Land Review for the Central Lancashire Area, in accordance with good practice guidance and relevant planning policy, on behalf of Chorley Borough Council, Preston City Council and South Ribble Borough Council.
- 1.2 This section provides background to the study in terms of:
- n Aims and Objectives;
 - n The Brief;
 - n Context; and
 - n Outputs

Aims and Objectives

- 1.3 The aims and objectives of this study, derived from the Councils' brief can be summarised as:
- n Identifying employment sites and buildings to be retained for employment uses and those which could be released to other uses;
 - n Identifying the future quantity of land required;
 - n Assessing these requirements based on different scenarios arising from different growth levels and emerging external strategic policy drivers; and
 - n Identifying in broad terms the quantity, location and type of sites needed to meet future employment land requirements.

The Brief

- 1.4 The Employment Land Review has been commissioned to examine the economic needs and development needs of the Central Lancashire Area in terms of future land provision, covering both urban and surrounding rural areas, for the period up to 2021. The review is also required to integrate the work and findings of the Central Lancashire City: Office Need Assessment prepared by Drivers Jonas (together with QESR) in 2006.
- 1.5 The review will provide objective evidence in support of policy decisions relating to the promotion of a strong, stable, productive and competitive economy in the area in line with the provisions of PPS1. This review will inform Local Development Framework Documents for the three local authority areas, and will assist in ensuring an adequate supply of employment land across the study area through to 2021.
- 1.6 Specific issues to be considered as part of the study set out in the brief include:
- n The amount and type of employment land required up to 2021;
 - n Retention or release of existing older employment areas, sites and premises;
 - n Individual employment sites/ premises which are not on estates or identified as allocations;
 - n Potential for mixed use development;
 - n An assessment of vacancy rates and availability of types and mixes of premises;
 - n Employment land provision in rural areas to support rural diversification;

- n The role of planning policies in promoting small units to accommodate new and small businesses to ensure a strong mixed economy;
 - n Improving the prospects of rural and market town economies;
 - n Potential obstacles to development of individual employment sites;
 - n Appraisal of current local plan policies (retention of employment land) to assess whether the areas subject to these policies are appropriately protected; and
 - n Accessibility and spatial distribution on a Central Lancashire Area basis.
- 1.7 In line with national planning policy guidance and good practice, requirements for the following types of employment uses / sectors have been considered as part of the review:
- n Offices, both in town centres and elsewhere, including those for public administration;
 - n Light and general industry;
 - n Wholesale and freight distribution; and
 - n High technology premises, including research and development.

Context

- 1.8 National Planning Policy Statement PPS3 paragraph 44, highlights the importance of reviewing employment land. It states that local planning authorities should, in their previously-developed land strategies, consider whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated. An employment land review (carried out in accordance with ODPM good practice guidance) can identify if there is a realistic prospect of the allocation being taken up for its stated use during the plan period.
- 1.9 In accordance with the brief, the study has considered the Central Lancashire Area as a whole and analysis has also been provided for each of the three local authority areas. In addition the area has been divided into more detailed geographical areas to allow further analysis. A plan illustrating these boundaries is included at **Appendix 1**. A 'best fit' of study sub-areas using ward and super output areas is shown in **Table 1.1** below.

Table 1.1: Sub-Areas and Associated Wards

Local Authority Area	Sub Area	Ward	ONS Middle Layer Super Output Area*
Chorley Borough Council	Central	Clayton-le-Woods North	Chorley 001
		Clayton-le-Woods West and Cuerden	
		Clayton-le-Woods and Whittle-le-Woods	
		Astley Village and Buckshaw	
		Euxton North	
		Euxton South	
		Chorley North East	
		Chorley North West	
		Chorley East	
		Chorley South West	
		Chorley South East	
		Coppull	
		Adlington and Anderton	
	East	Brindle and Hoghton	Chorley 002
	Wheulton and Withnell	Chorley 004	

Local Authority Area	Sub Area	Ward	ONS Middle Layer Super Output Area*
Preston City Council		Pennine Heath Charnock and Rivington	Chorley 014
		West	Lostock Eccleston and Mawdesley
	City Centre	Town Centre	Preston 017
	Inner Area	St Matthews	Preston 011
		St Georges	Preston 012
		Fishwick	Preston 014
		Deepdale	Preston 015
		University Moor Park Tulketh	Preston 016
	Western Suburbs	Lea	Preston 005
		Ingol	Preston 008
Riversway		Preston 010	
Cadley		Preston 013	
Greyfriars Ashton Larches			
Eastern Suburbs	Ribbleton	Preston 003	
	Brookfield	Preston 004	
	College	Preston 006	
	Sharoe Green Garrison	Preston 007 Preston 009	
Rural	Preston Rural East	Preston 001	
	Preston Rural North	Preston 002	
South Ribble Borough Council	Leyland and Farington	Farington West	
		Farington East	
		Moss Side	South Ribble 012
		Earnshaw Bridge	South Ribble 013
		Golden Hill	South Ribble 014
		Leyland Central	South Ribble 015
		Seven Stars	South Ribble 016
		Lowerhouse	South Ribble 017
	Lostock Hall, Bamber Bridge and Penwortham	Howick and Priory	
		Whitefield	
		Broad Oak	South Ribble 001
		Middleforth	South Ribble 003
		Kingsfold	South Ribble 004
		Charnock	South Ribble 005
		Walton le Dale	South Ribble 006
		Bamber Bridge North	South Ribble 007
		Tardy Gate	South Ribble 008
Bamber Bridge West		South Ribble 009	
Bamber Bridge East			
Lostock Hall			
Eastern Parishes	Samlesbury and Walton Coupe Green and Gregson Lane	South Ribble 002	
Western Parishes	Longton and Hutton West	South Ribble 010	
	New Longton and Hutton East	South Ribble 011	
	Little Hoole and Much Hoole		

- 1.10 In terms of sub-area analysis, where possible boundaries identified in Appendix 1 have been applied although for a limited number of information sources concerning existing building stock, notably that derived from the Office of National Statistics, ward and super-output areas have needed to be used. This will not however impact on the overall study outputs or validity of conclusions.

Outputs

- 1.11 The review provides clearly defined recommendations for the study area as a whole arising from a detailed geographical analysis of quantified demand in terms of current, latent, expressed and future business needs. This is aligned to the assessment and forecasting of the location, quantity and quality of land and premises necessary to meet the needs of indigenous firms and likely inward investment. The recommendations seek to enable economic growth in a sustainable manner.

2. Outline of Approach and Methodology

2.1 This Employment Land Review has been undertaken in line with Government good practice guidance published by the OPDM (December 2004). The main stages of the study provide:

- n A review of the Central Lancashire Area's employment portfolio;
- n A picture of future requirements; and
- n Recommendations to ensure an appropriate portfolio of sites.

2.2 The stages are briefly described below. Further details on approach and methodology are set out in subsequent sections of this report.

Stage 1 – Taking Stock of the Existing Employment Situation

2.3 The first stage comprises the following key elements:

- n Review of policy and other baseline information;
- n Quantitative assessment of floor space (existing and proposed); and
- n Qualitative assessment of employment areas and sites.

Information Gathering and Review

2.4 As a starting point an inception meeting with Council officers was held to undertake an information gathering exercise. This enabled a comprehensive review of existing strategies, studies, policies and other data to identify a base of information.

Quantitative Assessment

2.5 The property profile in terms of quantum and broad distribution across the Borough has been assessed through a quantitative analysis of existing employment floor space by B1, B2 and B8 use class and also by employment sectors (office, manufacturing and warehouse / distribution).

2.6 Annual employment land monitor data supplied by the Councils has been interrogated to derive information on land and potential new floorspace availability arising from employment allocations and planning permissions granted (considering both gains and losses for employment arising from extant planning permissions). A review of the stock of existing occupied and vacant premises, mainly utilising details recorded on the 'Locate in Lancashire' website and also Office of National Statistics data, has been undertaken to provide a picture of the total stock of employment floor space in the study area and its relevant sub areas.

Qualitative Assessment

2.7 In accordance with good practice a detailed qualitative assessment of the main employment sites and areas (as defined by the Councils) has been undertaken based on a number of specific appraisal criteria. The criteria consider the following main factors:

- n Market (commercial) attractiveness; and
- n Sustainable environmental development/ strategic planning and economic development policy.

2.8 For this study a similar approach and scoring to qualitative assessment applied to the Office Needs Assessment has been utilised. It has been

adapted slightly however so that it can be robustly applied to other B Class employment uses. Through this qualitative assessment sites have been rated and placed in an overall ranking in the area's employment hierarchy.

Stage 2 – Creating a Picture of Future Employment Requirements

2.9 In order to create a picture of future requirements, the following analysis has been undertaken:

- n *Labour Market Review* – Provides an understanding of the structure and composition of the local labour market to inform forecasts;
- n *Labour Market Forecasts* – Projects forward the structure of the local labour market to 2021 in order to show how the labour market is expected to change over forthcoming years;
- n *Employment Land and Premises Projections* – Standard and locally derived square metre per employee information is used to translate premises requirements into an overall employment land requirement;
- n *Scenarios* – Consideration of the impacts of different economic scenarios on the amount of employment land needed;
- n *Employer Survey* – A survey of businesses in the Central Lancashire Area based on a bespoke questionnaire;
- n *Impact of each Local Authority* – forecasting for the Central Lancashire Area and for each of its constituent local authorities;
- n *Review of Market Trends and Demand* – An overview of market trends by location, sector and scale; and
- n *Impact and Implications of External Forces* – Identification of opportunities for inward investment and threats from the loss of major employers.

Stage 3 – Identifying a 'New' Portfolio of Sites

2.10 Through the combination of results obtained through stages 1 and 2 of the study (i.e. the assessment of future requirements / demand in the context of existing and potential future supply), the Report sets out various recommendations with a view to ensuring that a balanced, realistic and sustainable portfolio of employment land is provided.

3. Policy Context

3.1 This section provides an overview of planning, economic and other policy and strategy documents of relevance to this employment land review. Consideration is given to a range of strategies at the national, regional, sub-regional and council-wide levels to provide a comprehensive picture of the policy content influencing the study.

National Planning Policy Guidance

PPS1: Delivering Sustainable Development (2005)

3.2 The purpose of this statement is to set out the overarching planning policies for the delivery of sustainable and inclusive patterns of development through the planning system. Paragraph 5 of the PPS states that the four main objectives of the planning system are:

- Making suitable land available for development in line with economic, social, and environmental objectives to improve people's quality of life;
- Contributing to sustainable economic development;
- Protecting and enhancing the natural and historic environment, the quality and character of the countryside, and existing communities;
- Ensuring high quality development through good and inclusive design, and the efficient use of resources; and
- Ensuring that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with good access to jobs and key services for all members of the community.

3.3 In line with the Government's commitment to promoting a strong, stable and productive economy, planning authorities should provide for improved productivity, choice and competition ensuring suitable locations are available for industrial, commercial and other developments, whilst recognising that economies are subject to change.

PPS3: Housing (2006)

3.4 PPS3 aims to ensure local planning authorities provide sufficient developable land with planning permission to meet housing need and demand and to improve affordability. They must take account of market information and develop policies which can deliver. The priority for development should be previously developed land, in particular vacant and derelict sites and buildings. Regional and local planning authorities are expected to set Brownfield targets. There must be effective and efficient use of land and there is a strong emphasis on achieving high quality housing, especially design quality.

3.5 In terms of the effective use of land and targets for the re-use of land that has been previously developed, guidance notes (in paragraph 44) that:

"In developing their previously-developed land strategies, Local Planning Authorities should consider a range of incentives or interventions that could help to ensure that previously-developed land is developed in line with the trajectory/ies." This process should include, amongst other things: "Considering whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development."

PPG4: Industrial, Commercial Development and Small Firms (DoE, 1992)

- 3.6 Paragraph 3 of this guidance states that development plans must work towards giving industrial and commercial developers and local communities greater certainty about the types of development which will / will not be permitted in specific locations. Furthermore, paragraph 6 goes on to outline that:

“Policies should provide for choice, flexibility and competition. In allocating land for industry and commerce, planning authorities should be realistic in their assessment of the needs of business. They should aim to ensure that there is sufficient land available which is readily capable of development and well served by infrastructure. They should aim to ensure that there is sufficient land available to meet differing needs. A choice of suitable sites will facilitate competition between developers; this will benefit end-users and stimulate economic activity”.

- 3.7 Paragraph 9 states that:

“Industry and commerce have always sought locational advantage in response to various external factors. These include: the demands of customers; access to raw materials and suppliers; links with other businesses; the workforce catchment area; the various transport considerations. Business often gives high priority to good access to roads, and sometimes rail, airports and ports”.

- 3.8 With regards to the location of employment uses, the guidance suggests (paragraph 12) that some types of modern distribution facilities which have a low density of employment, but are served by a large number of lorries, are best located away from urban areas where there is good access to the strategic road network. Furthermore, it is recognised that it may no longer be appropriate to separate industry and commerce from the residential communities for whom they are a source of employment.

Consultation Paper on a new Planning Policy Statement 4: Planning for Sustainable Economic Development (December 2007)

- 3.9 PPS4 seeks to update PPG4: Industrial and Commercial Development and Small Firms and to incorporate relevant findings and recommendations set out Kate Barker’s ‘Review of Land Use Planning’ (December 2006) and subsequently in the White Paper ‘Planning for a Sustainable Future’ (May 2007). The overall emphasis of the emerging PPS4 is on urging local authorities in England to plan positively for economic development and to promote new business and economic growth “unless there is a good reason to believe the costs would outweigh the benefit”.
- 3.10 It is noted that specific planning tools are available to assist local planning authorities to support their economic goals, for example, through local development orders and simplified planning zones, thereby removing the need for separate planning applications. A flexible approach to the supply and use of land through planning policies will be important to ensure increased competition and enterprise, enhanced skills and innovation, increased job opportunities and greater investment. Regional planning bodies and local planning authorities should use a wide evidence base to understand both existing business needs and likely changes to the market. The evidence base should, for example, assess the existing supply of land through Employment Land Reviews, taking into account the nature and

character of the area, the needs of the location and different businesses, and available market data.

- 3.11 Local authorities should avoid the designation of sites for single or restricted use classes wherever possible and avoid carrying forward existing allocations where they cannot be justified. A broad range of business types should be catered for and local authorities should take a constructive approach to changes of use where there is no likelihood for demonstrable harm. The use of previously developed land and new uses for vacant or derelict buildings, including historic buildings and those in rural areas, should be encouraged. It should be recognised that a site may be an acceptable location for development even through it may not be readily accessible by public transport.

PPS6: Planning for Town Centres (2005)

- 3.12 Paragraph 1.8 identifies the range of town centre uses to which PPS6 applies. This includes offices, both commercial and those of public bodies.

- 3.13 PPS 6 promotes a sequential approach the location of major office developments, promoting first town centres, followed by edge of centre locations and then out of centre locations well served by public transport. Specifically it provides guidance on planning for offices in town centres and identifies that:

- An assessment of the need for new office floor space over the development plan document period should be carried out as part of the plan preparation and review process;
- Local need assessments will need to be informed by regional assessments and will form part of the evidence base for development plan documents; and
- The physical capacity of centres to accommodate new office development and the town centre's role in the hierarchy is also relevant to the planning for new office development.

PPS7: Sustainable Development in Rural Areas (2004)

- 3.14 Paragraph 2 states that local authorities should be aware of the circumstances, needs and priorities of the rural communities and businesses in their area in order that they can ensure that the policies contained within the local plan are relevant and effective.

- 3.15 With regards to the siting of development, paragraph 5 outlines that local planning authorities should:

*“1) Identify suitable sites for future economic development, particularly in rural areas where there is need for employment creation and economic regeneration.
2) Set out in local development documents their criteria for permitting economic development in different locations, including future expansion of business premises to facilitate healthy and diverse economic activity in rural areas”.*

PPG13: Transport (2001)

- 3.16 The key objective, set out in this guidance is to promote accessibility to jobs, shopping, leisure facilities, and services by public transport, walking and cycling. Local authorities are advised to consider this when preparing local development plans and assessing planning applications.

- 3.17 Paragraph 21 outlines that local authorities should review their development plan allocations and should allocate or re-allocate sites which are (or will be) highly accessible by public transport, for travel intensive uses (including offices). Conversely, less travel intensive uses should be located where public transport is less effective.
- 3.18 Paragraph 32 states that “*local authorities should adopt a positive, plan-led approach to identifying preferred areas and sites for B1 uses which are (or will be) as far as possible highly accessible by public transport, walking, and cycling*”.
- 3.19 Paragraph 30 states that development involving large amounts of employment should be located in city, town and district centres and near to major public transport interchanges.
- 3.20 Paragraph 44 concerns development within rural areas and states that

“In determining the appropriate strategy for employment in rural areas, it is important to consider the scale, impact and likely catchment of developments. Local authorities will need to weigh up policy concerns but in general terms, the larger the number of staff employed on site the greater the need to ensure that development is accessible by public transport, walking and cycling. Depending on the nature of use, this may mean locating larger employment uses in or next to a designated local service centre. Employment uses which are regional or sub-regional in scale should be located where they accord with regional planning guidance and where they offer a realistic choice of access by a range of transport modes”.

The Barker Review (2006)

- 3.21 Kate Barker was asked to lead an independent review of land use planning to consider how, in the context of globalisation, and building on the reforms already put in place in England, planning policy and procedures can better deliver economic growth and prosperity alongside other sustainable development goals. While the focus of the review was on economic issues, the recommendations also sought to advance environmental goals. Key themes contained in the review were: enhancing the responsiveness of the system to economic factors; improving the efficiency of the system to reduce the costs associated with delivering desired outcomes; and ensuring that there is an appropriate use of land.
- 3.22 The outcome of the review was a series of headline recommendations. Those of most relevance for this Employment Land Review include:-
 - Updating national policy on planning for economic development (PPS4) to ensure that the benefits of development are fully taken into account in plan-making and decision-taking, with a more explicit role for market and price signals;
 - Supporting the town centre first policy; and
 - Ensuring that new development beyond towns and cities occurs in the most sustainable way.
- 3.23 With regards to employment and employment land, the review suggests development plan policies should consider how the drivers of productivity can be supported, highlighting the benefits that employment and investment can bring an area and how they can be realised in their region / locality. Business interests therefore need to be taken into account as

development plan documents are being prepared to ensure the role of market signals are recognised and allocations are relevant and up to date. Allocations should comprise of a range of sites in terms of size, use class, accessibility and availability, whilst the plan as a whole should have strong links to infrastructure provision. In short, the Barker Review recommends that an elevated status should be attached to business and economic issues in the planning process.

Planning White Paper (2007)

3.24 The White Paper sets out the Government’s detailed proposals for reform of the planning system in response to the recommendations made by Kate Barker and others in respect of planning. The aim is to create a planning system that positively supports economic development and encourages greater investment, both domestic and foreign, in the UK economy.

3.25 The vision contained in the paper is for a:

“planning system which supports vibrant, healthy sustainable communities, promotes the UK’s international competitiveness, and enables the infrastructure which is vital to our quality of life to be provided, in a way that is integrated with the delivery of other sustainable development objectives, and ensures that local communities and members of the public can make their views heard.”

3.26 There is continued emphasis on the development of brownfield land and locating development in sustainable locations to reduce the need to travel. It further focuses upon town centre planning and the role of planning in dealing with climate change.

3.27 It is noted that to be competitive, business needs to respond much more quickly to changes in market conditions. Here, planning can help by being responsive and efficient, and supporting vital economic development in a way which ensures it is consistent with wider environmental and social objectives.

3.28 Changes in the way Local Planning Authorities approach and address economic development decisions are also suggested. In particular:

- In decision taking planning authorities should take full account of the longer term benefits, as well as the costs, of development that will create jobs, including those with wider benefits to national, regional or local economies by improving productivity and competitiveness;
- There will be a new approach to determining planning applications which do not have the specific support of plan policies, using market information as well as environmental and social information;
- Development plans should promote mixed-use development and respond to new forms of economic development enabling each locality to fulfill its potential; and
- Authorities should make better use of market information and other relevant evidence in planning for sustainable economic development and in considering specific proposals for development.

Employment Land Reviews Guidance Note, ODPM (2004)

3.29 This guidance note was prepared by Environmental Resources Management on behalf of the ODPM (now DCLG). The primary purpose of this guide is to provide planning authorities with effective tools with which to

assess the demand for and supply of land for employment. In particular, sites allocated for employment need to reflect the changing requirements of businesses and local economies. This guide seeks to help those in the planning system to assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those which are no longer suitable for other uses.

- 3.30 The document contains advice on how to approach undertaking employment land reviews, how the reviews should relate to and inform the Development Plan and sets out the following three stage approach to undertaking such reviews:
- Stage 1 – Take stock of the existing situation, including an assessment of ‘fitness for purpose’ of existing allocated employment sites;
 - Stage 2 – Compile a picture of future requirements by using a variety of means (i.e. economic forecasting, considering recent trends and/or assessing local property markets) to assess the scale and nature of likely demand for employment land and available supply in quantitative terms; and
 - Stage 3 - Identify a ‘new’ portfolio of sites by undertaking a more detailed review of site supply and quality. Identification and designation of new employment sites should also take place to create a balanced local employment land portfolio.
- 3.31 Paragraph 2.25 of the guide identifies that employment land reviews should focus on those employment land uses or premises which are within the scope of PPG4 (DoE 1992), specifically:
- Offices, both in town centres and elsewhere, including those for public administration;
 - Light and general industrial;
 - Wholesale and freight distribution; and
 - High technology premises, including research, business and science parks.
- 3.32 Our approach to this study takes account of relevant advice contained in this guidance note building it into our existing methodologies. It is acknowledged that this guidance note does not form a definitive statement of government policy; however it nevertheless provides reasonably up to date information on approaches to undertaking an employment land review.

Regional Policy

Regional Planning Guidance for the North West (RPG 13), Government Office for the North West (2003)

- 3.33 The current adopted regional policy guidance for the study area is Regional Planning Guidance for the North West (RPG 13 March 2003). The purpose of the guidance is to provide a regional spatial strategy and broad development framework for the Region within which local authority development plans and local transport plans can be prepared.
- 3.34 The overriding aim of RPG 13 is to promote sustainable patterns of spatial development and physical change. Key objectives therefore include achieving greater economic competitiveness and growth, securing urban renaissance, sustaining and reviving rural economies, securing a better image for the region and improving accessibility.

- 3.35 Chapter 2 (*Core Development Principles*) identifies a number of measures that will be used to help meet the aims of RPG. Those which relate more specifically to land for employment can be summarised as follows:
- Supporting and attracting the development of businesses and skills, especially those related to the key economic sectors identified in the Regional Economic Strategy;
 - Ensuring the integration of physical development;
 - Delivery of attractive mixed use neighbourhoods;
 - Reducing the need to travel through the location of uses which generate travel demand;
 - Focusing a significant amount of new development and investment in the centre and surrounding inner areas of the two big cities – Liverpool and Manchester/Salford – and those parts of other cities and towns that urgently require urban renaissance;
 - Developing and diversifying the economy of the rural parts of the Region;
 - Promoting economy in the use of land and adopting a sequential approach to meeting development needs; and
 - Restoring derelict and neglected land and buildings.
- 3.36 Four Core Development Policies are identified. This includes *DP4 (Promoting Sustainable Economic Growth and Competitiveness and Social Inclusion)*, which states that local authority development plan policies should ensure investment, to the fullest extent possible, to help grow the Region’s economy in a sustainable way and produce a greater degree of social inclusion. Opportunities should be taken to reshape and restructure the use of land to improve access to jobs and create compact mixed-use development on previously developed land within urban areas.
- 3.37 None of the identified key regeneration areas lie within the three Local Authority boundaries of this study; however Preston is identified (*in Policy SD3*) as a Key Town/City Outside the North West Metropolitan Area where development will be concentrated in line with continual conservation and sensitive integration to maintain and enhance the setting of this historic City.
- 3.38 “Economic Growth and Competitiveness with Social Progress” is addressed in Chapter 4. Policy EC1 (Strengthening the Regional Economy) states that development plans, in conjunction with local economic development strategies, should identify sites and premises for employment purposes which:
- Complement the Region’s sectoral priorities;
 - Take account of the needs of local businesses and communities and the need to ensure the modernisation and diversification of older manufacturing industries and their premises;
 - Are based on a review of existing commitments;
 - Have the potential to promote clustering;
 - Take account of the sequential approach;
 - Support the Spatial Development Framework; and
 - Take account of the availability of skilled labour and wider employment and training opportunities.

- 3.39 Further policies in the chapter relate to specific industries or sectors, identifying how development plans and strategies should plan for each. In summary, development plans should:
- Ensure the provision of sites which meet the changing needs of traditional manufacturing industry as well as new and emerging manufacturing activities, locating sites within key transport corridors or Regeneration Priority Areas - *Policy EC2*;
 - Facilitate the development of high quality sites for the knowledge based industries which have direct access to research establishments and are well located in relation to transport infrastructure – *Policy EC3*;
 - Consider the potential to promote the clustering of existing and new economic activities, making provision for ICT networks in locations near to Higher Education Institutions, major hospitals, research establishments or major technology-based business – *Policy EC4*;
 - Ensure new warehousing and distribution developments are located to avoid the unnecessary movement of goods by road taking into account preference for brownfield sites, proximity of local labour supply, access to the road and rail freight facilities, airports/ports and the need for sites to be of sufficient scale to allow for flexible development and expansion – *Policy EC7*; and
 - Directing office development (Use Class B1 (a) and A2) to suitable locations within or adjoining main city, town or district centres and near to major public transport interchanges in urban areas – *Policy EC8*.
- 3.40 Regional Investment Sites are identified in *Policy EC5*. This policy states that development plans should identify sustainable, accessible sites for strategic business investment which supports the Region’s sectoral priorities of the North West Regional Development Agency (NWDA). Additionally, Regional Investment Sites should support urban renaissance, the objectives of the Regeneration Priority Areas, areas of economic assistance and the RPG’s Core Development Principles.
- Northern Way Growth Strategy, Northern Way Steering Group (2004)*
- 3.41 Northern Way Documents underpin national planning strategy to influence and change policy at the regional level through the emerging Regional Spatial Strategies (RSS) and forms and umbrella over Regional Economic Strategy policies (RES). Working across the North the Strategy builds on the proposals in the three Regional Economic Strategies and is being led by the three Northern Regional Development Agencies (RDA’s). It seeks to develop a long-term vision for growing the economy for the whole of the North in order to
- “Establish the North of England as an area of exceptional opportunity, combining a world-class economy with a superb quality of life.”*
- 3.42 The key driver behind the Northern Way initiative is the need to achieve greater economic growth and reduce the productivity gap with the rest of the UK. The strategy suggests several actions to achieve the acceleration of economic growth. These include the identification of pan-northern investment opportunities, building upon the region’s strengths, defining the main investment priorities, thinking long-term sustainability in relation to both urban and rural areas, and focusing on the growth of the North’s eight identified City Regions.
- 3.43 To ensure objectives will be achieved, efforts will be concentrated on policy priorities including:

- Building a more entrepreneurial culture within the North to support innovation by every company;
 - Ensuring the North captures a larger share of global trade by supporting the expansion of key clusters of companies;
 - Investing significantly more in meeting the skills needs of employers and bringing more people into work;
 - Investing in creating better integrated public transport services within and between our city regions including better rail links between Manchester and Leeds;
 - Adopting a much bolder approach to creating truly sustainable communities; and
 - Marketing the North to the world.
- 3.44 Central Lancashire is identified as one of the eight City Regions, with Preston as the North West's third major city. The polycentric structure of the City Region offers exceptional opportunities gained from increased competitiveness, larger markets, greater skill base and greater ability to create specialist clusters. To achieve success however, there must be good connectivity within and between the City Region.
- 3.45 Preston is identified as a key economic generator in the City Region. For example since 1993 the service sector in Preston has widened by 38% with most growth in mainly business and professional services, the creative industries, digital industries, leisure and tourism. The City Region's knowledge base continues to grow with the University of Central Lancashire providing access to new technology, innovations and skills particularly in the development of aerospace.
- Draft Regional Spatial Strategy for the North West. North West Regional Assembly (2006)*
- 3.46 The emerging RSS provides the development framework for the region up to 2021. Once adopted this document will supersede the currently adopted RSS (former RPG 13), and will form part of the statutory development plan for Central Lancashire.
- 3.47 The key step change between the adopted and emerging regional strategies is the identification of Central Lancashire as a City Region to complement those established City Regions of Greater Manchester and Merseyside - a spatial focus which has emerged from the Northern Way proposals.
- 3.48 Strategy objectives continue to focus heavily on sustainable economic development including the production of a more competitive, productive and inclusive regional economy, with more people in employment that uses and develops their knowledge and skills.
- 3.49 Building on the Region's economic strengths, the strategy aims to identify a range of significant investment opportunities, including broad locations for Regional Investment Sites and Knowledge Nuclei. Ensuring that a forward supply of business land is identified in each sub region to ensure the growth of the economy is not constrained and promotion of infrastructure and clustering, where appropriate are also proposed. For Central Lancashire this is specifically seen as supporting the growth of advanced manufacturing/engineering, environmental technologies and biomedical, tourism and conferencing sectors.

- 3.50 The Regional Development Principles continue to be underpinned by making the best use of land, the sequential approach, alongside quality in developments and climate change. However, the focus on decision-making has emphasised the need for transparent and sustainable assessments.
- 3.51 The Strategy's Spatial Framework adopts a two-tier settlement hierarchy which promotes firstly, the Regional Centres (Manchester/Salford) and Regional Towns/Cities (including Preston) as being the main development locations to maximise growth opportunities as key economic drivers of the City Regions identified for support in the Northern Way. The second tier identifies Key Service Centres (including Chorley and Leyland) to support the surrounding villages and rural areas.
- 3.52 Regionally Significant Economic Development locations have been identified to attract inward investment and which will contribute to the growth and development of the regional economy only. These sites have been identified to fulfil a regional strategic need, over and above local land supply and will not be used for development that could easily be accommodated elsewhere.
- 3.53 The Central Lancashire City Region includes two such sites with the emphasis on being used for high quality manufacturing and potentially knowledge based industries. These sites are:
- Royal Ordnance, Chorley; and
 - Cuerden Regional Business Park, Preston.
- 3.54 With regards to supply of sub-regional and local employment land *Policy W3* states that a comprehensive review of sub-regional and local commitments (alongside Urban Potential Studies where possible) should be used to secure a portfolio of sites that are of an appropriate range in terms of market attractiveness and social, environmental and economic sustainability. There should be an appropriate balance between B1, B2 and B8 uses, the amount of brownfield land used should be maximised and at least 30% of sites should be available, so that all new and existing businesses have the ability to grow successfully. Consideration should be given to the scope of mixed-use development, the implications of home working and diversification of the rural economy. Finally office developments should be focused in key centres.
- 3.55 Specific policies for the Central Lancashire City Region place the main focus of economic growth on Preston supported by high quality investment sites in sustainable locations to meet the requirements of business and industry. Sites and business should be supported by the development of a high quality, integrated public transport network.
- 3.56 Key (employment related) priorities for the Central Lancashire City Region include:
- Development and implementation of the Preston City Vision;
 - Development of advanced manufacturing/aerospace industries and other knowledge based industries;
 - Provision of a portfolio of regional investment sites and knowledge nuclei sites in the broadly identified areas; and
 - Development of sub-regional employment opportunities.
- 3.57 Central Lancashire is considered to present the greatest opportunity for delivering sustainable economic growth based upon its polycentric

- geography. Growth should be primarily focused within the regional City of Preston.
- 3.58 The Greater Preston ‘Core Area’ of the City Region, identified as the administrative areas of Preston, South Ribble and Chorley, provides a significant economic focus for the sub-region which is to be implemented through the Preston City Vision and Core Area Strategy which will be developed into Local Development Framework Documents. Within this area the aerospace industries, advanced manufacturing and other knowledge-based sectors provide a key source of higher quality employment, which should be retained in the City Region.
- Draft RSS Examination in Public Representations (2006 – 2007)*
- 3.59 The Examination in Public (EiP) of the Draft RSS for the North West was held between 31 October 2006 and 15 February 2007.
- 3.60 The three Central Lancashire Authorities submitted their responses jointly, which can be summarised as follows:
- The Draft RSS spatial strategy does not sufficiently address the region’s priorities for growth, regeneration and investment and should be amended to recognise the status of the Central Lancashire Area;
 - The Central Lancashire City Region should be treated equally to other city regions;
 - A clear, sustainable and appropriate vision for the Central Lancashire City Region sub-region is not provided;
 - Proposals for employment land do not provide a steer on apportionment of employment land across the sub-region. Proposals for a Knowledge Nuclei Site within central Preston are supported, although there is no justification for relegating the status of the ‘North of Leyland/Bamber Bridge’ (on table 8.1 of policy W2) to a ‘reserve site’. The ‘focus for growth’ area should be extended southwards to include the Regional Investment Site at Royal Ordnance, near Chorley.
 - A ‘one size fits all’ approach has been adopted in relation to the Central Lancashire City Region which overlooks the role of the four growth centres (which includes Preston) within the polycentric sub-region.
- Panel Report on the Examination in Public (EiP) of the Draft RSS (May 2007)*
- 3.61 Key strategic recommendations made in the Panel Report include:
- Ensuring greater emphasis on the promotion of sustainable economic development, improving productivity and reducing disparities that exist between the North West and the rest of the UK;
 - The inclusion of a settlement hierarchy in the Draft RSS. This hierarchy should then be reflected in policies relating to the provision of development and priority for growth; and
 - Amendments to policies relating to Key Service Centres and Local Centres to ensure greater clarity in the role of such centres.
- 3.62 Recommendation R5.1 suggests that the Draft RSS should further explain how it will spatially assist in economic development including making provision for a supply of employment land to ensure that sustainable economic development is not constrained.
- 3.63 Table 8.1 in the draft RSS, setting out the broad locations for Regionally Significant Economic Development Sites, is recommended for deletion in its entirety. A significant re-working of associated Policy W2 is also proposed.

- 3.64 Further recommendations for employment land include that employment land requirements should be disaggregated between local planning authority areas, and ensuring the release of poor quality/surplus employment land.
- 3.65 With regard to policies CLCR1 to CLCR3 of the Draft RSS, which relate specifically to the Central Lancashire City Region, the Panel concluded that:
- “The Central Lancashire City Region should be one of the basic components of the RSS; that it consists of four main units, based on Blackpool, Preston, Blackburn and Burnley; and that these should be developed as relatively self-contained entities, where jobs and services are provided locally”.*
- 3.66 Recommendations by the Panel in relation to these policies can be summarised as:
- R13.1 – Policy CLCR1 should be modified to ensure plans and policies raise economic performance (including knowledge based development in Preston) and improve the City Region’s internal and external transport links, developing the role of Preston as a regional transport gateway;
 - R13.2 –Policy CLCR2 should be modified to include priorities for growth in each of the four key centres of the City Region; and
 - R13.4 – addition of Policy CLCR4 to the Draft RSS to emphasise the “unique ‘green’ character” of the City Region, the advantages this offers and how this character will be protected and further enhanced.
- 3.67 The Secretary of State has considered the Panel Report, together with representations made on the draft RSS, and publishing Proposed Changes in March 2008. A public consultation will then take place on these Proposed Changes until 23 May 2008.
- 3.68 The Secretary of State’s proposed changes carry forward a number of the Panel’s recommendations in total or in part. Proposed changes of particular relevance to this study relate mainly to Chapter 6 of the draft RSS on employment policies. Key proposed changes include:
- Policy W3 concerning the supply of employment land and in particular the need to ensure that:
 - The most appropriate range of sites, in terms of market attractiveness and social, environmental and economic sustainability, are safeguarded for employment use;
 - At least 30% of sites are available so that all new and existing businesses have the ability to grow successfully;
 - The amount of brownfield land used for employment is maximised;
 - Full consideration is given to the scope for mixed use development particularly within centres, and on larger sites; and
 - Appropriate provision is made in Key Service Centres and full consideration is given to the innovative use of agricultural buildings to facilitate the growth and diversification of the rural economy.

- For Lancashire as a whole, Table 6.1 identifies a total requirement for 1,349 hectares for the period 2005 – 2021, which equates to an additional allocation of land of 280 hectares above that already identified. Paragraph 6.11 identifies that the distribution of and supply within different sub-regions will require Local Authorities and other partners to work together and that the North West Regional Assembly will facilitate this approach.
 - Policy W4 confirming that:
 - Where sites are to be de-allocated (following the comprehensive review of commitments outlined in Policy W3), consideration should be given to the range of alternative uses which may be appropriate; and
 - Outside of the comprehensive review of commitments, there should be a presumption against the release of allocated employment sites for other uses unless it can be shown that:
 - (a) there is an appropriate supply of sites available for employment use in quantitative and qualitative terms and, if required;
 - (b) there are replacement sites available, of equal or better quality, or an alternative means of incorporating employment land needs have been identified (e.g. mixed use development, greater intensity of use of land or, the availability of sites in adjacent authorities).

3.69 Following consideration of responses to the consultation on the Proposed Changes, the Secretary of State is expected to publish the final Regional Spatial Strategy ('The North West Plan') in the autumn of 2008.

Partial Review of the North West Regional Plan

3.70 The North West Regional Assembly consulted on a number of key issues in the Regional Spatial Strategy Draft Project Plan and Statement of Public Participation. Consultation ran until 26 March 2008 and covered the three key issues:

 - Addressing housing demand, supply and affordability;
 - Identifying the broad locations for regionally significant waste management facilities; and
 - Identifying the broad location of renewable energy generation facilities.

3.71 The Partial Review will also 'tidy up' a number of policy areas covering: Gypsies & Travellers; Travelling Showpeople; Update of Regional Parking Standards; and Key Service Centres. Consultation on draft options will take place in June 2008.

Cities North West, North West Regional Development Agency (NWRDA) (2006)

3.72 The Cities North West document is a comprehensive study of recent performance and the future potential of cities and towns in the North West, produced by the NWRDA and the Centre for Cities.

3.73 The research states that the North West would achieve more if its City Regions have greater financial autonomy and stronger leadership, both of which would help meet the challenge of promoting the continued prosperity of the past ten years. Whilst recognising the importance of big cities, the importance of key urban concentrations is also acknowledged. The development of key urban concentrations needs to be supported by a range of public interventions to enable market forces to operate more effectively.

- 3.74 Greater transport links both within and between the City Regions along with high speed rail links to London and the South will help improve investment potential. North West cities must also tackle the major skills divide. Although Manchester and Liverpool city centres are now attracting graduates and professionals with a wide range of specialised skills, surrounding communities face continuing challenges.
- 3.75 To build upon its strengths, the partners of the Central Lancashire City Region must prioritise effectively and understand the workings of the four independent places (namely Blackburn, Blackpool, Burnley and Preston and their natural hinterlands) as functional units whose relationships link the City Regions parts.
- 3.76 In the Central Lancashire City Region, the biggest challenge is to turn the area's complex geography from an obstacle into an opportunity, meaning connectivity is crucial. Public intervention is needed to remove the negative barriers which interfere with the beneficial operation of market forces such as poorly made planning and public investment decisions and the structure of local government.
- North West Regional Economic Strategy, North West Regional Development Agency (2006)*
- 3.77 This document outlines the Economic Strategy Action Plan for the Region over the next twenty years to provide a framework for action at the regional, sub-regional and local levels. Specific actions which are required within the three years following publication of the document are also identified.
- 3.78 The vision is to create a dynamic, sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life. This will require capitalising on the strengths and key assets of Manchester, Liverpool and Preston as drivers of City Regional growth.
- 3.79 The RES has identified three major drivers to achieve this vision:
- Improving productivity and growing the market;
 - Growing the size and capability of the workforce; and
 - Creating and maintaining the conditions for sustainable growth.
- 3.80 The role of planning and land use in delivering the strategy's objectives are addressed under the final key driver. Planning needs to create a positive physical planning framework to support sustainable economic growth and ensure appropriate utilities infrastructure is delivered.
- 3.81 The use of land needs to ensure the delivery of high quality employment sites and premises. This should include:
- Delivery of designated Strategic Regional Sites as regional investment sites, knowledge nuclei or inter-modal freight terminals (Action 80);
 - Identifying and pursuing reserve sites for major investment that would not otherwise take place in manufacturing, knowledge based industry, corporate HQs and R&D (Action 81); and
 - Developing a portfolio of sub-regionally important employment sites (Action 82).
- 3.82 To secure new uses for Brownfield land there should be investment in quality business accommodation/workspace and development of new alternative uses, such as housing.

- 3.83 The Central Lancashire City Regional economy has the opportunity for growth in environmental technologies and biotechnology. The strategy considers Preston as a key location for knowledge based employment, with fast growth in creative, ICT and new media occupations.
- 3.84 Key challenges include:
- Stimulating enterprise;
 - Improve productivity for service sector business;
 - Improve intra and inter City Region connectivity;
 - Developing regionally significant , high quality locations for business; and
 - Expanding the role of higher education in the City Region.
- 3.85 The role of the private sector is seen as fundamental to the delivery of the RES. Successful implementation of the RES, therefore, needs to influence public sector expenditure and must also ensure that substantially more private sector investment is attracted to the region.

North West Development Sites Location Study

- 3.86 In November 2007, the NWDA commissioned a review of the North West Region’s employment land with a focus on the 7 Strategic Regional Sites. The purpose of the review was to identify a new generation of employment sites to justify future investment decisions and to aid future investment planning.
- 3.87 Sites and key findings of direct relevance to this study are illustrated in the table below.

Site	Role
Preston Business District	Can provide knowledge economy / high value service sector employment, located on the main line to London, located in a sustainable location, located close to a large urban area, can be delivered in the lifetime of the North West Operational Programme (“NWOP”) (2007 – 2013)
Samlesbury BAe, South Ribble	Supports a key sector important to the regional economy, can be delivered in the lifetime of NWOP, can provide knowledge driven employment
Cuerden, South Ribble	Legacy site which could, as part of the annual review process, be brought forward for development
Royal Ordnance Factory, Chorley	

Sub-Regional Policies and Guidance

Central Lancashire City Region Development Programme, Lancashire Economic Partnership (2005)

- 3.88 The Development Programme identifies actions that will assist in closing the North’s £30bn output gap. The principle means of increasing the GVA is by making a transition from lower value sectors into higher value markets, supporting specialist sectors and attracting knowledge based economy.
- 3.89 Preston has been identified in the Development Programme as the geographic, commercial and administration centre for Lancashire. It has been very dynamic in the last 15 years. Estimates indicate that Preston will

- achieve an above average economic growth rate for the region over the next 10 years. Its Travel to Work Area (TTWA extending to South Ribble and Chorley) is almost entirely self sufficient with 74% of its workforce living within the TTWA. It also has strong business links with Blackburn and Blackpool and through its aerospace sector has international affiliations.
- 3.90 Broadly, eight priority actions are identified in the Development Programme which will assist in achieving the above vision for the sub region:
- Stimulating Advanced Manufacturing Base - high value market activity;
 - Tourism- the Ribble Valley and Estuary is a key asset. There is a need to expand on tourism by revitalising some parts of the region including realising the resort casino project at Blackpool;
 - Sustainable Urban Growth - creating vibrant centres, high value employment and improving quality of housing;
 - Green City - The Ribble Estuary and East Lancashire Regional Parks are key natural assets. Revitalising existing centres and improving more sustainable transport links between settlements are key in working toward Green Cities;
 - Connecting the City Region - multi modal connectivity is required (transport, communication and other networks). It is vital that links between settlements are fast and efficient;
 - Spreading Enterprise - introducing high value businesses to attract a wide range of age groups within the workforce;
 - Increasing the Role of Higher Education - improving higher education opportunities;
 - Enhancing Skills and employability - historically, employers within the Region have invested poorly in developing skills of their workforce.
- 3.91 In fulfilling those priority actions, it is estimated that 55,000 new jobs would be generated within the sub region including 15,000 under the Preston City Vision.
- Lancashire Economic Strategy and Sub Regional Action Plan, Lancashire Economic Partnership (2006)*
- 3.92 The purpose of this Strategy is to provide a coordinated approach to development of the sub regional economy, identify sub regional programmes and projects, and provide a coherent framework to deliver the North West Regional Economic Strategy in Lancashire. The Strategy is to secure growth opportunities in existing areas as well as identify “key” assets in areas experiencing less growth to allow a more “effective and higher value contribution in the future”. The Action Plan is targeted for 2006-2009 however the Strategy extends beyond this time. The Strategy identifies Central Lancashire as a dynamic area of growth.
- 3.93 Six economic themes have been identified for the sub region including three which are of particular relevance to the area of this study:
- Preston City Vision;
 - Aerospace; and
 - Other advanced manufacturing and skills sectors.
- 3.94 It is envisaged that Lancashire will become more market competitive with greater links to technological advancements. With the exception of businesses linked with aerospace and advanced manufacturing sectors, the Strategy highlights that the sub region is lacking a competitive edge in the global knowledge economy.

- 3.95 Whilst the sub region remains the second largest within the North West contributing £18.8bn to the region, there are a good number of high profile businesses that could attract others into the sub-region. In order to achieve this, the Strategy recognises that it will need to attract knowledge-based industry through managed economic restructuring. The Strategy acknowledges that greater collaboration with existing businesses (almost exclusive to the manufacturing sector) in the sub region will need to occur to establish their reasons for poor investment into the area to date.
- 3.96 The Strategy identifies significant investment programme to facilitate the growth areas of Preston, South Ribble and Chorley. A significant regeneration program has been identified for Preston City Centre to accommodate a commercial quarter adjacent to a planned new residential and civic quarter.
- 3.97 In addition to exploring decommissioning of the nuclear sector, the creative industries have been identified as a sector of the economy that could provide a “competitive advantage”. An estimated £172m of total £700m currently comes from Preston.
- 3.98 The Strategy has identified that “bridging the GVA gap” will play a major role in securing opportunities for growth by raising GVA in the existing sectors and also by attracting increased activity in the stronger GVA sectors. The Lancashire Economic Partnership will have the coordinating and facilitating role to achieve this.
- 3.99 Four key areas have been identified for the Lancashire sub region which will assist in tackling the challenges identified above:
- Higher value activity and investment: - develop the market further and increase the number of businesses participating in higher value activity (professional and business services, financial services, computing and ICT) across the sub region;
 - Investing in people - develop and expand on a labour force in knowledge intensive employment by collaborating with investment plans of education and skills delivery agencies and encourage improved workforce training;
 - Employment generation & entrepreneurship: - lower skilled activity in the sub region assists the communities that reside there although their contribution to the economy should be increased. Current levels of entrepreneurship are low in the sub region when compared to other sub regions;
 - Investment in quality of place: - Ribble Valley is identified in the Strategy as having one of the largest rural business densities per head of population in the region and has experienced strong growth, reflecting the shift of population movement to rural areas for “quality of life” changes. Such growth requires improvements to transport infrastructure.
- 3.100 The Action Plan highlights a three year plan for the sub region and identifies projects that will be fundamental in the sub region delivering the priorities set out within the Northwest Regional Economic Strategy. The Action plan identifies 51,000 jobs that are likely to be created over the period of the Strategy, suggesting a further increase in GVA of approximately £1.7bn.
- 3.101 The Strategy concludes by highlighting that the key to making Lancashire an attractive place to live, work, visit and invest is the regeneration of the main urban centres.

Central Lancashire Region Development Programme Update, Central Lancashire City Region and Lancashire Economic Partnership (2006)

3.102 The 2006 update on the Development Programme provides a strategic focus on increasing productivity levels over the 15 year period and identifies areas where Central Government funding agencies need to further assist. The vision devised in the update for the development Programme is:

“By 2020 Central Lancashire will be a globally competitive and sustainable City Region distinguished by its quality of life.”

3.103 The update identifies opportunities and challenges for the City Region. Preston, South Ribble and Chorley offer greatest opportunities to exploit higher value business and professional services sector. Higher education sector is considered a valuable asset, as is green infrastructure. Challenges include:

- Working with firms for greater value added activity and productivity level;
- Raising level of skills within the workforce by improving graduate retention and addressing sustainable community issues (regeneration funding); and
- The transport and communication barrier – improving external linkages.

3.104 Following completion of the Development Programme in 2005, Preston has been recognised as a key driver of City regional growth alongside Liverpool and Manchester.

Central Lancashire City: Office Needs Assessment, Drivers Jonas and QERS (2006)

3.105 This Study identifies current office supply and also establishes the future office demand for Preston, Chorley and South Ribble by identifying recent economic trends and employment growth, recent investment trends and future economic growth forecasts in these areas.

3.106 The key drivers of demand of the office stock are existing and start up local businesses with limited investment from businesses outside the county area. The study identified two main types of office supply:- outdated secondary stock in urban centres (not DDA compliant) and modern out of town business parks with ample parking facilities. The assessment also reveals that combined traffic congestion and lack of available parking within Preston City Centre, has impacted on the growth potential of this area. Whilst rents in the town centres are low, large companies are reluctant to move to available outdated facilities.

3.107 It is estimated that there will be a substantial future requirement for office floor space including 200,000sq m of B1 and 15,000sq m of A2 until 2021. Market take up over the last 3 years has averaged at 18,000sq m which is slightly higher than the estimate set to 2021.

3.108 The review of recent planning permissions has identified that most new office developments are occurring in out of town locations with ample parking facilities. However, these lack good public transport links. Additionally, the study identified that 384,097sq m of potential floor space existed in April 2006 but the study also highlights that only a third of this floor space meets the strategic planning and sustainability criteria.

3.109 Four scenarios were identified under the study to establish potential supply of office space and revealed that there was an adequate office floor space supply at the sub-regional level. However, Chorley’s supply struggled to

cope with the 15 year requirement and meet the sustainability scenarios as well. This was mainly due to the peripheral locations of proposed future development.

3.110 The Study acknowledges that the development of Preston in a way which achieves sustainability targets would need to be supported by a number of factors including:

- A supply of suitable sites (available at prices that can support development costs);
- Availability of first class, modern office accommodation;
- Rents at a level that can compete with business park rentals, yet still facilitate a satisfactory return for developers and investors;
- Improved access by public transport; and
- Improved access by car and better car parking.

3.111 Appropriate roles for Chorley and Leyland are also examined, particularly within the context of Preston CBD and the Study questions whether a policy should be developed to restrict business park development in order to encourage Preston City office development.

Central Lancashire City Sub Regional Strategy – Audit and Analysis Report, Preston Chorley and South Ribble Local Authorities, GVA Grimley, (2005)

3.112 This report comprises the evidence base to the Strategy Document adopted by the Central Lancashire authorities. It illustrates future forecasts and trends in different aspects of spatial planning and identifies long and short term GVA growth potential. This document also identifies economic drivers which will determine the housing projection and future growth.

3.113 The Audit and Analysis report also identifies main transport infrastructure requirements at different levels in line with housing and employment projections.

3.114 Preston is identified at the top of the retail ladder within the sub-region with Chorley and Leyland performing second tier function (although Chorley is identified as being independent from Preston and benefits from a strong local customer base, despite its proximity to Preston City Centre).

3.115 In conclusion, the report highlights that whilst this on-going development does have economic benefits for the area, it will also generate additional demand for travel, of which a significant proportion will be by car.

Central Lancashire City Sub Regional Strategy, Preston Chorley and South Ribble Local Authorities (2006), GVA Grimley

3.116 The Strategy was commissioned jointly by Preston City Council, Chorley Borough Council and South Ribble Borough Councils. This Strategy identifies six strategic locations where future development should occur:

- Chorley – strengthen its role as a market town, strengthen retail and leisure activities to complement Preston;
- Preston City Centre – regeneration of the City Centre, principle focus for investment to create a vibrant City for living and working and investment in transport infrastructure;
- Preston East – focus on socio economic regeneration to address deprivation issues by renewing the housing market and defining local centres;

- Preston North – consolidation of future residential development to be phased so that it does not affect the City centre regeneration;
 - Leyland – focus on retaining its industry and consolidating the centre including the provision of high quality housing; and
 - Local centres – consolidation of local centres in sensitive locations that meet the needs of the communities such as Grimsargh, Cottam, Penwortham, Euxton, Coppull and Adlington.
- 3.117 The Strategy identifies five scenarios to assist in estimating the projected housing growth within the area and concludes that 85% (12,324 dwellings representing 770 dwellings per annum) of all new development will take place in areas including Chorley, Preston, Preston North and Leyland. The figures are based upon the steady level of economic growth that has occurred. However, the housing projections will also increase the need for travel, most of which will be car based. The study does not rule out that the Core Area may be able to achieve even higher growth rates but in order to achieve these, it identifies key features that would need to be met to feed this growth including availability of skills to match growth opportunities, the availability of quality employment land and the current housing supply constraints that exist.

The Central Lancashire City Local Development Framework Revised Core Strategy Issues and Options Paper, Preston Chorley and South Ribble Local Authorities (2007)

- 3.118 The three authorities of Preston, South Ribble and Chorley are working together to produce their Core Strategy. The revised Core Strategy Issues and Options second draft (which was subject to consultation until the 14 December 2007), sets out the following vision:

“Central Lancashire area of Preston, Chorley and South Ribble will be recognised as Lancashire’s economic driver where opportunities and accessibility will be maximised. It will be a centre of learning, have a varied cultural and historic landscape, and be known for its sustainable and secure communities, innovative and creative businesses, retail and leisure opportunities, and fine parks and open spaces. The area will have a range of high quality and affordable housing to meet the needs of both existing residents and of new residents required to achieve the area’s economic growth potential.”

Local Policy

Preston City

Preston Local Plan, Preston City Council (2004)

- 3.119 The Preston Local Plan was adopted in 2004 for the period 1996 to 2006. The Plan’s vision is to move towards a better balance between economic growth and diversification, whilst safeguarding the environment. Development is guided towards existing urban areas and away from outward city expansion on greenfield sites.
- 3.120 The Local Plan’s approach to development is underpinned by a number of inter-active themes:

- Urban concentration – focusing development in existing urban areas and re-using land wherever possible;
 - Mixed development patterns – achieving a greater diversity of uses within urban areas, rural villages and on new large development sites;
 - Economic growth – providing a range of opportunities for new employment and housing to accommodate the needs of the future population and workforce, replace outworn infrastructure and create opportunities for economic regeneration and diversification;
 - Restraint of the motor car – restrict use of the car for journeys to work, particularly in the city centre and make alternative means of transport more attractive;
 - Safeguarding the city centre – maintaining and improving the vitality and viability of the city centre;
 - Protecting the natural environment – by restricting development in the countryside and protecting and enhancing areas of historic/ architectural interest within the built environment;
 - Developer responsibility – the plan makes explicit the responsibilities a developer should accept and undertake.
- 3.121. Preston's employment base has evolved from being primarily manufacturing to a strong business and administrative centre. The underlying aim of the Plan is to provide opportunities for an expanding job market for all sections of the population whilst at the same time moving towards a more sustainable pattern of development.
- 3.122 It is noted that employment sites are allocated which best meet environmental considerations, are accessible, improve the environment of existing employment areas and improve or relocate employment uses in inappropriate locations. Preston had a large number of sites which were already committed for employment uses at the time of the adoption of the Plan. The majority of the allocated employment sites are on Brownfield sites within urban areas, however, there is an acknowledgement that some requirements will have to be met on greenfield sites.
- Preston Local Development Framework and Preston Local Development Scheme, Preston City Council (2007)***
- 3.123 Policies in the adopted Preston Local Plan gradually replaced by the Local Development Framework as relevant documents are prepared. The Local Development Scheme (LDS) sets out a timetable of Local Development Documents (LDDs) to be produced over the next three years of the Local Development Framework programme. Early Core Strategy work is being pursued jointly also with Chorley and South Ribble Councils.
- Preston Economic Regeneration Strategy and Action Plan, GVA Grimley and Preston City Council (2005)***
- 3.124 Preston is identified as having a spread of sectors and an industrial mix. Preston is expected to post well above regional average employment growth over the next 10 years. However, there are significant deprivation issues in some areas. The Strategy and Action Plan establishes a programme of projects over the 15 years to 2021. The purpose of the Strategy is to provide an overarching vision to guide the transformation of the city to a competitive European city.
- 3.125 There are two strands to the Strategy. The first strand is 'City Region Projects' – which involves visionary projects to consolidate Preston's success to date and drive it forward on a competitive footing. The second

strand is 'Linking Opportunity and Need' which involves projects to ensure that full economic delivery potential is realised for the benefit of Preston's population. Key themes are as follows:

- New Economy – raising the profile of Preston as a city with a big reputation for business. The delivery of a city centre commercial quarter is key to this;
- Centre for Retailing and Leisure – delivery of £500 million investment at Tithebarn to deliver 76,000 sqm of comparison, convenience and commercial leisure;
- Tourism and Heritage – capitalising upon the economic opportunities arising from some of the city's finest tourism and heritage assets;
- Gateways – improved arrival points to reflect the quality of the city is striving to create and improvements to the transport infrastructure;
- Linking opportunity with need – a multi-agency approach to enable the indigenous working population and those currently excluded from the labour market.

Preston Community Strategy, Preston Community Partnership (2007 – 2012)

3.126 This second Community Strategy builds on the original strategy produced in 2003. It has measured the effects of the action delivered in the first Community Strategy and re-assessed the needs of different parts of the community. In producing the Sustainable Community Strategy. We have also taken into account the views of Preston's residents, though the PSP Quality of Life Survey and new policies from Government on issues such as:

- Achieving wellbeing/ quality of life
- Meeting the needs of an increasing number of older people
- Land use planning
- Climate change.

Chorley Borough

Chorley Borough Local Plan Review, Chorley Borough Council (2003)

3.127 The Chorley Borough Local Plan (Review) was adopted in 2003. The guiding principle is one of sustainable development. The vision for the Borough is 'to make Chorley a better place to live, work and visit'.

3.128 The focus of development is to be achieved though a number of objectives:

- Directing new development to central urbanised areas of the Borough;
- Guiding development to sustainable and accessible locations, minimising new developments on greenfield sites and open spaces;
- Encouraging mixed use schemes to reduce the need to travel;
- Maximising the use of land;
- Supporting the regeneration of run down areas; and
- Improving the vitality and viability of Chorley Town Centre.

3.129 The aim of the Plan in terms of employment is to promote and facilitate growth in the economy by providing opportunities for investment and development in the Borough without adversely affecting the environment or local communities. Objectives include the provision of an adequate supply of land for a range of employment purposes for development though the

plan period, ensuring where possible major employment sites are located in transport choice locations, and encouraging the reuse of vacant and underused land.

Emerging Local Development Framework and Local Development Scheme (LDS), Chorley Borough Council (2007)

3.130 The Council have started work on the Local Development Framework (LDF), which will replace the Local Plan. The Preferred Options Development Plan Document (DPD) will not be published until November 2009. Early Core Strategy work for the LDF is being pursued jointly with Preston and South Ribble. A Submitted Sustainable Resource Development Plan Document was considered at Examination in May 2008 with the Inspector's Report expected July 2008. The production of a Town Centre Action Area and Retail and Leisure Policies Development Plan Document has been withdrawn. The LDS sets out the timetable for the production making up the Local Development Documents in the Local Development Framework.

Chorley Economic Regeneration Strategy, Chorley Borough Council (2006)

3.131 The Economic Regeneration Strategy provides a summary of the key issues and options to which the Borough must respond. In many respects Chorley's economy is doing well. The Borough can boast an economic structure aligned with the Core Central Lancashire sub-regional economy, a high business density, GVA per capita above County and Regional averages, and high labour force activity rates. However, the borough faces a series of economic challenges which include commuting patterns (mass out migration); low take-up of employment land, accessibility issues, and economic dependence on vulnerable sectors. The Corporate Vision for Chorley is that:

“ by 2025 Chorley will be recognised as the most sought after place to live and work in the North West offering an excellent quality of life of all its residents, and will be at the heart of regional developments whilst retaining its unique character.”

3.132 The Strategy incorporates measures to address:

- Improving skills and addressing worklessness;
- A thriving town centre;
- Improving transport infrastructure and accessibility;
- Supporting and developing enterprise;
- Providing a portfolio of sites and premises; and
- Marketing Chorley to the world.

3.133 Despite Chorley's strategic location at the heart of Lancashire it has a low take up rate averaging just 0.9 hectares per annum over since 2001. Vacancy levels for industrial and commercial premises are over 7.5% above those in competing centres such as Preston.

3.134 The Regional Investment Site at Euxton, is located between the M6 and M61 motorways to the north of Chorley town. This site is regarded as key to inward investment and future employment in the borough and sub-region over the next decade. Collectively the area provides a critical mass of opportunity and there is scope to conceive the area running from M61

- Junction 8 though to Matrix Park and the M6 as a 'bridge of commercial opportunity'.
- 3.135 Creating a portfolio of workspaces for small and expanding business is identified as a key enabling action. Chorley has a high level of business start-ups and the challenge going forward is both to maintain and improve levels of start-ups and shift activity towards higher value-added operations. The Council will work to maintain a supply of suitable industrial and office premises and work with funding partners to overcome barriers to higher rates of business formation.
- Draft Chorley Economic Regeneration Strategy Action Plan, The Chorley Partnership (2007 – 2010)*
- 3.136 The Draft Economic Regeneration Strategy Action Plan sets key actions and measures for success for a number of themes. One of the themes is providing a portfolio of sites and premises. The target is that each year there will be a 10% increase in the value of private sector investment generated. The baseline position in 2006 for business floorspace is 41,949sqm and the target is that there will be a 10% increase year on year from that base.
- Chorley Profile a State of the Borough Report, Chorley Borough Council (2007)*
- 3.137 The State of the Borough of Report forms part of the evidence base of the Local Development Framework and includes information about a wide range of environmental, social and economic characteristics.
- 3.138 Employment growth in Central Lancashire was very strong over the period 1998 – 2005, growing at a rate of almost double the national average. Over this period Chorley experienced the highest rate of employee growth of any district in Lancashire, with the proportion of jobs growing by 23.8%. During this period the number of jobs in business services and the education sector grew substantially, while there was a sharp drop in jobs in the mining, energy and water sector and the manufacturing sector. There was a 43% increase in business start ups in this period. Almost half of residents in employment in Chorley work within the Borough itself and just over half travel outside the Borough to work. The most popular places of work outside the Borough are South Ribble and Preston.
- 3.139 The take-up of sites for new employment development in the Borough has been low in the past (22 ha from 1991 – 2005). However, in 2005/2006 16.2 ha were developed for employment use (10 ha on one site on the Regional Investment Site close to Buckshaw Village). The Borough has some industrial floor space in a poor state of repair; meaning firms ready to relocate may have difficulty finding suitable premises. Similarly there is only limited provision of small units for start-up businesses.
- 3.140 The former Royal Ordnance site at Euxton is a major Brownfield redevelopment opportunity (over 400 hectares), which straddles the Chorley Borough and South Ribble District. Employment, housing and community uses are proposed for the site (Buckshaw Village). Part of the site is recognised as of regional significance. Remediation of the site commenced in 1999.

Chorley Town Centre Strategy, Chorley Borough Council (2006)

3.141 The Town Centre Strategy is for the period 2006 – 2010 and its vision is:

“To create a contemporary market town where people can enjoy a wealth of stores and attractions to rival neighbouring cities and shopping centres in the North West. A place where people can meet and enjoy their leisure time, where business can thrive and where people can soak up a traditional Chorley welcome”

3.142 Objectives for the period include broadening the appeal of the town centre by increased shops and leisure attractions, and improving accessibility, safety and the appearance of the town centre.

Chorley Community Strategy – A Sustainable Community Strategy for Chorley 2007 – 2025

3.143 The Strategy sets out five priority areas:

- Ensuring that Chorley is the pulse of a thriving central Lancashire economy
- Improving life chances for all
- Developing local solutions to global climate change
- Developing the character and feel of Chorley as a good place to live, work and play
- Building Stronger Communities with improved access to and satisfaction with public services

3.144 The Vision is that:

By 2025, Chorley will be leading the way on safe, clean and sustainable neighbourhoods where everyone has equal opportunity to access public services, good jobs and decent homes. Our contemporary market town of Chorley and the surrounding villages will continue to strive to be the place other towns aspire to.

South Ribble Borough Council

South Ribble Local Plan (2000)

3.145 The South Ribble Local Plan was adopted in 2000. The Plan’s vision is

‘to develop the concept of sustainable development with an emphasis on improving quality of life in the Borough’.

3.146 The focus of development is to be achieved through a number of goals:

- Guiding development towards the main sustainable, accessible urban areas as well as the built up areas of the smaller settlements and villages, maximising the use of existing infrastructure including public transport, to reduce the number of car journeys to work;
- Promoting and encouraging the reuse of vacant land and buildings, to reduce the need to release greenfield sites;
- Maximising the potential for economic growth through the support for restructuring the local economy by providing an adequate supply of industrial and business land, and providing more employment opportunities;
- Promoting the rural economy of the Borough; and

- Encouraging mixed use schemes as they help to create vitality and viability and reduce the need to travel, they can also help to regenerate an area.
- 3.147 To meet the aspirations of the Local Plan, guidance is given in relation to expanding and redeveloping existing industrial and employment areas and creating employment opportunities in residential areas. Development is curtailed in greenfield locations but is supported by the creation of jobs and the diversification of the rural economy of the Borough such as by the creation of small scale employment opportunities. In this context land is protected adjacent to small villages if it meets local needs, including employment and is appropriate in this location.

Emerging Local Development Framework and Local Development Scheme, South Ribble Borough Council (2007)

- 3.148 The Local Plan remains the definitive statement of the Council's planning policies until the Local Development Framework is at a more advanced stage. The only DPD which has currently been adopted is the Statement of Community Involvement. Early Core Strategy work is being pursued jointly with Preston and Chorley authorities.
- 3.149 The Local Development Scheme (revised) was published as a Submission Version in March 2007. The LDS represents a project plan for the period 1 January 2007 to 31 December 2012 setting out milestones for providing the LDF.

A Sustainable Community Strategy for South Ribble 2006-2009, South Ribble Partnership

- 3.150 The partnership has a vision for South Ribble of:
- A place to proud to belong to and which goes from strength to strength;
 - A place with a strong identity, making a major contribution to the wider sub region; and
 - A place with diverse, dynamic communities which work together for a better future.
- 3.151 In order to achieve this vision the following areas of action are identified:
- Safer communities;
 - Healthy communities with decent affordable housing and ample cultural and leisure opportunities for all;
 - A clean, green and sustainable environment;
 - Sustainable integrated transport for all;
 - Thriving and prosperous borough with education, learning and employment opportunities for all; and
 - Supporting people with differing needs.

South Ribble Economic Action Plan, South Ribble Economic Partnership (2006 – 2007)

- 3.152 The Economic Action Plan (EAP) was produced to set out the context and key issues particularly relating to economic development, but also associated social and environmental issues in South Ribble. South Ribble is one of four local authorities selected to pilot the production of an EAP. The EAP vision, agreed by the partners in 2004 includes the aspiration that

By 2025, South Ribble will be recognised as a great place to live, work, visit and play and, as part of the central Lancashire city region, will be in a position to attract investment particularly exploiting its proximity to Preston and the Manchester and Merseyside city regions ... Implementation of the EAP is intended to ensure that by 2025 South Ribble is playing a key role in the development and success of the Central Lancashire City Region.

- 3.153 Key objectives for the plan include the reduction of out-commuting, the identification of the needs of local business, ensuring a continuous supply of commercial premises for existing local businesses and for inward investment, raising skill levels, and the attraction and retention of investment in the Borough.

Draft South Ribble Profile, South Ribble Borough Council (2007)

- 3.154 The profile acts as a State of the Borough Report and is intended to identify issues to be dealt with in the LDF. The profile sets out information on population demographics, housing, health, crime, retail, transport, the environment, education and leisure and tourism. In terms of employment the borough has seen a decline in the manufacturing industry and an increase in the service industry which now employs nearly 70% of the workplace population. Just over half of the people who work in the Borough live in the Borough (55%) and just under half live outside the Borough (45%).

Leyland Town Centre Masterplan

- 3.155 The Council in collaboration with independent consultants produced a Masterplan for Leyland to help establish a role for the town, encourage economic growth and create a safer, more attractive environment for shoppers, visitors and those that live and work in the town centre.
- 3.156 The Masterplan was approved by the Cabinet in March 2007 and aims to promote Leyland as a vibrant town centre at the heart of the Central Lancashire City region, focussing new development on upgrading existing sites and derelict land to provide for a range of development opportunities, including employment.

Policy Summary

- 3.157 This section summarise the main aims, objectives and priorities of planning and economic policy prevailing at the national, regional, sub-regional and local levels, drawing together information set out in the preceding paragraphs.

National and Regional Level

- 3.158 At the national and regional level, a number of key economic and planning strategy objectives can be identified and summarised as follows:

Strategic Economic Development Objectives

- Attraction of businesses which provide for higher value activities and investment, particularly those within key economic sectors such as advanced manufacturing / engineering (e.g. aerospace), environmental technologies, biomedical, tourism and conference sectors and creative industries;
- Promotion of clustering of existing and new activities and development of knowledge-based industries, focussed around research establishments,

higher education institutions, major hospitals and technology-based businesses;

- Identify Locations for Regionally Significant Economic Development that are capable of delivery, are highly accessible, well related in relation to high levels of worklessness, areas in need of regeneration and neighbouring uses and, meet the following more specific roles and requirements:

Role of Regionally Significant Site	Locational Requirement
Office development	In and adjacent to city and town centres
Knowledge-based services	Cluster close to universities, major hospitals or other research establishments
Knowledge-based manufacturing	Well connected to facilities by transport and ICT links
Logistics and high-volume manufacturing	Well connected to primary freight networks

- Identification of sub-regionally important employment sites (to accommodate key economic sectors) and local opportunities to secure a balanced portfolio of sites; and
- Develop and diversify the economy in rural parts of the Region.

Strategic Planning Objectives

- Maximise the use of Brownfield land and promote economy in use of land, including through the restoration of derelict and neglected land and buildings. Promote the modernisation and diversification of older manufacturing industry and their premises;
- Adopt a sequential approach to meeting development needs to reduce the need to travel, particularly for uses which generate travel demand. For offices, this includes directing development within or adjoining main city, town or district centres and near to public transport interchanges in urban areas;
- Plan for warehousing and distribution uses to avoid the unnecessary movement of goods by road, also taking into account of the need for proximity of labour supply, access by road, rail and ports / airports and for sites to be of a sufficient scale to allow for flexible development and expansion; and
- Ability to accommodate mixed use development.

3.159 Draft PPS4 was published for public consultation in December 2007 as a step to updating national planning policy on employment and economic development. This draft document proposes a number of important policy changes relating to planning for employment development, including:

- A flexible approach to the supply and use of land through planning policies to ensure increased competition and enterprise, enhanced skills and innovation, increased job opportunities and greater investment;
- Avoiding the designation of sites for single or restricted use classes wherever possible; and
- Local authorities should take a constructive approach to changes of use where there is no likelihood for demonstrable harm.

Sub-Regional and Local Level

3.160 The Central Lancashire City Region’s ‘Core Area’ of Preston, South Ribble and Chorley is seen as a focus for economic growth. The following table summaries the main spatial priorities and objectives at the sub regional and local level:

Local Authority Area	Summary of Priority
Chorley	<ul style="list-style-type: none"> • Identification of Chorley as a Key Service Centre to support surrounding villages and rural areas • Aim to strengthen its role as a market town , strengthen retail and leisure activities to complement Preston • Address issues: of low take up rates of employment land; relatively high vacancy levels; scale of out-commuting; and economic dependence on vulnerable sectors
Preston	<ul style="list-style-type: none"> • Identification of Preston as a Regional City and main location to maximise growth opportunities as a key economic driver for the City Region • Regeneration of the City Centre • Inner East Preston – focus on socio economic regeneration to address deprivation • Address areas of acute deprivation and deliver a city centre commercial quarter / the Tithebarn scheme to enhance the City's reputation for business
South Ribble	<ul style="list-style-type: none"> • Identification of Leyland as a Key Service Centre to support surrounding villages and rural areas • Aim to retain industry in Leyland and consolidate the centre • Address issues of low take up rates of employment land and scale of out-commuting
General	<ul style="list-style-type: none"> • Consolidation of local centres in sensitive locations that meet the needs of the communities such as Grimsargh, Cottam, Penwortham, Euxton, Coppull and Adlington.

3.161 On a City Region level, adopted RSS identifies the following two sites as Regionally Significant Development Locations:

- Royal Ordnance, Chorley; and
- Cuerden Regional Business Park, South Ribble.

3.162 Emerging draft RSS sets out the following broad Locations for Regionally Significant Economic Development in the Central Lancashire City Region:

Site	Broad Location
Regional Investment Site	North West Chorley
	North of Leyland / Bamber Bridge*
Knowledge Nuclei Site	Central Preston

* Identified as a 'reserve site' for accommodating inward investment which would otherwise be lost to the Region

3.163 (Note - The recent Panel Report into the draft RSS proposes the deletion of the above table and the inclusion of a revised associated Policy which is broadly reflected in the strategic economic development objectives summarised above).

4. Employment Land and Premises – Quantitative Assessment of Supply

Introduction

- 4.1 The property profile, in terms of amount and broad distribution across the Local Authority areas, has been assessed through a quantitative analysis of employment floor space by B1, B2 and B8 uses class and also by employment sectors (office, manufacturing and warehouse / distribution).
- 4.2 To provide an overall quantitative picture of supply, the following two main aspects have been considered:
 - The quantum and distribution of the existing stock of employment floorspace, distinguishing between vacant and occupied space; and
 - The quantum and distribution of employment land supply and associated potential new floorspace.
- 4.3 Further details on the main characteristics of quantitative supply are set out below. Commentary on quantitative supply by each sub-area is included at the end of this chapter.

Existing Stock of Employment Premises

Total Existing Employment Floorspace

- 4.4 The most reliable figures for existing floorspace provision at the sub-district level are provided by the Office for National Statistics (ONS). This information assists in forming locally derived floorspace ratios for the forecast model to give a more accurate picture of local accommodation sizes. The results also help to create an overview of the scale and location of existing employment accommodation for market trends analysis.
- 4.5 The data identifies the total number and floorspace of hereditaments by sector, notably office, factory (manufacturing) and warehouse & distribution. Data can be analysed by sub-areas within each Local Authority area, albeit that ‘best fit’ ONS output areas need to be applied.
- 4.6 Hereditaments are defined as ‘a piece of real, inheritable or taxable property on which rates may be charged and which is defined in law’. In the majority of cases, a hereditament corresponds to an extent of contiguous or adjacent space appropriate for a single business occupier. Most hereditaments relate to groups of buildings, single buildings or premises within buildings. Large office or mixed-use commercial or industrial buildings will, if shared between several tenants or owners, consist of several hereditaments. These hereditaments may occupy some floors, part of a floor or space in, adjacent to, or associated with the building. For example a flower stall or newspaper kiosk in an office building can constitute a separate hereditament. Conversely a single large hereditament may comprise many distinct buildings, for example a large factory on a single site.
- 4.7 Thus, while the data reflects precisely the number of hereditaments at a certain time, this number may not be the same as the number of buildings or institutions that might be arrived at by another observer collecting information on the same building stock but for a different purpose. By and

large the difference will be small, but for certain types of premises it can be more considerable.

- 4.8 **Table 4.1** shows the approximate breakdown of all existing employment hereditaments and floorspace figures by sector and at sub-area level (2006 data).

Table 4.1 Breakdown of ONS Data by Sector and Sub-Area in Central Lancashire (Hereditaments and Floorspace)

Local Authority Area	Sub Area	Office A2 and B1(a)	Manufacturing B1(b), B1(c) and B2	Warehouse & Distribution (B8)
Chorley Borough Council	Central	369 71,000 sqm	224 201,000 sqm	208 168,000 sqm
	East	37 8,000 sqm	128 94,000 sqm	51 32,000 sqm
	West	35 5,000 sqm	74 18,000 sqm	58 39,000 sqm
		441 84,000 sq m	426 313,000 sqm	317 239,000 sqm
Preston City Council	City Centre	475 2220,000 sqm	58 21,000 sqm	72 43,000 sqm
	Inner Area	183 66,000 sqm	356 232,000 sqm	289 249,000 sqm
	Western Suburbs	118 48,000 sqm	125 58,000 sqm	90 66,000 sqm
	Eastern Suburbs	116 38,000 sqm	78 96,000 sqm	141 143,000 sqm
	Rural	21 5,000 sqm	62 26,000 sqm	32 9,000 sqm
		913 377,000 sqm	679 433,000 sqm	624 510,000 sqm
South Ribble Borough Council	Leyland and Farington	177 46,000 sqm	128 276,000 sqm	130 135,000 sqm
	Lostock Hall, Bamber Bridge and Penwortham	70 18,000 sqm	178 241,000 sqm	193 250,000 sqm
	Eastern Parishes	9 2,000 sqm	26 41,000 sqm	34 23,000 sqm
	Western Parishes	36 28,000 sqm	32 11,000 sqm	38 20,000 sqm
		292 94,000 sqm	364 569,000 sqm	395 428,000 sqm
Total Central Lancashire Area		1,646 555,000 sqm	1,469 1,315,000 sqm	1,336 1,177,000 sqm

Vacant Premises

- 4.9 Sub-district level ONS floorspace data does not distinguish between vacant and occupied space, rather an amalgamated figure for total floorspace is identified.
- 4.10 Set out in **Tables 4.2** and **4.3** below is an overview of vacant premises by sub-area, providing a snap-shot of vacancies as at the beginning of October 2007. This overview has been compiled based on details of vacant premises included on the 'Locate in Lancashire' website reviewed by the Local Authorities and review of Agent's information.

Table 4.2: Vacant Office Premises (October 2007)

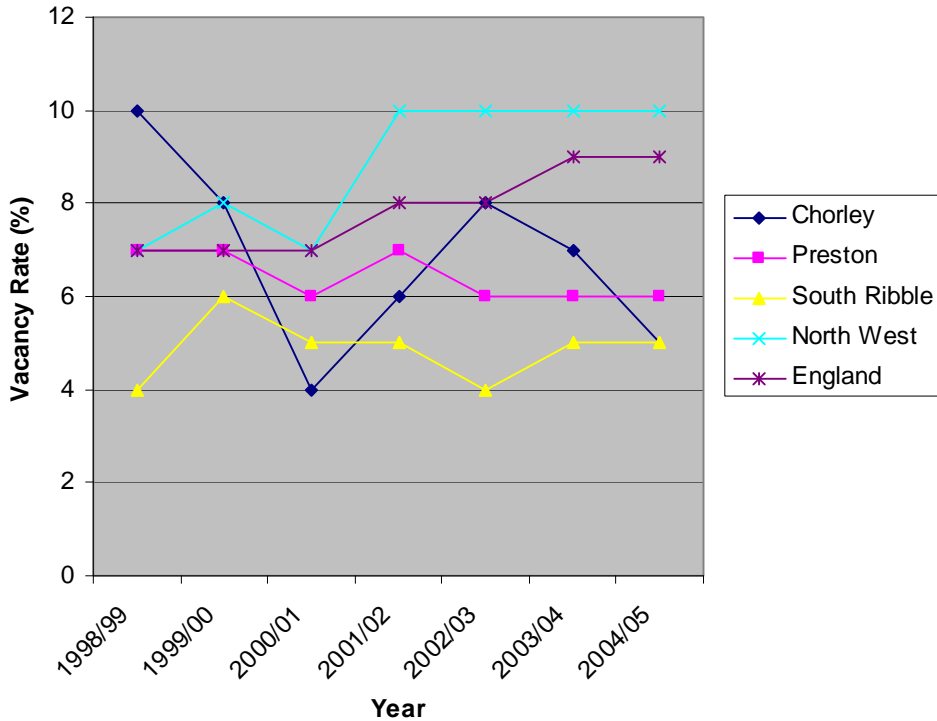
Sub Area	Size Bands in m ² (numbers of vacant properties shown in brackets)						Total
	0 - 100	101 - 500	501 - 1000	1001 - 2000	2001 - 5000	5001+	
Central Area	1057 (23)	2598 (10)	641 (1)	-	-	-	4,296 (34)
Eastern Area	-	-	-	-	-	-	0 (0)
Western Area	93 (1)	134 (1)	596 (1)	-	-	-	823 (3)
Chorley Total	1,150 (24)	2,732 (11)	1,237 (2)	0 (0)	0 (0)	0 (0)	5,119 (37)
Preston City Centre	1,185 (33)	5,043 (20)	3,096 (6)	4,583 (3)	4,052 (1)	-	17,959 (63)
Inner Area	387 (8)	2,265 (9)	2,363 (4)	1,858 (1)	2,044 (1)	-	8,917 (23)
Western Suburbs	152 (2)	2,239 (7)	724 (1)	4,567 (3)	-	-	7,682 (13)
Eastern Suburbs	-	4,323 (15)	2,805 (4)	4,912 (3)	10,685 (4)	-	22,725 (26)
Rural	-	-	-	-	-	-	0 (0)
Preston Total	1,724 (43)	13,870 (51)	8,988 (15)	15,920 (10)	16,781 (6)	0 (0)	57,283 (125)
Leyland & Farington	503 (17)	768 (2)	-	1,476 (1)	2,787 (1)	-	5,534 (21)
Lostock, Bamber Bridge & Penwortham	483 (7)	2,154 (15)	1,606 (2)	-	2,101 (1)	-	6,344 (25)
Eastern Parishes	-	-	-	-	-	-	0 (0)
Western Parishes	-	-	-	-	-	-	0 (0)
South Ribble Total	986 (24)	2,922 (17)	1,606 (2)	1,476 (1)	4,888 (2)	0 (0)	11,878 (46)
Overall Total	3,860 (91)	19,524 (79)	11,831 (19)	17,396 (10)	21,669 (8)	0 (0)	74,280 (191)

Table 4.3: Vacant Industrial & Warehousing Premises (October 2007)

Sub Area	Size Bands in m ² (numbers of vacant properties shown in brackets)						Total
	0 - 100	101 - 500	501 - 1000	1001 - 2000	2001 - 5000	5001+	
Central Area	824 (11)	4,329 (16)	7,004 (10)	2,785 (2)	5,649 (2)	49,879 (3)	70,533 (44)
Eastern Area	-	-	-	-	-	-	0 (0)
Western Area	184 (3)	761 (3)	1,496 (2)	-	-	-	2,441 (8)
Chorley Total	1,008 (14)	5,090 (19)	8,500 (12)	2,785 (2)	5,649 (2)	49,879 (3)	72,973 (52)
Preston City Centre	93 (1)	-	1,816 (2)	1,811 (1)	5,056 (2)	-	8,776 (6)
Inner Area	19 (1)	2,842 (10)	1,301 (2)	1,283 (1)	2,023 (1)	-	7,468 (15)
Western Area	842 (16)	3,679 (18)	1,656 (2)	-	-	-	6,177 (36)
Eastern Area	117 (3)	1,272 (5)	-	3,670 (3)	4,484 (2)	-	9,543 (13)
Rural	-	-	-	-	-	-	0 (0)
Preston Total	1,071 (21)	7,793 (33)	4,773 (6)	6,764 (5)	11,563 (5)	0 (0)	31,964 (70)
Leyland & Farington	105 (9)	7,441 (12)	2,157 (3)	9,030 (6)	2,290 (1)	22,692 (3)	43,733 (34)
Lostock, Bamber Bridge & Penwortham	190 (7)	1,524 (4)	1,956 (3)	1,139 (1)	10,406 (4)	9,006 (1)	24,230 (20)
Eastern Area	-	-	-	1,604 (1)	-	-	1,604 (1)
Western Area	-	251 (1)	-	-	-	-	251 (1)
South Ribble Total	295 (16)	9,216 (17)	4,113 (6)	10,169 (8)	12,696 (5)	31,698 (4)	69,567 (55)
Overall Total	2,374 (51)	22,099 (69)	17,386 (24)	19,718 (15)	29,908 (12)	81,577 (7)	174,504 (178)

- 4.11 The Graph overleaf illustrates the vacancy rate of employment land within Chorley, Preston and South Ribble between 1998/99 and 2004/05. The vacancy rate is compared against the regional and national average.
- 4.12 The three local authority areas have seen vacancies declining or remaining relatively constant throughout this period (although Chorley has experienced fairly dramatic fluctuations). Conversely, vacancy rates for the North West region and England as a whole have increased over time.

Figure 4.1: Change in Vacancy over Period 1998/99 to 2004/05



Source: ONS Data

Employment Land Supply

- 4.13 The assessment of existing employment land supply has focussed mainly on the following:
- **Employment Allocations** – Sites without planning permission which are allocated for B1, B2 and B8 uses in the adopted Preston City Local Plan 2004, Chorley Local Plan 2003 and South Ribble Local Plan 2000. Also included are other relevant allocations with potential to accommodate new employment development (i.e. appropriate Urban Renewal Areas) and also 'owner specific' sites.
 - **Employment Commitments** – Committed sites (i.e. those under construction or with extant planning permission) for B1, B2 or B8 uses and existing employment uses with extant permission for other forms of development at the time of survey.
- 4.14 Quantitative land supply information obtained from the Councils has been interrogated and expanded upon to provide a more detailed assessment of land supply and potential new employment floorspace. This approach provides a more in depth analysis than just looking at site areas in isolation for example.
- 4.15 This has involved the identification of floorspace information by planning use class / employment sector. The general approach applied to define (potential) floorspace capacities is as follows:

Allocations

- Measuring the site areas of available Local Plan employment allocations and commitments on a digital mapping system.
- Application of the following plot ratios of gross floorspace to site area based on information contained in Appendix D of the Employment Land Reviews Good Practice Note of December 2004.

Offices (0.4)

Industrial (0.4)

Warehouse (0.5)

- Local Plan information, discussions with the local planning authority, information from agents, past completions and qualitative assessment information has been used to define a quantitative apportionment of the employment uses for particular sites. Employment uses considered include:

B1 office

B1 light industry

B2 manufacturing; and

B8 warehousing and distribution

- Separate out 'owner specific' sites from those which are available for development on the open market. In accordance with good practice, allocations which are only available for a specific occupier are excluded from available employment land totals until sites gain planning permission.

Commitments and Completions

- Interrogation of annual employment land monitoring information and other additional data provided by Preston City Council, Chorley Borough Council and South Ribble Borough Council to extract site area, floorspace and use class information recorded for completions and extant commitments.
- Where floorspace information is not recorded, a similar approach to that used for allocations has been used (note – where other information is not available and for sites which have not been qualitatively assessed as part of this study, we normally apply an equal split between permitted uses as a proxy guide).

4.16 It should be recognised that employment monitoring information is not absolute. For example an employment allocation identified for B1, B2 and B8 uses may come forward for just one of these uses. Similarly, development may come forward at a higher or lower density than assumed as part of this review.

4.17 In spite of acknowledged limitations, it is considered that the overall approach to the assessment does provide a good guide to employment land supply. This includes the identification of likely available land and associated floorspace capacity for different employment uses/sectors to be derived from existing local plan allocations and employment commitments. Future more refined monitoring of land supply will further enhance quantitative analysis.

4.18 **Table 4.4** below illustrates the planning use classes attributed to the ONS Classifications. The assignment of use classes as shown in the table is considered to be reasonably accurate by the ODPM and ONS.

Table 4.4: Office of National Statistics Classes v Planning Use Classes

ONS Classification	Planning Use Class
Office	A2 and B1(a)
Manufacturing	B1(b), B1(c) and B2
Warehousing / Distribution	B8

- 4.19 In assessing potential floorspace, it is important to distinguish between B1 office and B1 light industry. Understanding this breakdown ensures a more robust approach to the assessment. Sub-dividing B1 uses enables a better comparison with information on existing stock and premises extracted from the administrative databases used by the ONS and is also consistent with forecasting and market classifications used elsewhere in this report.

Employment Allocations and Commitments

- 4.20 **Tables 4.5 to 4.10** below provide a quantitative assessment by sub-area, local authority and Central Lancashire area of the size and (an estimate of) the potential floorspace capacity of:
- Employment and other relevant allocations without planning permission; and
 - Employment commitments (within and outside of Local Plan allocations).
- 4.21 As well as considering additions to employment land supply arising from new development (employment gains), the study also considers employment losses (i.e. reductions in employment floorspace arising from planning permissions for other uses) to provide a picture of net supply.

Table 4.5: Local Plan Employment Allocations (without Planning Permission)

Site (ELR Site Reference Nos)	Available Area (hectares)	Capacity				
		Floorspace Estimate m ² (site area in hectares)				
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D	Total B Class
Botany/ Great Knowley Site (1)	14.1	14,100 (3.525)	14,100 (3.525)	28,200 (7.05)	0 (0)	56,400 (14.1)
Railway Road, Adlington (47)	2	8,000 (2)	0 (0)	0 (0)	0 (0)	8,000 (2)
Chorley North Industrial Estate (3)	0.4	280 (0.07)	280 (0.07)	520 (0.13)	650 (0.13)	1,730 (0.4)
Cowling Farm (13)	8.5	5,680 (1.42)	5,680 (1.42)	11,320 (2.83)	14,150 (2.83)	36,830 (8.5)
Red Bank, Carr Lane (Duxbury Business Park) (17)	2.5	1,680 (0.42)	1,680 (0.42)	3,320 (0.83)	4,150 (0.83)	10,830 (2.5)
Southport Road (19)	2.1	8,400 (2.1)	0 (0)	0 (0)	0 (0)	8,400 (2.1)
Ackhurst Park Employment Area/ Common Bank Employment Area (5)	1.1	2,200 (0.55)	880 (0.22)	880 (0.22)	500 (0.11)	4,460 (1.1)
Brook Mill, Adlington (53)	0.4	280 (0.07)	280 (0.07)	520 (0.13)	650 (0.13)	1,730 (0.4)
Group 1 Buckshaw (37)	5.4	12,960 (3.24)	4,320 (1.08) (1.615)	4,320 (1.08)	0 (0)	21,600 (5.4)
Southern Commercial/ Buckshaw Village (38)	17.95	14,360 (3.59)	0 (0)	28,720 (7.18)	35,900 (7.18)	78,980 (17.95)

Site (ELR Site Reference Nos)	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Stump Lane (16)	0.16	600 (0.16)	0 (0)	0 (0)	0 (0)	600 (0.16)	
Crosse Hall Street (24) (also Including Weir Mill which is not allocated)	0.21	140 (0.035)	140 (0.035)	280 (0.07)	350 (0.07)	910 (0.21)	
Chorley Central	54.82	68,680 (17.18)	27,360 (6.84)	78,080 (19.52)	56,350 (11.28)	230,470 (54.82)	
-	0	0	0	0	0	0	
Chorley East	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Rear of New Street Mawdesley (46)	0.6	600 (0.15)	1,800 (0.45)	0 (0)	0 (0)	2,400 (0.6)	
Chorley West	0.6	600 (0.15)	1,800 (0.45)	0 (0)	0 (0)	2,400 (0.6)	
Chorley Total	55.42	69,280 (17.33)	29,160 (7.29)	78,080 (19.52)	56,350 (11.28)	232,870 (55.42)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston City Centre	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Ringway / Falkland Street	2.10	8,200 (2.10)	0 (0)	0 (0)	0 (0)	8,200 (2.10)	
Preston Inner Area	2.10	8,200 (2.10)	0 (0)	0 (0)	0 (0)	8,200 (2.10)	
Preston Riversway (Site D2) (20)	0.44	0 (0)	600 (0.15)	600 (0.15)	660 (0.14)	1,860 (0.44)	
Deepdale Street/ Fletcher Road (44)	1.24	0 (0)	2,480 (0.62)	2,480 (0.62)	0 (0)	4,960 (1.24)	
Preston Western Suburbs	1.68	0 (0)	3,080 (0.77)	3,080 (0.77)	660 (0.14)	6,820 (1.68)	
Preston East Employment Area (7)	16.89	6,756** (1.689)	20,268** (5.067)	20,268** (5.067)	25,335** (5.067)	72,627** (16.89)	
Red Scar (excluding Sites F & H) (17)	4.53	1,812 (0.453)	5,436 (1.359)	5,436 (1.359)	6,795 (1.359)	19,479 (4.53)	
Junction 31a West Loop (8)	4.32	1,728 (0.432)	15,552 (3.888)	0 (0)	0 (0)	17,280 (4.32)	
Millennium Park (1)	3.5	1,400 (0.35)	4,200 (1.05)	4,200 (1.05)	5,250 (1.05)	15,050 (3.5)	
Preston Eastern Suburbs	29.24	11,696 (2.924)	45,456 (11.364)	29,904 (7.476)	37,380 (7.476)	124,436 (29.24)	
Land North of Eastway (formerly Broughton Business Park) (15)	24.68	24,680 (6.17)	29,616 (7.404)	14,808 (3.702)	37,020 (7.404)	106,124 (24.68)	

Site (ELR Site Reference Nos)	Available Area (hectares)	Capacity				
		Floorspace Estimate m ² (site area in hectares)				
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D	Total B Class
Preston Rural	24.68	24,680 (6.17)	29,616 (7.404)	14,808 (3.702)	37,020 (7.404)	106,124 (24.68)
Preston Total	57.7	44,576 (11.194)	78,152 (19.538)	47,792 (11.948)	75,060 (15.02)	245,680 (57.7)
Adjoining LEBP (AS4)	23.33	23,330 (5.8325)	23,330 (5.8325)	23,330 (5.8325)	29,162.5 (5.8325)	99,152.5 (23.33)
Within LEBP (i) (AS6)	3.43	3,430 (0.8575)	3,430 (0.8575)	3,430 (0.8575)	4,287.5 (0.8575)	14,577.5 (3.43)
West Paddock (AS8)	1.94	7,760 (1.94)	0 (0)	0 (0)	0 (0)	7,760 (1.94)
RO Matrix Park (OS2)	2.03	8,120 (2.03)	0 (0)	0 (0)	0 (0)	8,120 (2.03)
Leyland and Farington	30.73	42,640 (10.66)	26,760 (6.69)	26,760 (6.69)	33,450 (6.69)	129,610 (30.73)
South Rings (AS1)	5.147	19,322 (5.147)	0 (0)	0 (0)	0 (0)	19,322 (5.147)
Kellett Lane (AS7)	4.42	17,680 (4.42)	0 (0)	0 (0)	0 (0)	17,680 (4.42)
North of School Lane (EMP3/2))	0.785	314 (0.0785)	1,256 (0.35325)	0 (0)	1,570 (0.35325)	3,140 (0.785)
Club Street (EMP3/2)	3.22	1,288 (0.322)	5,796 (1.449)	0 (0)	7,245 (1.449)	14,329 (3.22)
Lostock Hall, Bamber Bridge & Penwortham	13.572	38,604 (9.9675)	7,052 (1.80225)	0 (0)	8,815 (1.80225)	54,471 (13.572)
-	-	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
South Ribble Eastern Area	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
-	-	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
South Ribble Western Area	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
South Ribble Total	44.302	81,244 (20.6275)	33,812 (8.49225)	26,760 (6.69)	42,265 (8.49225)	184,081 (44.302)
TOTAL	158.48	188,600 47.5265	143,264 35.85525	161,232 40.308	173,675 34.79225	666,771 158.48

** Denotes an estimate.

Table 4.6: Owner Specific Sites (without Planning Permission)

Site (LP Policy Ref in brackets)	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Chorley Central	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Chorley East	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Chorley West	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Chorley Total	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston City Centre	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston Inner Area	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston Western Suburbs	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston Eastern Suburbs	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston Rural	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Preston Total	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Farington Road (AS3)	9.2	9,200 (2.3)	9,200 (2.3)	9,200 (2.3)	11,500 (2.3)	39,100 (9.2)	
Leyland Business Park (OS6)	2.1	2100 (0.525)	2100 (0.525)	2100 (0.525)	2,625 (0.525)	8,925 (2.1)	
Leyland and Farington	11.3	11,300 (2.825)	11,300 (2.825)	11,300 (2.825)	14,125 (2.825)	48,025 (11.3)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Lostock Hall, Bamber Bridge & Penwortham	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Samlesbury Aerodrome (SS33)*	142.96	142,960 (35.74)	142,960 (35.74)	142,960 (35.74)	178,700 (35.74)	607,580 (142.96)	
South Ribble Eastern Area	142.96	142,960 (35.74)	142,960 (35.74)	142,960 (35.74)	178,700 (35.74)	607,580 (142.96)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Western Area	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Total	154.26	154,260 (38.565)	154,260 (38.565)	154,260 (38.565)	192,825 (38.565)	655,605 (154.26)	
TOTAL	154.26	154,260 (38.565)	154,260 (38.565)	154,260 (38.565)	192,825 (38.565)	655,605 (154.26)	

* Gross site area identified for aerodrome, which includes already developed areas and those parts of the site in the Green Belt. The net developable area will be significantly less than the identified figure..

Employment Commitments

4.22 Employment commitments, which can be located within and outside of employment allocations, can also be defined as employment 'gains'. They comprise of:

- Sites with planning permission for employment use where development has not started; and
- Sites with planning permission under construction at the time of the survey.

4.23 In addition, there is also a need to look at employment 'losses'. These can be defined as sites with planning permission which would result in the loss of an existing employment use / building or the loss / reduction of an identified employment allocation to alternative non-B Class form of development. The consideration of losses will assist in establishing the net change of employment land. In certain circumstances, tables within the employment land study may record two entries for one site where, for example, planning permission exists for the redevelopment of an existing employment use to another form of employment development.

4.24 The tables below outline all the committed sites within Chorley, Preston and South Ribble.

Table 4.7: Commitments within Local Plan Employment Allocations

Site	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Stump Lane (16)	0.98	0 (0)	3,800 (0.98)	0 (0)	0 (0)	3,800 (0.98)	
M61/ Botany (2)	1.18	0 (0)	0 (0)	3,312 (1.18)	0 (0)	3,312 (1.18)	
M61/ Botany (2)	0.36	929 (0.36)	0 (0)	0 (0)	0 (0)	929 (0.36)	
M61/ Botany (2)	4.2	2,800 (0.7)	2,800 (0.7)	5,600 (1.4)	7,000 (1.4)	18,200 (4.2)	
Ackhurst/ Common Bank Employment (5)	0.74	1,100 (0.37)	1,124 (0.37)	0 (0)	0 (0)	2,224 (0.74)	
Southern Commercial/ Buckshaw Village (38)	4.7	2,814 (0.75)	2,814 (0.75)	5,628 (1.6)	7,035 (1.6)	18,291 (4.7)	
Regional Investment Site Buckshaw (39)*****	4.56	0 (0)	0 (0)	3,648 (0.912)	18,240 (3.648)	21,888 (4.56)	
Regional Investment Site Buckshaw (39)*****	1.93	0 (0)	0 (0)	1,544 (0.386)	7,720 (1.544)	9,264 (1.93)	
Regional Investment Site Buckshaw (39)*****	2.41	0 (0)	0 (0)	1,928 (0.482)	7,712 (1.928)	9,640 (2.41)	
Chorley Central	21.06	7,643 (2.18)	10,538 (2.8)	21,660 (5.96)	47,707 (10.12)	87,548 (21.06)	
	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley East	0	0	0	0	0	0	

Site	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
		(0)	(0)	(0)	(0)	(0)	
Twin Lakes Industrial Estate	1.9	1,150 (0.475)	1,150 (0.475)	2300 (0.95)	0 (0)	4,600 (1.9)	
Chorley West	1.9	1,150 (0.475)	1,150 (0.475)	2300 (0.95)	0 (0)	4,600 (1.9)	
Chorley Total	22.96	8,793 (2.655)	11,688 (3.275)	23,960 (6.91)	47,707 (10.12)	92,148 (22.96)	
Hill Street Car Park	0.2	21,774 (0.2)	0 (0)	0 (0)	0 (0)	21,774 (0.2)	
Preston City Centre	0.2	21,774 (0.2)	0 (0)	0 (0)	0 (0)	21,774 (0.2)	
-	0.0	0 (0)	0 (0)	+0 (0)	0 (0)	0 (0)	
Preston Inner Area	0.0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Riversway (Site 13C)(20)	0.93	5,874 (0.93)	0 (0)	0 (0)	0 (0)	5,874 (0.93)	
Preston Western Suburbs	0.93	5,874 (0.93)	0 (0)	0 (0)	0 (0)	5,874 (0.93)	
Preston East Employment Area (7)*	18.0	6,750 (2.26)	0 (0)	0 (0)	47,000 (15.74)	53,750 (18.0)	
Red Scar (excluding site F & H) (17)	8.97	0 (0)	0 (0)	17,940 (4.485)	22,425 (4.485)	40,365 (8.97)	
Red Scar (Site F) (17)	10.2	0 (0)	0 (0)	20,400 (5.1)	25,500 (5.1)	45,900 (10.2)	
Red Scar (Site H) (17)	2.75	0 (0)	0 (0)	5,500 (1.375)	6,875 (1.375)	12,375 (2.75)	
Preston Eastern Suburbs	39.92	6,750 (2.26)	0 (0)	43,840 (10.96)	101,800 (26.7)	152,390 (39.92)	
Land at Whittingham Hospital (87)	3.83	9,000 (3.83)	0 (0)	0 (0)	0 (0)	9,000 (3.83)	
Preston Rural	3.83	9,000 (3.83)	0 (0)	0 (0)	0 (0)	9,000 (3.83)	
Preston Total	44.88	43,398 (7.22)	0 (0)	43,840 (10.96)	101,800 (26.7)	189,038 (44.88)	
Carr Lane (AS5)*	2.7	2,700 (0.675)	2,700 (0.675)	2,700 (0.675)	3,375 (0.675)	11,475 (2.7)	
RO Matrix Park (OS2)	12.77	0 (0)	0 (0)	0 (0)	28,394 (12.77)	28,394 (12.77)	
LEBP (OS5 & EMP3/4)****	14.1	0 (0)	0 (0)	32,920 (14.1)	0 (0)	32,920 (14.1)	
Leyland and Farington	29.57	2,700 (0.675)	2,700 (0.675)	35,620 (14.775)	31,769 (13.445)	72,789 (29.57)	
Kellett Lane(AS7)**	0.51	2,040	0	0	0	2,040	

Site	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
		(0.51)	(0)	(0)	(0)	(0.51)	
South Rings(AS1)	6.03	24,120 (6.03)	0 (0)	0 (0)	0 (0)	24,120 (6.03)	
Lostock Hall, Bamber Bridge & Penwortham	6.54	26,160 (6.54)	0 (0)	0 (0)	0 (0)	26,160 (6.54)	
-	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Eastern Area	(0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Western Area	(0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Total	36.11	28,860 (7.215)	2,700 (0.675)	35,620 (14.775)	31,769 (13.445)	98,949 (36.11)	
TOTAL	(103.95)	81,001 (17.09)	14,388 (3.95)	103,420 (32.645)	183,204 (50.265)	382,063 (103.95)	

* Floorspace details are correct however the site area split is an estimate based on B1:B8 ratio split.

** The entire site has outline planning permission for employment development with a reserved matters planning application pending consideration on 0.87 hectares for 3,296 sqm. B1, B2 and B8 employment development.

*** Committed floorspace is an estimate only as detailed data is unavailable.

**** Relates to Waste Technology Centre, assumed Planning Use Class B2.

***** B2:B8 split is based on approximate details in outline permissions for site.

Table 4.8: Commitments Outside of Local Plan Employment Allocations

Sub Area	No. of PP's	Site Area (ha)	Capacity					Total B Class
			Floorspace Estimate m ² (site area in hectares)					
			B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Cowling Business Park (28)	1	0.56	0 (0)	0 (0)	750 (0.56)	0 (0)	750 (0.56)	
Euxton Tile Supplies Ltd, Wigan Road	1	0.95	0 (0)	0 (0)	0 (0)	1960 (0.95)	1960 (0.95)	
Land South of NIS Building, Ackhurst Road	1	0.84	1056 (0.84)	0 (0)	0 (0)	0 (0)	1056 (0.84)	
Millennium House	1	0.13	1339 (0.13)	0 (0)	0 (0)	0 (0)	1339 (0.13)	
Chorley Central	4	2.48	2,395 (0.97)	0 (0)	750 (0.56)	1960 (0.95)	5,105 (2.48)	
Alto Plant Service Depot, Railway Road, Brinscall	1	0.37	0 (0)	0 (0)	248 (0.37)	0 (0)	248 (0.37)	
Chorley East	1	0.37	0 (0)	0 (0)	248 (0.37)	0 (0)	248 (0.37)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley West	0	0	0	0	0	0	0	

Sub Area	No. of PP's	Site Area (ha)	Capacity					Total B Class
			Floorspace Estimate m ² (site area in hectares)					
			B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
			(0)	(0)	(0)	(0)	(0)	
Chorley Total	5	2.85	2,395 (0.97)	0 (0)	998 (0.93)	1,960 (0.95)	5,353 (2.85)	
Potential Central Business District (79)	2	0.457	12,700 (0.457*)	0 (0)	0 (0)	0 (0)	12,700 (0.457*)	
Avenham Street (56)	1	0.26	2,955 (0.26)	0 (0)	0 (0)	0 (0)	2,955 (0.26)	
Walker Street/ Great Shaw Street (60)	1	0.03	0 (0)	0 (0)	0 (0)	313.91 (0.03)	313.91 (0.03)	
Preston City Centre	4	0.747	15,655 (0.717)	0 (0)	0 (0)	313.91 (0.03)	15,968.91 (0.747)	
North Road A (69)	1	0.197	750 0.197	0 (0)	0 (0)	0 (0)	750 (0.197)	
Preston Inner Area	1	0.197	750 0.197	0 (0)	0 (0)	0 (0)	750 (0.197)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Western Suburbs	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Sharoe Green Hospital (29)	1	0.48	2,289 (0.48)	0 (0)	0 (0)	0 (0)	2,289 (0.48)	
Preston Eastern Suburbs	1	0.48	2,289 (0.48)	0 (0)	0 (0)	0 (0)	2,289 (0.48)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Rural	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Total	6	1.424	18,694 (1.394)	0 (0)	0 (0)	313.91 (0.03)	19,007.91 (1.424)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Leyland and Farington	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
OS7 North of Lostock Lane	1	0.7	2,419 (0.7)	0 (0)	0 (0)	0 (0)	2,419 (0.7)	
MU2 Lostock Gas Works**	1	1.5	900 (0.2)	4,000 (1)	0 (0)	1,654 (0.3)	6,554 (1.5)	
Lostock Hall, Bamber Bridge & Penwortham	2	2.2	3,319 (0.9)	4,000 (1)	0 (0)	1,654 (0.3)	8,923 (2.2)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Eastern Area	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	

Sub Area	No. of PP's	Site Area (ha)	Capacity					Total B Class
			Floorspace Estimate m ² (site area in hectares)					
			B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
			(0)	(0)	(0)	(0)	(0)	
South Ribble Western Area	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Total	2	2.2	3,319 (0.9)	4,000 (1)	0 (0)	1,654 (0.3)	8,923 (2.2)	
TOTAL	13	(6.474)	24,408 (3.264)	4,000 (1)	998 (0.93)	3,927.9 (1.28)	33,333.91 (6.474)	

* Denotes estimate

** The employment development commitment is only a small part of this large 10.5 hectare site – detailed information unavailable and assumed to be 1.5 hectares.

Table 4.9: Pending Losses of Employment Land and Floorspace

Sub Area	No. of PP's	Site Area (ha)	Capacity					Total B Class
			Floorspace Estimate m ² (site area in hectares)					
			B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Lex Auto Logistics, Pilling Lane	1	10.1	0 (0)	44,398 (10.1)	0 (0)	0 (0)	44398 (10.1)	
Chorley Central**	1	10.1	0 (0)	44,398 (10.1)	0 (0)	0 (0)	44398 (10.1)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley East	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Land at Junction of Salt Pitt Lane & Bluestone Lane Mawdesley (67)	1	0.2	0 (0)	0 (0)	266 (0.2)	0 (0)	266 (0.2)	
Chorley West	1	0.2	0 (0)	0 (0)	266 (0.2)	0 (0)	266 (0.2)	
Chorley Total	2	10.3	0 (0)	44,398 (10.1)	266 (0.2)	0 (0)	44664 (10.3)	
Walker Street/ Great Shaw Street (60)	1	0.03	0 (0)	313.91 (0.03)	0 (0)	0 (0)	313.91 (0.03)	
Potential Business District (79)	1	0.246	984* 0.246	0 (0)	0 (0)	0 (0)	984* 0.246	
Preston City Centre	2	0.276	984* (0.246)	313.91 (0.03)	0 (0)	0 (0)	1,297.91 (0.276)	
North Road B/ Kent Street (34)	2	0.79	0 (0)	0 (0)	1,240 (0.79)	0 (0)	1,240 (0.79)	
Tulketh Mill (73)	1	2	0 (0)	1,782 (2)	0 (0)	0 (0)	1,782 (2)	
Preston Inner Area	3	2.79	0 (0)	1,782 (2)	1,240 (0.79)	0 (0)	3,022 (2.79)	

Sub Area	No. of PP's	Site Area (ha)	Capacity					Total B Class
			Floorspace Estimate m ² (site area in hectares)					
			B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Western Suburbs	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Skeffington Road/ Castleton Road (5)	1	0.352	0 (0)	0 (0)	1,408* 0.352	0 (0)	1,408* 0.352	
Warehouses, Home Slack Lane (3)	1	2.036	0 (0)	0 (0)	4,180 (2.036*)	0 (0)	4,180 (2.036*)	
Preston Eastern Suburbs	2	2.388	0 (0)	0 (0)	5,588* (2.388*)	0 (0)	5,588* (2.388)*	
Depot, Whittingham Lane, Broughton (16)	1	2.266	0 (0)	0 (0)	9,064* (2.66)	0 (0)	9,064* (2.66)	
Preston Rural	1	2.266	0 (0)	0 (0)	9,064* (2.66)	0 (0)	9,064* (2.66)	
Preston Total	7	8.114	984 (0.246)	2,095.91 (2.03)	15,892 (5.838)	0 (0)	18,971.91 (8.114)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Leyland and Farington	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
SS23 Pear Tree Street	1	0.15	0 (0)	710 (0.15)	0 (0)	0 (0)	710 (0.15)	
SS27 Aspden Street, Bamber Bridge	1	0.205	0 (0)	0 (0)	0 (0)	1,050 (0.205)	1,050 (0.205)	
SS28 Hopwood Street, Bamber Bridge	1	0.046	0 (0)	0 (0)	0 (0)	459 (0.046)	459 (0.046)	
Lostock Hall, Bamber Bridge & Penwortham	3	0.401	0 (0)	710 (0.15)	0 (0)	1,509 (0.251)	2,219 (0.401)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Eastern Area	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Western Area	0	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Total	3	0.401	0 (0)	710 (0.15)	0 (0)	1,509 (0.251)	2,219 (0.401)	
TOTAL	13	19.465	984 (0.246)	47,203.91 (12.28)	16,158 (6.038)	3,369 (0.901)	67,714.91 (19.465)	

* Denotes estimate

** Figures for Chorley exclude any losses of employment floorspace from the Group 1 Buckshaw site.

Table 4.10: Unallocated Sites without Planning Permission but with Potential Capacity to provide Additional Employment Development

Site (LP Policy Ref in brackets)	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Common Bank Bleach Works (20)	2.95	0 (0)	3,000 (0.75)	3,000 (0.75)	7,250 (1.45)	13,250 (2.95)	
Chorley Central	2.95	0 (0)	3,000 (0.75)	3,000 (0.75)	7,250 (1.45)	13,250 (2.95)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley East	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley West	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Chorley Total	2.95	0 (0)	3,000 (0.75)	3,000 (0.75)	7,250 (1.45)	13,250 (2.95)	
Winckley Square (SW)/ East Cliff – car park area (65)	1.641	6,564* (1.641)	0 (0)	0 (0)	0 (0)	6,564* (1.641)	
Preston City Centre	1.641	6,564* (1.641)	0 (0)	0 (0)	0 (0)	6,564* (1.641)	
Jubilee Trading Estate (81)	0.192	0 (0)	0 (0)	768* (0.192)	0 (0)	768* (0.192)	
Preston Inner Area	0.192	0 (0)	0 (0)	768* (0.192)	0 (0)	768* (0.192)	
Cottam Hall Brickworks (12)	0.69	2,776 (0.69)	0 (0)	0 (0)	0 (0)	2,776 (0.69)	
Cottam Local Centre (13)	0.3	1,440 (0.3)	0 (0)	0 (0)	0 (0)	1,440 (0.3)	
Riversway B (25)	9.91	3,964 (0.991)	11,892 (2.973)	11,892 (2.973)	14,865 (2.973)	42,613 (9.91)	
Preston Western Suburbs	10.9	8,180 (1.981)	11,892 (2.973)	11,892 (2.973)	14,865 (2.973)	46,829 (10.9)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Eastern Suburbs	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Rural	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Preston Total	12.733	14,744 (3.622)	11,892 (2.973)	12,660 (3.165)	14,865 (2.973)	54,161 (12.733)	
Moss Side Test Track (MU1)	3.933	5,244 (1.311)	5,244 (1.311)	0 (0)	6,555 (1.311)	17,043 (3.933)	

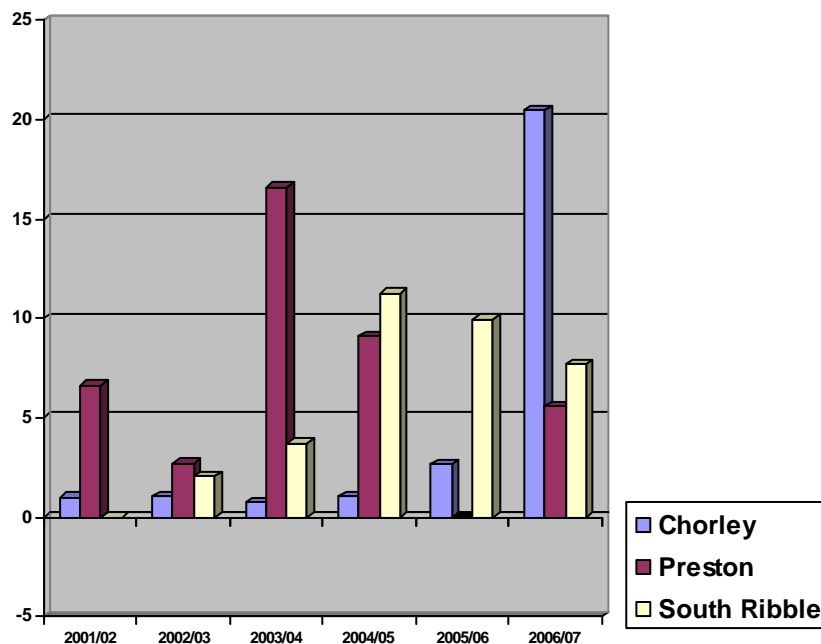
Site (LP Policy Ref in brackets)	Available Area (hectares)	Capacity					Total B Class
		Floorspace Estimate m ² (site area in hectares)					
		B1 a Office	B1b&c Ind	B2 Ind	B8 W&D		
Leyland and Farington	3.933	5,244 (1.311)	5,244 (1.311)	0 (0)	6,555 (1.311)	17,043 (3.933)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
Lostock Hall, Bamber Bridge & Penwortham	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
-	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
South Ribble Eastern Area	0	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	
MU3 Liverpool Road, Walmer Bridge	2.79	3720 (0.93)	3720 (0.93)	0 (0)	4650 (0.93)	12,090 (2.79)	
South Ribble Western Area	2.79	3720 (0.93)	3720 (0.93)	0 (0)	4650 (0.93)	12,090 (2.79)	
South Ribble Total	6.723	8,964 (2.241)	8,964 (2.241)	0 (0)	11,205 (2.241)	29,133 (6.723)	
Overall Total	36.826	23,708 (5.863)	23,856 (5.964)	73,640 (18.335)	33,320 (6.664)	154,524 (36.826)	

* Denotes estimate

Employment Completions

- 4.25 Although completions (before 2005) will be captured in ONS data, it is useful to understand past trends in terms of their level, distribution and type to help inform market demand analysis with regards to the rate of development. **Chart 4.1** overleaf sets out details of completions between 2000 and 2005:

Chart 4.1 – Completions/ take up of employment land (in hectares) in Chorley, Preston and South Ribble (2001 – 2006)



Source: Chorley Employment Land Monitoring Report 2007, South Ribble Employment Land Monitoring Report 2007 and Preston Employment Land Data 2007.

- 4.26 Over this period, approximately 102 hectares of employment land has been taken up within the Central Lancashire area, which equates to an average gross completion rate of just over 17 hectares per annum.
- 4.27 Up to 2005/06, the take up of employment land in Chorley was by far the weakest of the three council areas. However, during 2006/07, the employment land take up in Chorley increased dramatically with 20.45 hectares of land taken up in for employment purposes, largely attributable to development of the Regional Investment Site at Buckshaw. This brings Chorley's rate of development to approximately 4.5 hectares per annum.
- 4.28 South Ribble experienced very slow rate of employment land take up in 2001/02 but gradually increased from 2002/03 and stabilised thereon. From 2004/05, South Ribble has experienced a gradual decline in the take up of employment land but this is declining at a stable rate. Overall, South Ribble has experienced a rate of growth of employment land take up of 5.78 hectares per annum during the assessment period.
- 4.29 As can be predicted, Preston had the highest employment land take up of the three local authorities during the period between 2001/02 and 2006/07 with a total of 6.7 hectares per annum on average. This rate of take-up has not been constant however, with a peak of 16.62 hectares in 2003/04 contrasting to an overall net loss in employment land in 2005/06

Quantitative Supply Commentary

Central Lancashire Area

Existing Stock

- 4.30 ONS 2006 data identifies that the Central Lancashire Area has over 3,000,000 sqm of employment floorspace. Over 40% of this figure is attributable to manufacturing / industrial. Less than 20% is recorded as office floorspace.
- 4.31 In October 2007, there was around 250,000 sqm. of existing vacant employment space, accounting for approximately 8% of the total stock of premises. The vast majority (70%) of this stock is vacant industrial / warehouse premises, with 30% offices.
- 4.32 The size distribution of vacant office, light industry, manufacturing and warehouse premises is quite varied when the Central Lancashire Area is considered as a whole, albeit that vacancies are most concentrated within smaller properties, notably within premises of less than 500 sqm.

Employment Land Supply

- 4.33 Vacant employment allocations without planning permission and other commitments provide a gross total land supply of approximately 255 hectares across the Central Lancashire City Region, divided as follows:

Table 4.11: Gross Land Supply Across the Central Lancashire Area

	Office	Industrial /Manufacturing	Wholesale Distribution
Total Area (255 ha)	69ha	100ha	86ha
Percentage of Supply	28%	39%	33%

- 4.34 Approximately 156 hectares of gross employment land supply (which equates to around 60% of the overall gross total) is derived from vacant employment allocations without planning permission. Most of the remaining supply comes from employment allocations with planning permission, with only around 6 hectares being attributable to sites with planning permission for employment development on land outside of allocations.
- 4.35 When also considering the potential contribution of 'Other Qualitative Assessment Sites' (i.e. unallocated sites without planning permission but assessed as part of this study with potential to provide additional employment floorspace), gross total land supply increases to 292 hectares.
- 4.36 Net land supply (i.e. excluding other QA sites as defined in the preceding paragraph and included in Table 4.10 and also taking into account pending losses identified in Table 4.9) for the Central Lancashire Area decreases to around 248 hectares as shown below. The majority of pending losses are concentrated in the industrial / manufacturing sector.

Table 4.12: Net Land Supply Across the Central Lancashire Area

	Office	Industrial /Manufacturing	Wholesale Distribution
Total Area (248 ha)	69ha	95ha	85ha
Percentage of Supply	28%	38%	34%

Chorley Borough Total

Existing Stock

4.37 Chorley Borough Council's area provides approximately 21% of total employment floorspace within Central Lancashire. Of this floorspace (roughly 636,000 sqm.) almost 50% is made up of manufacturing / industrial floorspace followed by warehousing / distribution (38%) and offices (13%). In terms of vacancies, there are a greater number of vacant warehousing / industrial units (52) than vacant offices (37) in Chorley. Also, the largest number of vacant offices are those that fall within the smallest size band of 0-100 sqm. whereas the highest number of warehousing and industrial units are in size band 101-500sqm.

Employment Land Supply

4.38 Compared with South Ribble and Preston, Chorley Borough has the largest area in hectares of allocated employment land without planning permission at approximately 55 hectares. Key sites contributing to this figure include Botany / Great Knowley, Cowling Farm and Southern Commercial / Buckshaw Village.

4.39 In contrast, Chorley Borough has the lowest level of employment commitments on allocated sites in comparison to the other two Council areas, although the contribution from this particular component of supply is still important equating to around 21 hectares (although the relatively high level of pending losses within the area does reduce the net commitment figure). The majority of employment commitments are identified for B8 warehousing development at the Buckshaw Regional Investment Site.

Chorley Central

Existing Stock

4.40 In excess of 75% of the Borough's total existing floorspace is located in the Central sub area. This dominance is most pronounced in the office sector accounting for 85% of the Borough's total office supply. In terms of vacant premises, at approximately 85%, Chorley Central contains by far the vast majority of Borough's currently available stock. Vacant office and industrial / manufacturing floorspace in the Central area accounts for 84% and 96% of Chorley's vacant employment floorspace respectively.

Employment Land Supply

4.41 Chorley Central accounts for 96% of the Borough's total potential employment land supply. Virtually all of the land contributing to the Borough-wide figure attributable Local Plan Employment Allocations without permission is in the Central sub-area. All but one of the Borough's local plan commitments are in the Chorley Central sub-area. Similarly all but one of the commitments outside of the allocated Local Plan sites are also in this sub area.

4.42 The sub area also has the largest area of pending employment land losses, accounting for 98% of total within Chorley. This pending loss of employment land and floorspace is due almost entirely for proposals on the approximately 10 hectare Lex Auto Logistics site at Pilling Lane.

Chorley East

Existing Stock

4.43 Chorley East has an existing employment floorspace of 134,000 sqm. which accounts for 21% of Chorley's total. Approximately 70% of this floorspace is within the manufacturing / industrial sector. Existing office

floorspace in this sub area is limited, accounting for only 6% of the total floorspace.

- 4.44 At the time of the study, there were no vacant office or industrial and warehousing premises identified in Chorley East.

Employment Land Supply

- 4.45 Chorley East has a very small employment land supply of only 0.37 hectares which equates to below 1% of supply in the Borough. Additionally, no further sites have been identified through this study with capacity to provide additional employment floorspace in this sub area.

Chorley West

Existing Stock

- 4.46 Chorley West has the smallest amount of existing employment floorspace in any of the sub areas defined for Chorley Borough, accounting for just below 10%. Of the 62,000sqm of floorspace within this sub area, almost 40,000 sqm is in the warehousing and distribution sector. In October 2007, there were three offices and eight warehousing /industrial units vacant within the sub area, accounting for a total of 3,264 sqm. of available floorspace. No individual vacant unit was greater than 1,000sqm.

Employment Land Supply

- 4.47 Chorley West has a total employment land supply of 2.5 hectares which accounts for just over 3% of the Borough's total. The only allocated employment site without planning permission is located in Mawdesley and has an estimated potential to provide 2,400 sqm. of B1 office and industrial development.
- 4.48 The only employment commitment comprises vacant land at the Twin Lakes Industrial Estate site which is estimated could provide a floorspace of up to 4,600 sqm. for B1 and B2 development.

Preston City Total

Existing Stock

- 4.49 The Preston City Council area provides approximately 1,320,000 sqm. of employment floorspace of which 28.5% is within the office sector, 51% in manufacturing / industrial and 20.5% in warehousing or distribution. As would be expected, the majority of offices are located within the City Centre sub area, accounting for 58% of total office floorspace within the local authority area. The Inner Area provides the largest amount of existing manufacturing and, warehouse and distribution floorspace.
- 4.50 The office vacancy rates are highest within the City Centre sub area in terms of the number of vacant premises, focussed particularly within premises of less than 500 sqm (however the Eastern Suburbs has the largest amount of vacant office floorspace, largely attributable to a number of vacancies in excess of 2,000 sqm). In terms of floorspace, the level of vacancy for industrial and warehousing is highest in the Eastern sub area, accounting for 9,543 sqm. The Western sub area however had the largest number of vacant premises at the time of the study.

Employment Land Supply

- 4.51 When excluding Other QA and Owner Specific sites, Preston has the largest employment land supply of the three local authorities in Central Lancashire. It has a total net employment land supply of around 96 hectares, split unevenly between the three employment sectors. The

smallest employment land supply is for offices which is estimated represents around 20% of the total land supply followed by manufacturing at 36% and the remaining 44% for warehousing and distribution.

- 4.52 Over half of the employment land supply is derived from allocated employment sites without planning permission with potential to deliver 55 hectares of new employment development. The largest sites contributing to this total include the Preston East Employment Area and Broughton Business Park. Excluding pending losses, approximately 46 hectares of land has also been committed for new employment development, made up largely from extant planning permissions at the Preston East Employment Area and also a number of sites at Red Scar.
- 4.53 Through qualitative assessment, the study has also identified a potential for a further 12 hectares of land which could contribute toward employment development (i.e. vacant sites assessed as part of this study which are currently not allocated or committed for employment development – see Table 4.10).

Preston City Centre

Existing Stock

- 4.54 Of Preston City Centre's total existing floorspace, approximately 2/3rds is in the office sector. At the time of the study, there were 63 vacant office premises in the City Centre (50% of the total number of offices vacant in the local authority area). However, in terms of floorspace, this accounts for only 31% of the Council's total, reflecting the relatively small size of units available in the City Centre. The level of office vacancy is likely to be significantly influenced by the often old and relatively poor quality secondary nature of existing supply, as reflected in the previous office needs assessment.
- 4.55 Manufacturing and industrial units account for just over 7% of all employment floorspace within the City Centre whereas warehouse and distribution floorspace accounts for roughly 15% of total employment floorspace within this sub area. In terms of vacant industrial and warehouse premises, 27% of Preston's total floorspace is located in the Preston City Centre sub area.

Employment Land Supply

- 4.56 Compared to other sub areas within Preston, the City Centre has a very limited amount of identified employment land supply, contributing to <1% of Preston's overall total. There are no allocated employment sites in the City Centre and supply is made up of a small number of commitments, most notably Hill Street Car Park, to be developed predominantly for high density office development.

Preston Inner Area

Existing Stock

- 4.57 This sub area contains the largest proportion of Preston's existing employment floorspace (over 40%). Of this existing floorspace, around 12% is in the office sector and the remainder is split fairly evenly between manufacturing and warehouse / distribution. Vacant industrial and warehousing premises (15 units) in this area accounts for around 23% of total vacant industrial / manufacturing floorspace in the Council area. There are also 23 vacant offices, made up of predominantly smaller units accounting for 15% of total vacant office units in Preston.

Employment Land Supply

- 4.58 There is only one allocated site within this sub area (Ringway / Falkland Street) and this is identified with potential for office redevelopment (Ringway / Falkland Street). The contribution of other sites with planning permission for employment development is also very limited at less than 0.2 hectares.

Preston Western Suburbs

Existing Stock

- 4.59 Existing floorspace in the Western Suburbs is a relatively low proportion (13%) when compared to Preston as a whole. The existing stock is fairly evenly split between office, manufacturing / industrial, and warehouse / distribution. In terms of numbers of units, at the time of the study vacancy levels appear comparatively high in the sub area, accounting for just over 50% of the overall number of vacant industrial / warehouse units in Preston. However, given the small floorspace size of these units, they account for less than 19% of the Council's overall total vacant industrial / warehousing floorspace. All the vacant industrial / warehousing units are below 1000 sqm. There are 13 vacant office premises within the sub area, most of which are in the size range of 101 and 500 sqm.

Employment Land Supply

- 4.60 It is estimated that the existing employment land supply within the Preston Western Suburbs area has the potential to provide up to 12,694sqm. of employment floorspace over 2.61 hectares of land. This is largely attributed to two sites at Preston Riversway (Site 13C and D2).

- 4.61 Through qualitative assessment, three other non allocated and uncommitted sites were identified with capacity to potentially contribute toward employment land. These sites include Riversway Phase B (9.91 hectares), Cottam Hall brickworks (0.69 hectares) and Cottam Local Centre (0.3 hectares) and collectively have potential to contribute up to 10.9 hectares of employment land toward Preston Western Suburbs supply.

Preston Eastern Suburbs

Existing Stock

- 4.62 Around 20% of Preston's existing employment stock is in the Eastern Suburbs. Over half of this employment stock is for Class B8 use with the smallest proportion (under 14%) for office use. There are 26 vacant office units within this sub area accounting for approximately 13% of all vacant office floorspace within the local authority. There are 13 vacant warehouse / industrial premises in the eastern suburbs, accounting for almost 30% of total vacant floorspace in Preston.

Employment Land Supply

- 4.63 A large proportion of Preston's employment land supply (without planning permission) is located in the Eastern Suburbs sub area. For example, the uncommitted part of the Preston East Employment Area is nearly 17 ha with an estimated capacity to provide in excess of 70,000 sqm. of additional employment floorspace. There is also already a commitment to provide in excess of 50,000 sqm. of employment land over 18 hectares at Preston East Employment Area and a further approximately 100,00 sqm. within Red Scar proposed over a number of sites which collectively, cover an area of around 22 hectares.

Preston Rural

Existing Stock

4.64 The Preston Rural area has the smallest existing employment floorspace in Preston, accounting for just 3% of Preston's total. The majority of existing floorspace in this sub area (65%) is in the manufacturing / industrial sector. There are no vacant offices or industrial / warehousing premises identified in this sub area.

Employment Land Supply

4.65 Land North of Eastway (formerly known as Broughton Business Park) is nearly 25 hectares and is estimated as having a potential to provide an employment floorspace of over 100,000 sqm. In addition, a further employment commitment in the Preston Rural sub area exists on land at Whittingham Hospital (3.83 hectares) which has extant planning permission to provide 9,000 sqm. of B1 office floorspace. There is also a loss of an estimated 9,064 sqm. of Industrial floorspace at the depot site in Whittingham Lane in Broughton which has been committed for residential redevelopment.

South Ribble Total

Existing Stock

4.66 South Ribble provides 1,091,000 sqm. of existing employment floorspace, accounting for 35.8% of total employment floorspace within Central Lancashire. The majority of floorspace is within the manufacturing / industrial sector (52%), followed by warehouse / distribution which accounts for 39% of total employment floorspace within South Ribble. The majority of industrial / manufacturing and warehouse / distribution floorspace is located within two sub areas (Leyland and Farington, and Lostock Hall, Bamber Bridge and Penwortham). The Eastern and Western Parishes provide the least amount of employment floorspace.

4.67 Employment vacancies are focused in Leyland and Farington as well as in Lostock, Bamber Bridge and Penwortham (with only two vacancies falling outside of these sub areas). 47 vacant office units were identified which account for almost 40,000sqm. of vacant floorspace, (representing a total of 46.8% of total vacant office floorspace within Central Lancashire). This is mainly attributed to a large single office vacancy of 27,870 sqm. within the Lostock Hall, Bamber Bridge and Penwortham sub area. Leyland & Farington has the highest quantity of vacant industrial and warehousing floorspace as well as the number of vacant premises in South Ribble, accounting for 56% of total vacant floorspace within the Borough.

Employment Land Supply

4.68 There is 44.3 hectares of uncommitted allocated employment land within South Ribble which is estimated has the potential to provide approximately 185,000 sqm. of employment floorspace. Land adjacent to LEBP makes a significant contribution to this total, providing in excess of 23 hectares. In addition, a further approximately 38 hectares has planning permission for employment development, the majority of which is located within identified employment allocations, with land RO Matrix Park and land at LEBP making the largest contribution to this total.

4.69 Approximately 154 hectares is also identified as future Owner Specific opportunities. This very high total is largely attributable to land at Samlesbury Aerodrome which is likely to come forward for aviation related employment development.

Leyland and Farington

Existing Stock

- 4.70 Existing employment floorspace in Leyland and Farington accounts for over 40% of the Borough's total. The majority of existing employment land is in the manufacturing / industrial sector (67%) with relatively little in office use (11.2%). Only 14% of South Ribble's vacant offices were identified as being located in Leyland and Farington. The majority of these are smaller offices of 100 sqm. or below. However, almost 63% of South Ribble industrial and warehouse vacancies were located in this sub area at the time of assessment.

Employment Land Supply

- 4.71 There is approximately 30 hectares of allocated and uncommitted employment land within Leyland and Farington, predominantly attributable to land adjoining LEBP. A number of allocated employment sites also have extant planning permission to provide a further approximately 30 hectares of employment land. Land within Lancashire Business Park is the largest of these commitments (with planning permission for a waste technology centre), followed closely by land RO Matrix Park. In addition, 11.3 hectares is allocated employment land that is likely to come forward for Owner Specific employment development but has not yet been committed.

Lostock Hall, Bamber Bridge and Penwortham

Existing Stock

- 4.72 Of the four South Ribble sub areas, Lostock Hall, Bamber Bridge and Penwortham has the largest existing employment floorspace accounting for 45% of South Ribble's total. The manufacturing / industrial and warehousing / distribution sectors are dominant in this sub area accounting for 47% and 49% of total employment floorspace (within the sub area) respectively. Less than 5% of this floorspace is in office use. A very large proportion of vacant office floorspace in South Ribble is located within this sub area (86%) and approximately 35% of vacant industrial / warehousing floorspace within the Borough is in this sub area, with approximately 50% of vacant industrial / warehousing units with a floorspace area of 500 sqm. or less.

Employment Land Supply

- 4.73 There are four allocated but uncommitted employment sites within the sub area providing approximately 10 hectares of land for employment development. Planning permission also exists to provide around 26,000 sqm of new office floorspace on identified employment sites, most notably at South Rings. A further 2.2 hectares of employment land has been committed on unallocated sites to provide mainly for B1 (office) uses.

Eastern Parishes

Existing Stock

- 4.74 Only 6% of South Ribble's existing employment floorspace is located in the Eastern Parishes. Over 60% of this is in the manufacturing / industrial sector and less than 5% are offices, with the remaining 35% in the warehouse / distribution sector. No vacant premises were identified in the sub area through the study.

Employment Land Supply

- 4.75 There are no allocated employment sites in the Eastern Parishes. Samlesbury Aerodrome represents an extremely large possible future

employment opportunity but is identified as being Owner Specific and as such, will only contribute to land supply once any employment development obtains planning permission.

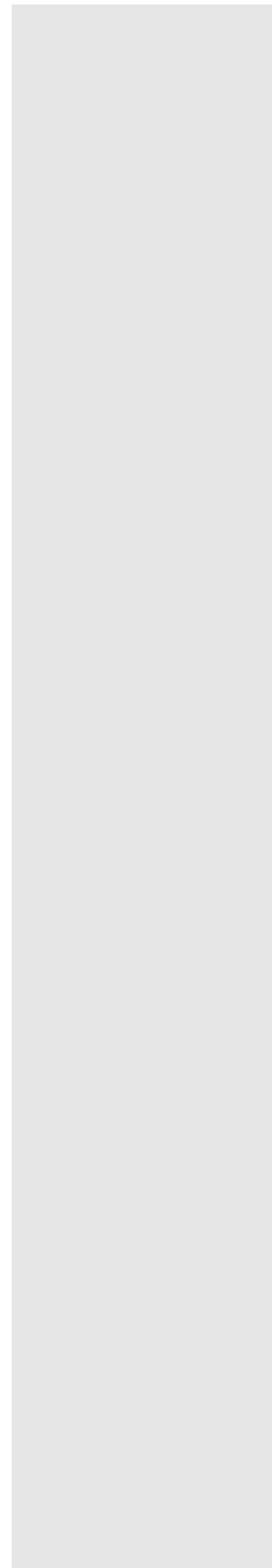
Western Parishes

Existing Stock

- 4.76 Only 5.4% of South Ribble's existing employment floorspace is in the Western Parishes. Nearly half of this is used as offices. No vacant offices were revealed in this sub area as part of the study and only one vacant industrial / manufacturing unit of 251 sqm was identified.

Employment Land Supply

- 4.77 There are no allocated sites without planning permission in Western Parishes. Additionally, there are no employment commitments outside of the allocated sites. However an unallocated and uncommitted mixed-use development site at Liverpool Road in Walmer Bridge has been assessed through the study with a potential capacity to provide approximately 12,0000 sqm. of B1 office, industrial and B8 warehousing development over 2.79 hectares.



5. Existing Employment Land & Premises – Qualitative Assessment of Supply

Approach

- 5.1 In addition to a quantitative assessment of supply, it is important to undertake a qualitative review of sites, including, in relation to employment allocations.
- 5.2 The purpose of undertaking such an assessment is to rigorously and systematically appraise all local plan employment land allocations and commitments and other sites identified by the Council in terms of market attractiveness, environmental sustainability and strategic planning / economic considerations.
- 5.3 Regard has been given to good practice in setting the appraisal criteria. In addition, consideration has been given to the Central Lancashire Office Needs Assessment (prepared by Drivers Jonas in 2006) in setting out the appraisal criteria to ensure consistency between the two studies. The main criteria used to assess sites are listed below. A comprehensive list of criteria, including associated detailed indicators, is reproduced at **Appendix 2**.

Table 5.1: Qualitative Assessment Appraisal Criteria

Factor	Appraisal Criteria	Description
Market Attractiveness	Accessibility to Motorway/ Strategic Road Network	Ease of access to the motorway/ strategic road network.
	Business Image	Availability/ marketing/ adjoining land uses/ road frontage visibility.
	Site Development Constraints	Environmental/ contamination/ flood risk/ access/ ownership/ pressure for alternative uses.
Strategic Planning and Sustainability	Accessibility to Non Car Transport Modes	Ease of access to public transport interchange (bus and rail).
	Enhancement of the Environment	Land type and potential to enhance the environment quality.
	Sequential Location	Regional city, town centre, urban area, out of urban area.
	Potential to Address Area of Deprivation	Location within an area of high/low economic activity/ affluent or deprived ward.

5.4 Results have been derived from:

- Site visits (undertaken July and August 2007);
- Information supplied by the Council;
- Review of reports and other available information sources; and
- Discussion with local commercial agents, site owners and Council Officers.

5.5 Detailed qualitative assessment results, are recorded for each site on pro-forma sheets which are included in separate technical appendices at **Appendix 3**.

5.6 Our assessment of commercial factors includes the consideration of the likely attractiveness of developed sites for employment re-use and redevelopment. For clarification, this particular element of the assessment is based on our site visit only and does not include detailed or specific analysis in terms of a building survey or financial viability assessment for example.

Site Scoring and Ranking

5.7 The completion of a rigorous and systematic qualitative appraisal allows the assessed sites to be scored against relevant criteria.

5.8 We have provided rating scores for each of the sites assessed. The rating score system applied is outlined in **Table 5.2** below:

Table 5.2: Qualitative Assessment – Rating Score System

Description	Rating Score
Poor	1
Moderate	2
Good	3
Very Good	4

5.9 Sites are scored against each of the two main factors included in **Table 5.1** on the previous page. Separate totals are recorded against commercial and, sustainability and strategic planning considerations, based on an assessment against the more detailed criteria underlying the two main qualitative factors.

5.10 In accordance with good practice, the scoring system used is relatively simplistic in approach. For example, it does not seek to weight scores. It is therefore important to consider scores in conjunction with associated qualitative assessment commentary set out in this report chapter which summarises the key negative and positive factors identified.

5.11 A single amalgamated score for each site is not recorded as it is important to separate out market and sustainability/strategic planning factors. For example, although an unconstrained Greenfield site may be attractive to potential occupiers (and hence score well against certain commercial criteria), this score will unlikely be reflected when assessed against sustainable development / environmental resource considerations.

5.12 This qualitative exercise also enables sites to be categorised in terms of their importance and role. Tables categorising the role of the sites is included at the end of the qualitative assessment section. These tables only include those sites specifically identified by the Council for inclusion as part of this study.

5.13 Based on our understanding of the nature of the employment land market and types of employment sites within Central Lancashire, for operational purposes, the employment land / sites which have been specifically assessed are broadly sub-divided into the following categories/ rankings:

- a) **'Best Urban'** (BU) – Good quality relatively unconstrained sites suitable for local or incoming clients with a national/regional choice of locations.
 - b) **'Good Urban'** (GU) – Sites which may be subject to some constraints but with potential to be suitable for inward investors and / or locally-based businesses.
 - c) **'Other Urban'** (OU) – Sites which score poorly against one or more qualitative factors but which (could) perform a role in the employment hierarchy, including for local businesses.
 - d) **'Mixed Use'** (MU) – Sites identified with particular potential for mixed use development as a means of enhancing their current contribution to townscape quality and the quality of the local employment portfolio.
 - e) **'Other'** (O) – Moderate to poor quality sites with significant constraints and often in inappropriate locations. These have potential for (partial) de-allocation or release to other forms of development.
 - f) **'Owner-Specific'** (OS) – Allocations which are not likely to be available on the open market. In accordance with good practice, allocations which are only available for a specific occupier are excluded from available employment land totals until sites gain planning permission.
- 5.14 The categories enable a qualitative overview of the land portfolio available in each district to be provided against which future land requirements can be assessed.
- 5.15 Although site categories are often defined as 'Urban', there may be certain circumstances where sites falling within such categories are located outside or on the edge of existing settlements, with some of the larger allocations in Preston, Chorley and South Ribble being good examples.

Employment Allocations and Main Commitments

- 5.16 Due to large number of sites which have been subject to qualitative assessment (218 in total), commentary in the main body of the report focuses on main allocations, sites and commitments. In addition, summarised comments on the remainder of the sites are detailed in Table 5.8 later in this chapter.

Chorley

Chorley Central

Botany/ Great Knowley Site

- 5.17 The Botany/ Great Knowley site is a very large (circa 14 ha), irregular shaped, Greenfield site in current agricultural use. It adjoins the Leeds and Liverpool Canal and contains mature vegetation on a steeply sloping gradient. The site is in close proximity to Junction 8 of the M61 motorway. Access to the site could potentially be obtained from the adjacent roundabout. The site is allocated in the current Chorley Local Plan as employment land for B1 and B2 (EM1.4) and the Council adopted in March

2008 a Guiding Principles document to assist those wanting to develop the site.

Commercial (Market Attractiveness)

5.18 The site is in multiple private ownership and it is understood that there is no consensus amongst the owners in terms of their aspirations for this site. Bringing together the different site owners on a voluntary basis will likely be difficult to achieve. There are no marketing boards on the site but there have been a number of enquiries to the Council about this site over recent years. This includes a range of site suggestions on this site currently, for employment and leisure, housing and leisure and Green Belt.

5.19 Certain other constraints / requirements are also identified which could affect market interest and / or the capacity of site development – for example, TPOs over part of the site, drainage and access issues (requiring access over the Canal and into the adjoining M61 / Botany employment site), site topography and strategic landscaping requirements. That being said, the site is sufficiently large to offer a reasonable range of potential plot sizes and layouts to meet a variety of employment requirements.

Environmental Sustainability and Strategic Planning

5.20 There are a number of environmental/ strategic planning issues associated with this site. Its Greenfield nature and out of centre location reduce its sustainability performance and consideration could be given to a Sustainability Plan (a Travel Plan has already been prepared as part of a S106 Agreement). The site could deliver strategic economic objectives although it is located within an area of existing good economic activity and low deprivation.

Role within Employment Hierarchy

5.21 The site is ranked as ‘Good Urban’.

M61/ Botany

5.22 This is a reasonably large site (over 5 ha) bounded by (Junction 8 of) the M61, the A674 and Leeds and Liverpool Canal, beyond which is the Botany / Great Knowley employment allocation. Also adjacent to the site is Botany Bay Villages, a refurbished mill used as an antiques centre. The site is allocated for B1, B2, B8 and C2 uses in the adopted Local Plan.

5.23 The site has three extant predominantly employment planning commitments over the extent of the allocation. There is currently a site suggestion on this site for housing.

Commercial (Market Attractiveness)

5.24 This site appears commercially attractive. It is in such close proximity to motorway and a roundabout and site access to the A674 has been constructed. There are no flood or contamination issues associated with this site. The site is a good regular shape and site with no disturbances in the topography or significant development constraints. The site has no potentially sensitive neighbouring uses, its only existing neighbour being Botany Bay Villages

Environmental Sustainability and Strategic Planning

5.25 The site scores moderately against environmental considerations given its Greenfield nature and location outside of an urban area. Should the current extant planning permissions not be implemented then consideration could be given to a Green Travel Plan and Sustainability Plan. The site

could deliver strategic economic objectives although it is located within an area of existing good economic activity and low deprivation.

Role within Employment Hierarchy

5.26 The site is ranked as 'Good Urban'.

Chorley North Industrial Estate / Business Park

5.27 This is large and relatively modern and well maintained industrial estate with some frontage to the M61 motorway. The site adjoins residential uses, similar employment uses and open space. There are only small pockets of land still undeveloped within this 15 hectares industrial estate; these pockets could be used as infill development or for the expansion of existing occupiers.

Commercial (Market Attractiveness)

5.28 The site scores well in terms of market attractiveness. Access into the site is very good with good quality local roads, and Junction 8 of the M61 located nearby. There were limited 'to let' signs and the estate appears to be almost fully occupied. Ownership of the undeveloped areas is unknown but could be owner specific.

Environmental Sustainability and Strategic Planning

5.29 The site scores only moderately in environmental and strategic planning terms. The out of centre location and limited public transport accessibility reduces the site's overall sustainability performance. Additionally, care should be taken to ensure that further infill development does not detract from the overall environmental quality of the estate

Role within Employment Hierarchy

5.30 The site is ranked as 'Good Urban'.

Cowling Farm

5.31 The site is 8.2 hectares of vacant Greenfield land allocated for employment in the adopted Chorley Local Plan. The site is located in an area of mainly open countryside, however, is bounded to the north east by an employment use and to the west by the M61 motorway. The site is large, fairly regular in shape but undulating, requiring re-contouring due to sites prominent location and levels.

Commercial (Market Attractiveness)

5.32 The site is visible from the M61 but has not immediate access to it. There are however certain constraints which depress the site's performance in terms of market attractiveness, such as topography, the need for certain site services and upgrades, and access. With regards to access, although local roads are relatively wide and not congested there is currently no access direct into the site other than a small private track road. There are no signs on site of it being marketed. The site is owned by Chorley Borough Council.

Environmental Sustainability and Strategic Planning

5.33 There are a number of environmental and planning factors which limit its overall sustainability score. The site is outside of Chorley town centre with only moderate public transport access and no cycle or footpath links to the site. Implementation of a Green Travel Plan and Sustainability Plan for the site could be considered to assist in addressing environmental and sustainability concerns. The site does score relatively highly in terms of

economic regeneration as development of the site could significantly improve the moderate economic activity and high multiple deprivation score within this area.

Role within Employment Hierarchy

- 5.34 Due to infrastructure and sustainability constraints the site is currently ranked as 'Other Urban'.

Railway Road, Adlington

- 5.35 This site is approximately 2 hectares in size and is located adjacent to Adlington Railway station. There are a large number of mature trees at the front of the site, behind which are a number of unattractive warehouses and sheds in poor condition and a residential property. The site is overgrown and the access road into the site is poorly maintained. Part of the site is allocated in the Adopted Local Plan for an extension to the existing Park and Ride car park which should be retained as an important facility to serve Adlington Railway Station, with the remainder allocated for employment use.

- 5.36 There are currently two site suggestions on this site; one for housing and employment and one for housing and leisure.

Commercial (Market Attractiveness)

- 5.37 The site is flat and regular in size, and adjoining uses are sympathetic to employment uses. Despite this, it does not score highly in terms of its market attractiveness. It is currently not being marketed by agents and it is understood that the owners may not support (employment) development of the site. Some site preparation work will be necessary.

Environmental Sustainability and Strategic Planning

- 5.38 Site has good potential to deliver environmental sustainability benefits given its excellent proximity to the train station and Adlington town centre. The site is within an area of low economic activity and high deprivation. Allied to the site's current poor condition its redevelopment would be a positive environmental and planning benefit.

Role within Employment Hierarchy

- 5.39 The site is ranked as 'Other Urban'.

Red Bank, Carr Lane (Duxbury Business Park)

- 5.40 This 3.27 hectares site is relatively flat and bordered by mature trees and vegetation. It is predominantly vacant but does contain a car park and until recently was part being used by Birse Civils as a Site Office and for storing construction materials on a temporary basis in connection with construction of the link road.

- 5.41 Adjacent to the site is the Chorley Conference Centre (which has now closed), but also a purpose built modern office building used by Telent, some residential development currently under construction to the north of the site, and Green Belt land. The site is allocated in the Adopted Local Plan for B1 / A2, B2 and B8 employment uses.

Commercial (Market Attractiveness)

- 5.42 The site score moderately in market attractiveness terms. This is a regular, flat site with no contamination risks. The site has a single owner (United Utilities Properties Ltd). It is understood that United Utilities are supportive

of employment on the site although it does not appear to be actively marketed at present.

- 5.43 The site is located close to the Eaves Green Link Road. Creation of an access to the link road junction to serve the site has been provided. As part of the planning permission, there is a requirement for access into this site to be provided within two years of completion of the link road and to advertise the site for employment.
- 5.44 This site is within the existing Chorley settlement boundary. With the adjacent land going for housing development this site may be more commercially attractive for residential than for employment uses. Also there are a number of potential environmental constraints associated with this site which could impact on the nature and scale of employment development able to be accommodated (discussed below).

Environmental Sustainability and Strategic Planning

- 5.45 There are TPOs on this site and the site is close to the Green Belt, Valley Park and a Biological Heritage Site. A high standard of design and landscaping should be provided to maintain and enhance the site's current contribution to local environmental quality. The site is located in an area of moderate economic activity and in an area ranked in the most affluent wards for multiple deprivation. Overall, the environmental sustainability and strategic planning score is moderate.

Role within Employment Hierarchy

- 5.46 The site is ranked as 'Good Urban'.

Southport Road

- 5.47 This is a Greenfield site of 2.25 hectares and is in single ownership by Lancashire County Council. The site has very good main road frontage. It is allocated in the Local Plan for business/industrial use (classes B1 and A2) and also for Further Higher Education facilities. Part of the site is also identified as a Biological Heritage Site. The site is adjacent to Lancashire College, a cemetery and also open space.

Commercial (Market Attractiveness)

- 5.48 The site scores well in terms of accessibility indicators being situated on the A581 and approximately 5 minutes drive from junction 8 of the M61. Its location means it is easily accessible by public transport despite being outside Chorley Town Centre. It is likely to be a commercially attractive site appearing uncontaminated, flat, of medium size and regular in shape and without flood risk. There is however no evidence marketing currently on site and it has remained allocated but undeveloped for a number of years.

Environmental Sustainability and Strategic Planning

- 5.49 This Greenfield site contains a mature boundary hedge along the street and mature trees and other vegetation through the site. There is ecological value in their retention, particularly of the woodland area in the south of the site.
- 5.50 Given the sites visible location is has the potential to be developed with high quality modern and purpose built buildings which could contribute to the appearance of the street scene and to economic development / regeneration aspirations for the area.

Role within Employment Hierarchy

5.51 The site is ranked as 'Other Urban'.

Ackhurst/ Common Bank Employment Area

5.52 The irregular shaped 16.2 hectares Ackhurst Park Employment Area/ Common Bank Employment Area includes a vacant area of 1.1 hectares in the north of the site, referred to as 'Plot B' and allocated for B1, B2 and B8 uses. In addition, a further site of 0.74 hectares has extant planning permission for B1 office development.

5.53 This industrial area site contains a mix of period warehouse buildings and newer warehouse style buildings. The undeveloped site is to the north of this employment area and the area with planning permission for B1 uses is in the centre of the site. The site has good main road frontage but is well screened.

Commercial (Market Attractiveness)

5.54 This site is generally not well maintained, including the new warehouses within the rear part of the site where landscaping is not well maintained. The being said, the estate appears generally well occupied and popular, and with good levels of parking provision. The site is easily accessible by foot, car, and by bike (although cycle routes within the site are discontinuous) but is not well connected to public transport.

Environmental Sustainability and Strategic Planning

5.55 The site is bounded on three sides by Valley Park, Green Belt and a Biological Heritage Site designation (although the site itself appears to be of generally low environmental sensitivity). On the remaining side is other similar employment uses. The remaining underdeveloped parts of the site would be suitable for further B Class employment development.

Role within Employment Hierarchy

5.56 The site is ranked as 'Good Urban'.

Brook Mill, Adlington

5.57 This small site (0.44ha) contains a mix of old brick mill buildings with poor quality out-buildings which appear to be to be only partially used. The site is generally surrounded by residential buildings. The site is allocated in the Adopted Local Plan as an employment redevelopment site (EM8.3) for B2 and B8.

Commercial (Market Attractiveness)

5.58 The site is likely to offer limited commercial attractiveness. Site visibility from surrounding roads is restricted as is the junction visibility from the narrow access/ egress points onto Brook Street. The site is irregular in shape and sloping down to the adjoining Eller Brook. Redevelopment proposals would also require land assembly (the site is in private mixed ownership) and site clearance, including addressing likely contamination from previous site users.

Environmental Sustainability and Strategic Planning

5.59 The redevelopment of this poor quality site would be of significant visual benefit locally. The site is also in reasonable proximity to Adlington Railway Station. There are mature trees and vegetation on the edges of the site which would likely need to be retained is possible in any redevelopment.

Role within Employment Hierarchy

- 5.60 The site is ranked as 'Other'. Consideration may need to be given to the relocation of existing occupiers displaced by any redevelopment proposals.

Cowling Mill

- 5.61 The Cowling Mill site contains an attractive period mill building of brick construction and a series of outbuildings which appear in poor condition. Uses on this 2.4 hectares site are mainly car related and many of the units are vacant. The site is allocated in the adopted Local Plan for employment redevelopment (Classes B1, B2 and B8).

Commercial (Market Attractiveness)

- 5.62 This site scores quite poorly in terms of its current business image. Local roads are relatively wide and not heavily congested and the site is near to the A6. However, access into the site needs improvement and internal roads are very poor. Redevelopment proposals will require site clearance and probable remediation to deal with existing contamination. The site is also at medium to high (Category 2 and 3) flood risk.
- 5.63 There is some limited evidence of marketing on site. The site is in single ownership but the owner is known to aspire to develop the site for housing. There is a site suggestion for this site for housing.

Environmental Sustainability and Strategic Planning

- 5.64 Adjacent to the site is protected park/ recreational open space and residential. Redevelopment of the site would significantly enhance its current contribution to the local environmental quality. This could be achieved by replacing some parts of the site with higher quality employment buildings and reusing the mill building. The site is within an area of high deprivation therefore its redevelopment could potentially have local economic benefit.

Role within Employment Hierarchy

- 5.65 The site is ranked as 'Other Urban'. Consideration may need to be given to the relocation of existing occupiers displaced by any redevelopment proposals.

Martindales Depot

- 5.65 This 4 hectares brownfield site contains vacant land (to the north), a poor condition mill building, several newer additional concrete block buildings (occupied by a timber and wood merchants and several auto related small businesses). The site is bounded by other employment uses, the Leeds and Liverpool Canal and Cowling Brow.
- 5.66 The site is allocated in the Adopted Local Plan for employment redevelopment (Classes B2 and B8).

Commercial (Market Attractiveness)

- 5.67 The site scores relatively poorly in terms of market attractiveness, affected by the limited availability of road frontage, congested access caused by parked cars, site topography and a possible need for land assembly and also clearance of existing buildings pursuant to any redevelopment proposals (with a likelihood of contamination).

Environmental Sustainability and Strategic Planning

- 5.68 An environmental improvement corridor bounds the site to the east and the site is within 100 metres of protected allotments and open space. The site is adjacent to the Leeds and Liverpool canal; however, it is not in an identified flood risk area. A protected cycle route runs along the eastern edge of the site and there area adequate footpaths into the site. The sites scores well on its ability to enhance environmental quality through the redevelopment of this previously developed site.

Role within Employment Hierarchy

- 5.69 The site is ranked as 'Other Urban'. Consideration may need to be given to the relocation of existing occupiers displaced by any redevelopment proposals.

Group 1 Buckshaw

- 5.70 The Group 1, Buckshaw site amounts to 50.6 hectares of land and is the last remaining parcel of the former Royal Ordnance site , Euxton which will be redeveloped. The site is owned by BAE Systems. The majority of the site will be developed for housing (circa 900 units) although part of the site is covered by a Biological Heritage Site and includes ancient Woodland. 5.4 hectares is proposed for B1 and B2 uses. A masterplan is being prepared and a planning application will be submitted in summer 2008. Development is proposed to take place during 2011-2016.

- 5.71 There is currently a site suggestion for this site for housing and leisure.

Commercial (Market Attractiveness)

- 5.72 The site is attractive in market terms adjacent to the newly constructed Central Avenue. The site is adjacent to a railway line and will benefit from the nearby newly proposed railway station. Subject to the removal of existing buildings and site preparation works, the site presents no obvious constraints being large in size, regular in shape and relatively flat.

Environmental Sustainability and Strategic Planning

- 5.73 The site is free from all environmental and heritage designations, and there is no flood risk on site. The site is in need of remediation. The site forms part of a wider regeneration opportunity being developed and is on a bus route. Major public transport improvements are also proposed as part of the wider delivery of the Regional Investment Site (discussed in subsequent paragraphs). The development of this site would contribute to the broader regeneration aspirations of the area. Overall the site scores reasonable well against sustainability and environmental considerations despite it's out of centre location.

Role within Employment Hierarchy

- 5.74 The site is ranked as 'Good Urban'. With remediation and transport connections as part of the broader regeneration strategy this site has the potential to be 'Best Urban'.

Southern Commercial/ Buckshaw Village (Central Business Area)

- 5.75 Part of the broader Urban Village at Euxton allocation in the Chorley Local Plan, 17.95 hectares of this large Brownfield site remains without planning permission. Planning permission exists on almost 5 hectares of the site for 18,760 sq m of B1 – B8 employment development. As part of former Royal Ordnance Factory, significant remediation work has already been completed on this now cleared site as part of the 1998/1999 approval for

the remediation and redevelopment of 170 hectares also including land in South Ribble. The site is part of the Buckshaw Village Land Use Plan. This masterplan envisages business use (B1, B2 and B8) on the site over a number of plots and a mixed use area to include a primary school and a health centre subject to a separate design code and masterplan document.

Commercial (Market Attractiveness)

- 5.76 The site scores well on market attractiveness criteria. The site has clearly been remediated and is flat, large in size and regular in shape. On the site visit carried out there was clear evidence that the site was being marketed. The site has high visibility to local roads. Access is excellent to the site and visibility is good. The site owners are Barratt (Manchester) Plc who have aspirations to bring the site forward for development in line with the Land Use Plan

Environmental Sustainability and Strategic Planning

- 5.77 The site is previously developed and has low environmental sensitivity. It has little or no 'bad' neighbouring uses (Greenfield and other employment uses) but has some potentially sensitive uses nearby (residential uses). Despite the site's location outside of Chorley Town centre it is within a larger regeneration scheme and is well connected by transport routes and has good cycle and footpath routes near to the site. A rail and bus based park and ride site adjacent to this site on its southern edge and re-opening / refurbishment of the rail station is proposed for completion in March 2009 and further enhance sustainability credentials.
- 5.78 The development of this site would significantly contribute to the broader regeneration aspirations for the area in local and regional policy.

Role within Employment Hierarchy

- 5.79 The site is ranked as 'Best Urban'.

Regional Investment Site, Buckshaw

- 5.80 Part of the former Royal Ordnance Factory off Euxton Lane, this site is allocated as a Regional Investment Site in the adopted Local Plan Review (Policy EM1A) and referred to in adopted Regional Planning Guidance. The site has been cleared and remediated. The site overlaps with the urban village planning permission area by about 5.1 hectares. The area of this site is 19.5 hectares and includes 6.6 hectares of constructed employment development. Units 5/7 and 9 have outline permission for B2 employment uses comprising 49,700 sqm (535,000sqft). This leaves 3.65 hectares which according to Council records is covered is landscaping and therefore not available for further development.

Commercial (Market Attractiveness)

- 5.81 The site scores well in commercial attractiveness terms. Buildings which are completed are modern and of a high quality. Access to the various parts of the site is excellent with purpose built new roads. The site adjoins other employment uses and Greenfield land and has excellent local road frontage. The site is large regular and flat. Owners of the site Helios Slough are known to have aspirations for its development for employment use.

Environmental Sustainability and Strategic Planning

- 5.82 The site is free from environmental and heritage designations and has appropriate neighbouring uses for employment development. The site is outside of Chorley Town Centre but is part of a large regeneration scheme

with sustainability aspirations, is well served by public transport networks and has good footpaths and cycle links.

5.83 Despite the site's location outside of Chorley Town centre it is within a larger regeneration scheme and is well connected by transport routes and has good cycle and footpath routes near to the site. A rail and bus based park and ride site adjacent to this site on its southern edge and re-opening / refurbishment of the rail station is proposed for completion in March 2009 and further enhance sustainability credentials.

5.84 The further development of this site would continue to significantly contribute to the broader regeneration aspirations for the area in local and regional policy.

Role within Employment Hierarchy

5.85 The site is ranked as 'Best Urban'.

Stump Lane

5.86 This relatively small 1.4 hectares site is located close to Chorley Town Centre sandwiched between two other sites considered as part of this study – the Gas Works at Bengal Street and the Briercliffe Road Site. A railway line and embankment runs down the western boundary of the site. The site is allocated for B1 and B2 uses in the adopted Local Plan and is not currently utilised. There is a current planning permission on the site for 3 industrial units with parking and ancillary facilities (0.98 hectares), 0.16 hectares remains without planning permission.

Commercial (Market Attractiveness)

5.87 The site is regular in shape but fairly narrow. It is owned by Primrose Holdings. A new access is being constructed onto Stump Lane.

Environmental Sustainability and Strategic Planning

5.88 The central location of this site close to Chorley Town Centre makes a positive contribution towards its sustainability credentials, particularly given its proximity to a public transport interchange. There are no flood risk issues, TPOs, environmental or heritage designations on the site. The site is located in an area of moderate economic activity (58.1 - 67.7%) and has the ability to deliver certain (local) economic policy objectives.

Role within Employment Hierarchy

5.89 The site is ranked as 'Good Urban'.

Crosse Hall Street, including Weir Mill

5.90 This site is 2.37 hectares in size. The site includes the Weir Mill building located in the northern part and which is accessed separately (via Crossmill Lane). A number of other businesses occupy the main employment area of the site (accessed via Crosse Hall Street) including joiners and several sheet metal companies housed in modern warehouse buildings. The site is relatively well maintained. Only 0.21 hectares of the site is identified as being available for development and is allocated in the Local Plan for B1, B2 and B8 uses.

Commercial (Market Attractiveness)

5.91 The site is occupied by modern buildings which are adequately maintained. The area which is undeveloped is relatively small and triangular in shape. It would be suitable for expansion of an existing business.

5.92 Access into the site via Crosse Hall Street is narrow and complicated with a busy street frontage which makes turning into the site difficult during peak periods. The site is owned by a single owner but their aspirations are unknown. Neither access to the site has good road frontage making it less attractive commercially.

Environmental Sustainability and Strategic Planning

5.93 The site adjoins some amenity open space, however, but is itself free from environmental and heritage designations. Given the limited amount of vacant land at the site, the potential to enhance the quantity of employment floorspace on site, and hence, contribute towards economic objectives, is not significant however.

Role within Employment Hierarchy

5.94 The site is ranked as 'Other Urban'.

Chorley East

5.95 None.

Chorley West

Rear of New Street, Mawdesley

5.96 This 1.64 hectares site is partly occupied by modern well maintained buildings. The largest occupiers on the site are Rufford Printing Co and a furniture showroom (Cane Capital). 0.6 hectares of this site is identified in the adopted Local Plan Review for B1 use. This part of the site is mainly flat and undeveloped but does also include a scrap yard. This area is screened off by a large fence from the well maintained developed majority of the site.

Commercial (Market Attractiveness)

5.97 The commercial attractiveness of this site is affected by its location behind residential properties and streets. It has no visible street frontage and access into the site is narrow. This being said, the existing employment uses in this location appear to be functioning well and the development of further employment uses on the remaining 0.6 hectares may be brought forward for smaller / local occupiers.

Environmental Sustainability and Strategic Planning

5.98 The site is within a 2 / 3 category flood plain which may affect development potential. The site itself is of low sensitivity, with no other environmental policy constraints on the site or surrounding area. Additional employment development over the available part of the site could deliver local policy objectives.

Role within Employment Hierarchy

5.99 This site is ranked as 'Other Urban'.

Preston

City Centre

5.100 None.

Inner Area

Ringway/ Falkland Street

5.101 The irregularly shaped site edge of Preston City Centre and is partly occupied by an older building used as a karate studio. The area around the building is used as a car park and the remainder is overgrown in

vegetation. It is allocated for B1 development under Policy W1 of the adopted Local Plan.

- 5.102 Surrounding the site are other employment buildings, generally of poor quality but in a central location close to the City's amenities and public transport interchange. Along its western boundary is the main railway line. The northern and eastern boundaries front on to the road network.

Commercial (Market Attractiveness)

- 5.103 Despite the site's excellent links to major road networks within Preston (e.g. the A59), the quality of immediate access is poor, with access required from Corporation Street. Additionally, the site is in part screened from main roads but does have a large degree of frontage to the road network and railway. The site's irregular shape is likely to affect the most efficient use of land.

- 5.104 The site is surrounded by other employment uses and has a limited number of environmental constraints. It is likely to have some contamination and has a low risk of flooding. It is understood that (the majority of) the site is owned by Network Rail. Under Site suggestions, the site has been put forward for mixed use (residential, retail and office development). Whilst the existing building portfolio is poor and appears not to be marketed, its location close to Preston's services and facilities makes it an reasonably attractive opportunity for redevelopment, as reflected in the extant planning permission for the site. The site represents an opportunity to deliver good quality office stock within Preston City Centre.

Environmental Sustainability and Strategic Planning

- 5.105 The site achieves a good score against sustainability and strategic planning indicators due to its previously developed land status, location close to Preston City Centre and major nearby transport interchanges. In addition, the site has good potential to address issues of low economic activity and high deprivation within this area, and to also enhance environmental quality.

Role within Employment Hierarchy

- 5.106 The site is ranked as 'Good Urban'.

Deepdale Street/ Fletcher Road

- 5.107 This is an established employment site with an area of 1.24 hectares of land within the south-western portion (along Fletcher Road) remaining vacant. The site contains a wide mix of employment uses including older factory buildings and more modern warehouse buildings. Generally however, the site is in poor maintenance and is discordant. It is surrounded by residential dwellings to the north, east and west, and employment occupiers (including what appear to be World War II buildings) to the south.

- 5.108 Despite its unattractive appearance, the site has high occupancy with only a small number of existing buildings marketed and vacant.

Commercial (Market Attractiveness)

- 5.109 The owner of the site is unknown. Whilst the site is close to major road networks, the quality of local roads and the internal estate roads are narrow and of poor quality. Access and egress are not clear and the internal road network is complicated.

- 5.110 Nearby residential dwellings will influence the type of employment uses that would likely be acceptable in this location. Contamination from previous

uses may exist. The vacant part of the site does not have planning permission and does not appear to be actively marketed.

Environmental Sustainability and Strategic Planning

- 5.111 The site is previously developed land within easy walking distance to good public transport and in close proximity to Preston's services and facilities. There is significant scope to enhance the site's environmental quality by redeveloping some parts of the site with better quality employment buildings.
- 5.112 In addition, the site achieves a high score in terms of economic priorities as development and redevelopment of the site is likely to increase economic activity and also reduce high multiple deprivation indicators in the area.

Role within Employment Hierarchy

- 5.113 The site is ranked as 'Good Urban'.

Western Suburbs

Preston Riversway (excluding Phase B Land)

- 5.114 Preston Riversway is a large established employment site of over 38 hectares. It contains a wide range of employment uses including Sui Generis Bulky Goods Retail, B1 Office, B1 Light Industry, B2 Manufacturing and B8 Warehousing and Distribution accessed via a good quality internal road network.
- 5.115 Preston Riversway adjoins a large predominantly undeveloped site to the West, known as Preston Riversway Phase B. The site is separated from residential uses by the River Ribble to the south and by a main arterial route (A583) to the north.
- 5.116 The eastern part of the site contains clusters of fairly modern B1 Office buildings. Within its southern boundary, the site is occupied by a well utilised marina and moorings. The western part of the site includes large warehouse and distribution buildings whereas the central part of the site contains B2 manufacturing operations.
- 5.117 Whilst large parts of the site appear undeveloped, most of this area is covered in hard standing, providing car parking and open storage for the larger operators within the site. As a result, only two small parts of the site, known as Site 13C and Site D2, are identified with capacity for additional employment use.
- 5.118 Site 13C is a small site of 0.93 hectares which is located within the southern part of the site on the northern bank of the River Ribble. It has recently been committed for a mixed use development comprising residential and office uses.
- 5.119 Site D2 is 0.44 hectares and is located north of Site 13C. It is partially covered in hard standing and does not have planning permission for development.

Commercial (Market Attractiveness)

- 5.120 Preston Riversway has good accessibility, including via the A583. Most of the buildings within the site are purpose built, well maintained and largely occupied. Much of the site is occupied by large businesses, most notably the central and western parts of the site which contain large B2 and B8 operators.

5.121 There are likely to be some site-specific physical constraints including high risk of flooding (category 3) and contamination, which affect the market attractiveness score. For example, the risk of flooding on site is high (category 3a and 3b).

Environmental Sustainability and Strategic Planning

5.122 The site achieves a reasonable score against environmental sustainability factors. It is in an urban area but outside of the defined centre. Rail access is poor but there is some access by bus. The site is classified as previously developed land and has good footpath and cycle links which makes it attractive against this criteria.

5.123 The site has reasonable potential to deliver some strategic economic objectives, but this score is tempered by the scale of opportunity for additional employment development, largely restricted to the small pockets of land currently vacant / not used to their full capacity.

Role within Employment Hierarchy

5.124 The site is ranked as 'Good Urban'.

Eastern Suburbs

Preston East Employment Area

5.125 This is a very large and regularly shaped site. It is predominantly undeveloped but with recent office buildings completed along Bluebell Way. Approximately 16.89 hectares of land remains uncommitted although approximately 35 acres (14.16 hectares) has been acquired from English Partnerships by 'Helios Slough' to develop approximately 700,000 sq ft (65,030 sqm.) of industrial and warehousing floorspace.

5.126 Approximately 53,750 sqm. (18 hectares of land) is committed for B1 office and B8 storage and warehousing uses. This employment area adjoins the motorway and is located within an area generally undergoing major redevelopment for employment use.

Commercial (Market Attractiveness)

5.127 The site adjoins the M6 motorway and is approximately 2 minutes drive from Junction 31A – southbound only. There are good quality local roads leading to the site. It is well connected by good quality roads, cycle routes and some nearby bus routes. The site has a good road frontage onto the motorway and adjoins other similar uses or Greenfield land.

5.128 There is no flood risk on site and it appears that contamination from previous uses has been remediated to an acceptable level. It is likely that the site will continue to a range of business, industrial and warehousing businesses which have occupied the site to date. Significant developer interests and large commitments for employment uses on this site together with the site being put forward for employment development through Site suggestions implies that there is good commercial demand for employment uses in this location.

Environmental Sustainability and Strategic Planning

5.129 It is likely that there were previous uses on this site although site remediation means that the site appears Greenfield. Whilst the site is in an out of town location, it has good cycle and footpath links. However, the out of town location affects its sustainability score, particularly in relation to proximity to a public transport interchange.

5.130 Overall, the score indicates that the site is able to make a large contribution towards certain strategic planning objectives and is likely to attract large inward investors due to its proximity to the motorway. However, a Green Travel Plan (which could include measures such as the provision of a Park and Ride facility linked to the City Centre) could be implemented to improve its sustainability performance.

Role within Employment Hierarchy

5.131 The site is ranked as being within the 'Best Urban' category but to enhance its sustainability credentials, consideration could be given to preparing a Green Travel Plan and Sustainability Strategy for the employment area.

North Preston Employment Area

5.132 This is a large well established employment site of over 53 hectares which provides a range of employment facilities. The site is located on the northern edge of Preston. It is bounded by residential development to the south and east with areas of Greenfield land to the north west. Along the north east boundary, the site adjoins the M6 motorway and Greenfield land.

5.133 The allocated land on this site has now been taken up. The main potential for further development arising from the infilling and intensification of small pockets of land remaining within the established employment area.

Commercial (Market Attractiveness)

5.134 The site achieves a high score against accessibility indicators. It adjoins the motorway (in reasonable proximity to junctions 32 and 31a of the M6 and junction 1 of the M55) and has good quality local road access. The site has a good business image influenced by its generally high quality buildings. The site appears attractive to the market with recently completed units and a generally high level of occupancy.

5.135 The site does not appear to have any major environmental constraints which also assist in the site achieving a good market attractiveness score.

Environmental Sustainability and Strategic Planning

5.136 Despite its previously developed land status, the site achieves a relatively low score against sustainability indicators due to its out of centre urban fringe location with limited access to public transport.

5.137 In terms of its strategic positioning, the site is within an area of fairly high economic growth and affluence. Combined with the limited capacity for additional employment floorspace, this site is unlikely to generate significant improvements to economic development in the area although it currently makes a substantial contribution in this regard.

Role within Employment Hierarchy

5.138 The site is ranked as 'Good Urban'.

Red Scar Site

5.139 Red Scar is a large, regular shaped, flat site in multiple occupancy. It is used for a wide range of employment uses dominated by B1 Light Industrial, B2 Manufacturing and B8 Warehousing and Distribution. In addition, the central part of the site is occupied by a metal recycling facility. 27.16 hectares of the site remains undeveloped of which 22.63 hectares is committed for employment development, divided between 3 main areas focussed within the currently undeveloped south east part of the site.

5.140 The Red Scar site adjoins other employment uses, the open countryside and the M6 motorway to the south west.

Commercial (Market Attractiveness)

5.141 The site has relatively good overall accessibility, in close proximity to the M6 motorway (junction 31A – southbound). It is located within an area generally characterised by industrial development, and close to Millennium City Park which has seen a good level of recent development.

5.142 The scale of the site offers an opportunity to potentially meet a wide range and size of market requirements. However, the poor quality of the existing internal road network and potential for contamination lower the site's overall market attractiveness score.

Environmental Sustainability and Strategic Planning

5.143 The site is previously developed land by virtue of a large part of the site already developed. It is located on the edge of the urban area with average access to public transport and alternative modes of travel. The site has poor quality footpaths and no nearby cycle routes.

5.144 The site represents an opportunity to deliver a wide range of industrial and warehousing development that is located away from residential settlements. It is also in an area of low economic activity where the take up of the remaining 27.16 hectares will play a significant part in improving its score. Preparation of a Green Travel Plan and sustainability plan could be considered to improve its sustainability score of the site and to encourage more sustainable travel.

Role within Employment Hierarchy

5.145 This site is ranked as 'Good Urban'.

Millennium City Park

5.146 This site provides 3.5 hectares of flat and regularly shaped employment land. The Red Scar Site adjoins Millennium City Park to the east. There has been considerable take up of land within Millennium City Park with approximately 8 hectares developed for B1 Office and B1 Industrial uses. The site adjoins the M6 motorway and is surrounded by employment uses and other employment sites. Residential uses are located to the south west of the site but separated from Millennium City Park by the M6 motorway.

Commercial (Market Attractiveness)

5.147 The site has purpose built internal road network and is approximately 3 minutes drive to Junction 31A of the M6 – southbound only. The site has no major environmental constraints. All the buildings within the site provide modern employment facilities. The site has scope for further development on the remainder 3.5 hectares of land which has not yet been committed but has recently been put forward for employment development through site suggestions.

5.148 Recent development on this site provides strong evidence of the market attractiveness of Millennium Park, particularly for office occupiers.

Environmental Sustainability and Strategic Planning

5.149 Whilst Millennium City Park is located on the edge of an urban area, the uses that operate from this site are more suitable such locations, away from sensitive land uses which are separated from this site by the M6 motorway.

5.150 Whilst the site is within 500 metres of a main bus route and provides excellent cycle and footpath route links to the site, its location affects its sustainability score (poorly-moderate). In order to enhance the site's performance against environmental sustainability criteria, consideration could be given to a Green Travel Plan as part of a strategic framework to guide the remainder of the development at the Park.

5.151 Future development of the remainder 3.5 hectares for employment uses will assist in improving the economic activity of the area, although the site is located in an area of moderate / good economic activity and low deprivation.

Role within Employment Hierarchy

5.152 The site is ranked as 'Best Urban'.

Site at Junction 31a (M6) West Loop

5.153 The site adjoins the M6 motorway (junction 31A – southbound) and is surrounded by residential dwellings along its western boundary and the motorway to the east. The site is Greenfield land and is on the edge of an urban area. It has been available for employment use for a number of years however; the entire site of over 5 hectares remains uncommitted. There has been some interest in using the site for Class D2 uses.

Commercial (Market Attractiveness)

5.154 The site does not appear to be significantly constrained by physical factors. Access to the site is excellent. In addition, it adjoins the motorway and is large, flat and regularly shaped without any significant environmental constraints (contamination or risk of flooding). However, it does adjoin residential uses along its western boundary which will influence the type of employment uses that can be provided on this site. It is likely that certain potential occupiers will be more attracted to Millennium City Park due to their greater separation from nearby residential uses and availability of site infrastructure.

5.155 The site is in single ownership and it is understood that the site owner has aspirations to develop the site for employment and / or Class D2 uses in accordance with the Adopted Local Plan.

Environmental Sustainability and Strategic Planning

5.156 The site scores poorly against sustainability considerations as it is entirely Greenfield land and is located in an edge of urban area with average access to public transport and transport interchange. The site is also in an area of high economic activity. In order to enhance the site's score against the sustainability criteria, consideration should be given to preparation of a Green Travel Plan and Sustainability Plan as part of a Strategic Framework to guide future development of this site.

Role within Employment Hierarchy

5.157 The site is ranked as 'Mixed Use' suitable for employment / D2 use.

Roman Way Industrial Estate

5.158 Roman Way is a large and well established employment site on the eastern urban fringe of Preston. It is located within an established employment area which includes South Hey Industrial Estate to its north, Mondiboard Packaging to its west and Greenfield land to the south and east. It is also in the same cluster of large employment sites including Red Scar and Millennium City Park.

5.159 The site contains a wide mix of employment uses, dominated by industrial use. The entire site of 24.675 hectares is fully developed.

Commercial (Market Attractiveness)

5.160 The site achieves a high score against market attractiveness indicators on a number of factors including its proximity to a major arterial route, good quality local road provision, high quality of existing employment building stock, high occupancy, good local road frontage and compatibility with the adjoining land uses. However, the site is unlikely to be able to deliver significant additional employment floorspace due to the current nature and density of development.

Environmental Sustainability and Strategic Planning

5.161 The site scores moderately against the sustainability criteria. Whilst it is not in close proximity to a public transport interchange, the site is accessed via good footpath and cycle links. In terms of strategic and economic development, the site has reached its maximum capacity and growth therefore is unable to contribute further to these indicators beyond its current important role.

Role within Employment Hierarchy

5.162 This site is ranked as 'Good Urban'.

Preston Rural

Land North of Eastway (formerly Broughton Business Park)

5.163 This site is a substantial Greenfield site in excess of 25 hectares set within open countryside. Part of the site is occupied by Grange Farm and is in close proximity to the residential fringe area of Preston. It is a large, regularly shaped plot which contains some mature vegetation and is allocated in the Adopted Local Plan for B1 development.

Commercial (Market Attractiveness)

5.164 The site adjoins the motorway to the north and is accessed from the south by good quality roads. It is approximately 5 minutes drive from the M55 (J1) and the M6 (J32). The site is unlikely to contain any contamination and has a low risk of flooding. It has been allocated for employment development for over 5 years but does not have planning permission. It is understood that the site is owned by English Partnerships but is not currently being actively marketed.

5.165 The allocation is subject to some environmental constraints, with a number of tree clusters and adjoining ponds which may have some ecological value.

5.166 The redevelopment of Whittingham Hospital Complex (north of this site) requires an upgrade of roads including the provision of a link to the Broughton bypass which will dissect this site. Provision of this infrastructure will make the site more attractive and feasible for employment development although delivery of the by-pass is not anticipated until post 2010. Pending completion of the by-pass, the site has the potential to accommodate a range of occupiers.

Environmental Sustainability and Strategic Planning

5.167 The site scores poorly against sustainability considerations because of its semi-rural location and consequent poor access and distance to the town centre / local facilities. It has low potential to reduce car use (although this could be enhanced to a degree through the introduction of a Green Travel

Plan). There is potential ecology issues associated with the development of this site.

- 5.168 Theoretically, the site has good potential to address key strategic planning and economic objectives such as the promotion of Preston for major new development and investment, and ability to accommodate key target sectors. The site's strategic and economic planning score is tempered however due to the timing of the by-pass constraining the current availability of the site.

Role within Employment Hierarchy

- 5.169 The site is ranked as 'Mixed Use' which reflects the potential requirement for a Park and Ride facility over part of the site. Delivery requires completion of the Broughton bypass and give the scale and location of the opportunity, a Green Travel Plan and a Sustainability Plan should be sought. Completion of the bypass should be progressed as a priority to release this site and also the former Whittingham Hospital complex.

Former Whittingham Hospital Complex

- 5.170 This large former Hospital complex in a semi rural setting close to the village of Goosnargh. The complex is almost 60 hectares in size of which only 3.83 hectares is likely to be available for employment use (B1 Office), forming part of a residential-led mixed use scheme for the site being brought forward by Taylor Wimpey, the preferred developer appointed by English Partnerships (the site owners). The complex is committed under Policy DS2 of the Adopted Local Plan for comprehensive mixed-use development.
- 5.171 The site is surrounded by open countryside except for its northern boundary where it adjoins the local village road, opposite which is residential dwellings.
- 5.172 Overall, the site contains a significant number of mature trees, protected by Tree Preservation Orders and period attractive hospital buildings which appear in a poor condition. Part of the site (excluded from the 50+ hectare redevelopment) remains operating as a hospital.

Commercial (Market Attractiveness)

- 5.173 A number of constraints are identified which could limit market interest for certain occupiers. These include generally poor accessibility and visibility from the local road. This being said, the scale of the opportunity and its rural setting provides the potential to create an attractive mixed use development. The Whittingham Hospital site has planning permission for the provision of 9,000 sqm. of B1 office development alongside substantial residential and ancillary uses which will require improvements to local infrastructure, most notably the highway network. In particular, comprehensive development of the site cannot start until construction of the Broughton bypass is commenced from J1 of the M55 to the north of Broughton village. Redevelopment of the hospital complex is therefore not anticipated until early 2010.

Environmental Sustainability and Strategic Planning

- 5.174 The site scores relatively poorly against environmental sustainability considerations. Whilst it is close to a main bus route, there are no existing footpaths or cycle links leading to the site to encourage the use of these modes of travel.

5.175 Despite its previously developed land status, there are a number of significant constraints such as Tree Preservation Orders and ecology issues. However, given the large scale of the site, environmental constraints will unlikely significantly impact on the provision of the scale of employment development currently envisaged.

5.176 The site has some opportunity to deliver strategic and economic benefits to this area but is already ranked amongst the most affluent.

Role within Employment Hierarchy

5.177 The site is defined as 'Mixed Use'. Effective delivery of the site is dependent on strategic access improvements (i.e. a link to the proposed the Broughton bypass). The introduction of a Green Travel Plan and a Sustainability Plan would also enhance the site's sustainability credentials.

South Ribble

Leyland & Farington

Farington Business Park

5.178 Farington Business Park is part of a cluster of established employment sites within the north part of Leyland's built up area. The front part of the site, (along Goldenhill Lane), has been redeveloped and accommodates a supermarket, Arnold Clark car sales and two other bulky retail premises. The rear part of the site contains older office and industrial buildings.

5.179 The site adjoins large established employment sites to the west and north and residential development along the east and south. It is a large flat site within good walking distance to the local train station and other facilities in Leyland.

5.180 Currently, the site does not have any vacant land to accommodate new additional employment development. Conversely, there is an extant planning application to redevelop the rear part of the site for residential use which if permitted would result in the loss of employment floorspace.

Commercial (Market Attractiveness)

5.181 The site is located within close proximity to a major arterial route and is accessed via what appear to be good quality and uncongested roads. The front part of the site presents a positive image and benefits from a good road frontage. This part of the site contains modern, purpose built buildings (predominantly retail and sui generis). Older purpose built manufacturing buildings of poorer quality are located within the rear part of the site. The site appears to be fully occupied.

5.182 It is likely that parts of the site are contaminated and that any redevelopment and renewal of older premises will require remediation. Through the Site suggestions, the site is being promoted for residential development.

Environmental Sustainability and Strategic Planning

5.183 This site scores well against the sustainability indicators. It is within 500 metres walking distance of a transport interchange and has good footpaths leading to the site. However, as the site is fully occupied it cannot deliver further economic growth within the area unless it is redeveloped to provide enhanced B Class employment opportunities.

Role within Employment Hierarchy

5.184 The site is ranked as 'Other Urban'.

Farington Road

- 5.185 This greenfield site of 9.2 hectares is located directly north of the well established Lancashire Business Park. The site is regular in shape and in the same ownership as the northern part of Lancashire Business Park (i.e. Paccar UK).
- 5.186 To the north, east and west, the site is bounded by greenfield land and an established employment site to the south. Along its eastern boundary is the West Coast Main Railway Line which links Leyland and Preston.

Commercial (Market Attractiveness)

- 5.187 The site scores well against accessibility indicators. It adjoins the main arterial route which is a good quality local road. The site is attractive in terms of its size, shape and flat topography but it does have some physical constraints including risk of flooding and it adjoins the Green Belt.
- 5.188 The site has been available for 6-10 years however it does not benefit from any extant planning permissions. It is likely that the site is being reserved for the future growth of Leyland Trucks although we are not aware of any specific development aspirations for the site. Part of the site is identified as having a medium risk of flooding (Category 2).

Environmental Sustainability and Strategic Planning

- 5.189 The site generally scores poorly against environmental sustainability indicators as it is a greenfield site and with poor access to non car transport modes. However, the site has potential to provide additional employment land for Leyland Trucks which could enable an established operator to remain and expand in its current location. If required for this purpose, the land is strategically located to meet this need and deliver long term economic development. Any development however will need to consider implementing a Green Transport Plan and Sustainability Plan.

Role within Employment Hierarchy

- 5.190 The site is ranked as 'Owner Specific'.

Land adjoining Lancashire Business Park

- 5.191 The site is 23.33 hectares of vacant land. It is greenfield in appearance although is heavily contaminated which suggests that the site has a history of employment uses in the past. The site is bounded to the north, west and partly to the south by residential uses. The other neighbours to the east and south are in employment use. There are established footpaths through the site which dissect the site to north and south.
- 5.192 At the time of the site visit, it appeared that ground works were being carried out over parts of the site, seemingly to improve ground conditions and deal with any contamination.

Commercial (Market Attractiveness)

- 5.193 The site adjoins an established employment area in Leyland but has only limited strategic accessibility. The existing environment is fairly attractive open land with mature vegetation and shrubs dispersed in pockets throughout this large site.
- 5.194 The site currently has limited road frontage visibility as it is accessed at the end of a cul-de-sac which also leads to the southern part of Lancashire Business Park. In terms of development constraints, the site has a designated biological heritage area and is subject to medium flood risk in parts and contamination (although it appears that this is being addressed).

However, due to its large size and location adjacent to the established employment area in Leyland, the site is likely to be moderately attractive and capable of accommodating a range of requirements.

The owners, Fact Focus, have aspirations to develop the site for employment use with an element of residential development. However Focus are awaiting for the resolution to the access arrangements for the approved Waste Technology Park.

Environmental Sustainability and Strategic Planning

- 5.195 The site scores moderately against environmental sustainability considerations due to nature and poor quality footpaths and lack of cycle routes. However, given its large size, it is likely that considerable infrastructure improvements could be generated by development of this site including the provision of improved footpaths and cycle routes to enhance its sustainability performance. We would recommend the formulation of a Green Travel Plan and Sustainability Plan to guide the comprehensive development of the site.
- 5.196 The large scale and flexible nature of the site introduces an opportunity to improve the economic and social indicators as the site provides an opportunity to attract a range of occupiers.

Role within Employment Hierarchy

- 5.197 The site is ranked as 'Good Urban'.

Carr Lane

- 5.198 This 6 hectare site is regular in shape and comprises recent modern purpose built industrial buildings over approximately 3.3 hectares. The remainder part of the site is vacant but is committed for employment development under an outline planning permission. A reserved matters application for an industrial building comprising 3,296 sqm. floorspace with associated car parking and landscaping over approximately 0.9 hectares of this vacant remainder was being considered at the time of this study.
- 5.199 The site adjoins the railway line to the east and other employment sites to the north, south and west. Part of the western boundary overlooks residential dwellings which are located on the opposite side of the street.

Commercial (Market Attractiveness)

- 5.200 The local road network is good with wide uncongested roads leading to the site although the site is relatively distant from the strategic road network. The buildings on site are brand new, purpose built industrial units and are well maintained. Industrial units have only recently been completed and most were vacant (and marketed) at the time of the survey.
- 5.201 Whilst the site does not have a main road frontage, it benefits from two local road frontages. In terms of environmental constraints, it is likely that the site was previously contaminated but has been addressed. In addition, part of the site is in a biological heritage area.
- 5.202 Overall, the site delivers a good score against market attractiveness indicators, with demand illustrated by recent development and current (pending) commitments and likely to be attractive towards small to medium industrial occupiers.

Environmental Sustainability and Strategic Planning

- 5.203 The site scores reasonably well against environmental sustainability criteria given its proximity to non car transport modes and its previously developed

land status. The relatively limited scale of opportunity for new development and its location in an area of already high economic activity limits the site's potential to deliver significant economic objectives.

Role within Employment Hierarchy

5.204 The site is ranked as 'Good Urban'.

Land within Lancashire Business Park

5.205 This rectangular plot of land of 3.43 hectares situated within the Lancashire Business Park is covered in hardstanding and informally used for open storage possibly used by Leyland Trucks. This site has been identified as 'available' for a number of years but is not committed for development. It is surrounded by other employment uses including most notably Leyland Trucks which occupies a large (northern) part of the Business Park and Clive Hurst Plant Hire and Lazy Boy.

Commercial (Market Attractiveness)

5.206 The site would appear relatively free from physical constraints, albeit that it would likely require some remediation. The site scores poorly against accessibility due to its distance from major arterial routes and the quality of local, internal roads which is poor and complicated. Whilst Lancashire Business Park is well used, the quality of the older buildings is fairly poor.

5.207 The site is likely to be owned by Leyland Trucks. However, owner aspirations for the site are unknown although the site could be 'Owner Specific' if required by Leyland Trucks for future expansion.

Environmental Sustainability and Strategic Planning

5.208 The site achieves a moderate score in terms of sustainability, primarily due to its distance to a public transport interchange. The site does however have potential to deliver some economic objectives and benefits, particularly if required for an existing significant occupier to expand operations.

Role within Employment Hierarchy

5.209 The site is ranked as 'Good Urban' or 'Owner Specific' if the site comes forward to allow the expansion of existing operators within the Business Park.

West Paddock

5.210 This is a medium size greenfield site owned by South Ribble Borough Council. It is 1.94 hectares and has been available for a number of years with no commitment for development. It is allocated under Adopted Local Plan Policy EMP7 for business use (Class B1) and open space (it is anticipated that approximately 1/3 of the site should be retained for open space).

5.211 The site adjoins the Civic Centre to the east, open space to the north, a pharmacy to the west and residential development to the south, separated by a road from which access to the site can be obtained.

5.212 Currently, the site is attractive greenfield land which appears to be used for casual recreation.

Commercial (Market Attractiveness)

5.213 In addition to policy requirements to set aside part of the site for open space, the site would appear to have some limited physical constraints including an existing copse and a culvert which crosses the site. A local

nature reserve and a wildlife corridor also lies to the north of the site. Whilst the site is not near any arterial routes, the local roads are not congested and are of good quality.

- 5.214 The site has not been marketed although the Council has expressed an aspiration to have the site developed for mixed use and high quality open space. Overall, this relatively flat and greenfield site appears to offer a reasonably attractive market opportunity.

Environmental Sustainability and Strategic Planning

- 5.215 The site scores poorly against environmental sustainability considerations, particularly given its greenfield state and location in an edge of urban setting. However the site performs better in terms of economic regeneration as development of the site could significantly improve the low economic activity and multiple deprivation within this ward.

Role within Employment Hierarchy

The site is ranked as 'Good Urban'.

Lostock Hall, Bamber Bridge and Penwortham

South Rings

- 5.216 This site of approximately 16.2 hectares is located within the southern built up edge of Bamber Bridge. A large part of the site (approximately 11 hectares) has been taken up for purpose built modern buildings including B&Q, Burger King and Express Inn Hotel. Part of this commitment for B1b(offices) is also yet to be implemented. The remaining 5.147 hectares of the site outside of this major part implemented commitment is likely to deliver B1 Office development, of which 0.882 hectares has been committed for office floorspace.

- 5.217 A motorway (M65) borders the site along the south and western boundaries. To the north of the site is a mixed use site accommodating a supermarket, restaurant and a mix of employment uses. To the south and west is a greenfield site, separated from South Rings by a main road. To the east, along Wigan Road is predominantly undeveloped / greenfield land.

- 5.218 The site is regular in shape and flat although it does contain high voltage overhead power lines which present a physical constraint to development.

Commercial (Market Attractiveness)

- 5.219 The vacant part of this site has been available for a number of years but is currently being marketed. To date, a large part of the site has been developed for uses other than B Class employment.

- 5.220 The site has excellent accessibility via major arterial routes (A49 and A6) which adjoin the site. It is also located close to the M6 and M65. In addition, the image of the park is positive as the existing buildings are of modern construction and in good maintenance. No major physical constraints are identified on this site. For these reasons, the site achieves a good market attractiveness score. However, a small woodland in the north eastern quadrant is protected by a Tree Preservation Order and may be of ecology value. Part of the site has recently been put forward through Site suggestions for sui generis and B1, B2 and B8 development.

Environmental Sustainability and Strategic Planning

- 5.221 Whilst the site has access to a bus stop within 500 metres. Bamber Bridge and Lostock Hall railway stations are also within reasonable proximity

although there is no nearby major public transport interchange. Overall the site scores reasonably well against environmental sustainability and strategic planning criteria, providing good potential to provide economic benefits but balanced with the greenfield appearance and out of centre location.

Role within Employment Hierarchy

- 5.222 The site is ranked as 'Good Urban'.
- 5.223 Given the market attractiveness of the site to non-B Class employment uses, it will be important that remaining land is safeguarded for appropriate employment use. A Green Travel Plan and Sustainability Plan should also be considered to guide the development of the remainder of the site.

Kellet Lane, Bamber Bridge

- 5.224 The site is predominantly greenfield land occupied partly by Seed Lee Farm. It is steeply sloping in part and adjoins the motorway to the south and east, employment uses to the west (Sceptre Point Business Park), and residential uses to the north. The site is irregular in shape. Approximately 0.51 hectares of the total 4.93 hectares has been committed for employment use (B1 Office). Current access to the site is limited via a narrow country lane to the north and a wider local road adjacent to the motorway along the south.
- 5.225 The site is allocated under Adopted Local Plan with a view to creating a prestigious gateway to Walton Summit to promote business image and investment confidence in South Ribble.

Commercial (Market Attractiveness)

- 5.226 The site adjoins the M61 motorway in a visually prominent position. The quality of local road access could however limit development capacity and potential.
- 5.227 Whilst there is no on-site evidence that the site is currently being marketed, the adjacent modern office employment site (to the west) is fully occupied. It is likely that this site will be most suitable for B Class offices and other appropriate high quality employment uses to capitalise on the site's position.

Environmental Sustainability and Strategic Planning

- 5.228 The site scores moderately against environmental sustainability considerations, in part due given its greenfield nature and location in an edge of urban / rural setting. Development could however deliver a number of strategic economic benefits.
- 5.229 Given the nature and location of the site, allied to type of likely occupier, consideration should be given to the preparation of a Green Travel Plan and a Sustainability Plan to set the framework for the future development of this site in order to improve its sustainability score.

Role within Employment Hierarchy

- 5.230 The site is ranked as 'Other Urban' Subject to access improvements and the preparation of a Green Travel Plan and Sustainability Plan, the site could be elevated to 'Good Urban'.

Eastern Parishes

- 5.231 None.

Western Parishes

5.232 None.

Other Sites

Chorley

Chorley Central

Friday Street Area

5.233 This site (3.55 hectares) in Chorley Town Centre contains a mix of building types ages and uses generally of very average quality to poor condition, arranged in an ad-hoc fashion. The site adjoins other employment land and the railway.

Commercial (Market Attractiveness)

5.234 The site has a town centre location and adjacency to the railway station which makes it commercially attractive. However, the redevelopment of the site would not be straight forward as the majority of the buildings appear in occupation and the site is likely to be in multiple ownership. The local roads are narrow and congested. The site is not in a flood risk area, although mitigation works could be required as there may be contamination from former uses on the site.

Environmental Sustainability and Strategic Planning

5.235 The site is highly accessible by non car transport modes including public transport, footpaths and cycle routes helping it to score well in sustainability term. Redevelopment of the site has the potential to enhance the environment of this key town centre location and could bring economic benefits to this area ranked as highly deprived on the indices of multiple deprivation.

Role within Employment Hierarchy

5.236 The site is ranked as 'Mixed Use'.

Gas Works, Bengal Street

5.237 This gas works site, including gas holders, associated brick buildings and hard standings presents a poor appearance and aggressive perimeter in this key town centre location. This site of 0.95 hectares is adjacent to the Stump Lane site (site 16).

Commercial (Market Attractiveness)

This site scores moderately in terms of market attractiveness. It is centrally located, local roads are wide and uncongested and access is good. The site adjoins commercial uses and the railway to the rear and has good main road frontage. The site is regular, flat but fairly small in size. There is no flood risk on this site but significant remediation work is likely to be required given its use for gas works. There is some evidence of limited marketing on site. The site owners are National Grid.

Environmental Sustainability and Strategic Planning

This site scores well in environmental sustainability and planning terms. There is a bus route along Bengal Street and the site is within easy walking distance of the railway station and has safe pedestrian access over the railway line.

This site represents an opportunity to make better use of a currently unattractive urban previously developed site

Role within Employment Hierarchy

5.238 The site is ranked as 'Other Urban'.

Common Bank Bleach Works

5.239 This site of just under 3ha was formerly a bleach works but has now been cleared. The site has been vacant for over 20 years. It is within the built up area of Chorley and adjoins Yarrow Valley Park but is not specifically allocated for development in the Adopted Local Plan. There is a 1999 consent for Certificate of Lawfulness for B2 use on this site.

Commercial (Market Attractiveness)

5.240 The site generally scores poorly in terms of market attractiveness. Access to the site is via a narrow lane and the site is 1 – 2 miles from a major road. Additionally, access to Foxhole Road will require upgrading. The site not being actively marketed and is not visible from any road frontage. The site has a number of development constraints being partly affected by a flood plain (River Yarrow), irregular in shape and sloping. Buildings have been demolished and cleared although there could still be potential for (substantial) contamination given the former Bleach Works use.

Environmental Sustainability and Strategic Planning

5.241 The site performs moderately in terms of environmental sustainability and strategic planning. It is designated as a priority urban fringe area and adjoins Green Belt and the Yarrow Valley Park. Appropriate site screening and landscaping will therefore be required but development could enhance to site's current contribution to local environmental quality. Development would also result in the re-use of a previously developed site.

5.242 Sequentially however the site is located out of an existing centre (but is within an urban area). It is also relatively remote from public transport facilities.

Role within Employment Hierarchy

5.243 The site is ranked as 'Other Urban'.

William Lawrence Site, Townley Street

5.244 This 1.32 hectares site contains a mixture of period mill buildings of brick construction and also more modern buildings.

Commercial (Market Attractiveness)

5.245 The current occupiers and owners William Lawrence produce specialist yarns and have approached the council about relocating from the site. There has been some limited marketing through local agents. The site scores moderately in terms of accessibility with fairly narrow local roads into the site which do not appear to be overly congested. The site is less than one mile from a major road (the A6). There are no obvious environmental policy constraints on this site although redevelopment proposals would likely need to deal with contamination from industrial uses.

Environmental Sustainability and Strategic Planning

5.246 The site is easily accessible by non car modes of transport being within 500 metres of the Chorley Train station. There is also a bus route nearby and good local footpaths although no cycle routes. This brownfield site appears underutilised and presents an excellent opportunity to regenerate buildings

and increase the intensity and capacity on site. Given the sites location adjoining the town centre and its location within a ward ranked highly deprived and of moderate economic activity this site has the ability to delivery sustainable economic development objectives.

Role within Employment Hierarchy

5.247 The site is ranked as 'Other Urban'.

Coppull Enterprise Centre, Mill Lane

5.248 This 3.35 hectares site contains a highly attractive listed former mill building which is used as the Coppull Enterprise Centre. There is also a large area of hard standing and open space within the site boundary to the west of the centre.

Commercial (Market Attractiveness)

5.249 The enterprise centre appears to be popular and well occupied, providing small business space. The mill building is visually attractive. The large car park/ hard standing to the west is poorly surfaced and there may be potential to accommodate additional employment development. The site only has limited visibility to a local road. It is understood that European Settlements, who own and manage the site, have previously expressed a desire for residential development.

5.250 The site scores quite well in accessibility terms access being from a local residential road. The site is within a mile of the A49. The site has few development constraints, being a flat, a regular shape and medium in size. There is no flood risk on this site. Any further development would need to respect the setting of the listed mill building.

Environmental Sustainability and Strategic Planning

5.251 The site adjoins the Green Belt. A bus operates within 500 metres of the site and the site is also within 500 metres of the proposed local railway station of Coppull.

5.252 The Coppull Enterprise Centre appears to be functioning well. There may be potential to increase the intensity of use by providing further employment to the west of the former mill on the underutilised part of the site. However, the setting of the Listed Building would need to be fully taken into account as part of any development proposals.

Role within Employment Hierarchy

The site scores 'Good Urban'.

Radburn Works, Sandy Lane

5.253 This 2.95 hectares site was formerly owned and used by Tarmac as a concrete block / aggregates site. Operations have now ceased and the site has been sold to Harrow Estates. The site is mainly occupied by hardstanding which is used for open storage. There is also a small office building. There are noise and dust issues associated with the site's current use. The site can currently only be accessed via the adjacent pub car park.

5.254 Two site suggestions have been submitted for this site, one for housing and one for community uses.

Commercial (Market Attractiveness)

5.255 It is understood that Tarmac has expressed a desire to vacate the site.

5.256 The development potential and market attractiveness of this site is seriously hampered by access issues. The site fronts a busy local road

Sandy Lane but there is no direct access from this road. Site access through the adjacent pub car park is potentially very difficult for larger industrial vehicles. The site is unallocated and is adjacent to protected amenity space, residential uses and a public house. Ground preparation works will likely be required given the site's use. Overall, the site achieves a relatively low market attractiveness score.

Environmental Sustainability and Strategic Planning

- 5.257 The site scores better in terms of strategic planning and sustainability criteria. The site is on a bus route and there is a footpath along the local road which fronts the site. This brownfield site could be used more intensively than currently and development could enhance the site's current contribution to local townscape quality and economic development objectives.

Role within Employment Hierarchy

The site is ranked as 'Mixed Use'.

Chorley East

Abbey Village Mill

- 5.258 This former mill site is partially used by a furniture manufacturer and a fireplace manufacturer. The total site is just less than 3 hectares in area and also includes greenfield land to the rear of the former mill building. Development of this land may be problematic given its location within a conservation area designation.

Commercial (Market Attractiveness)

- 5.259 Access to Abbey Mill is via a narrow poorly surfaced street (Garden Street) which adjoins a busy 'A' road. The Mill is in the heart of Abbey Village but has very limited local road frontage. Adjoining land uses include residential and Green Belt land. It is understood that there has been significant interest in this site for residential redevelopment. It is also understood that the site currently has five owners which could present land assembly issues.

Environmental Sustainability and Strategic Planning

- 5.260 Abbey Mill is outside of a defined urban area. The site is on a bus route and there is some local footpath provision to access the site by means other than a car. The restoration of the building and the improvement of the road surface on the local road to the site would significantly improve the local environment and preserve an historically important and attractive building.

Role within Employment Hierarchy

- 5.261 The site is ranked as 'Mixed Use'.

Withnell Fold Mill

- 5.262 Withnell Fold Mill is a 1.6 hectare site in poor condition within a conservation area. The former mill building is partially occupied by small workshops. There has been a site suggestion made for this site for housing and employment.

Commercial (Market Attractiveness)

- 5.263 The site is accessed via a very attractive but long and windy cobbled lane. Adjoining land uses are open countryside and residential. The site slopes

steeply presenting a physical development constraint. Site access is very difficult with ad hoc parking and poor turning facilities. Primrose Holdings own the majority of the site but not the landmark chimney. There have been discussions over recent years between the site owners and the Council as to the future of this site and feasibility studies for redevelopment.

Environmental Sustainability and Strategic Planning

- 5.264 Accessibility by non car modes of transport to the Withnell Fold Mill site is poor. There is significant potential to enhance the environmental quality through the adaptive reuse of this building / appropriate redevelopment.

Role within Employment Hierarchy

- 5.265 The site is ranked as 'Mixed Use'.

Chorley West

Twin Lakes Industrial Estate

- 5.266 The Twin Lakes industrial estate has a vacant area of 1.9 hectares. This area does have planning permission (but has not been developed to date) and forms part of the larger site at Twin Lakes covered by permission for 27 industrial units which was for 3.5ha. This site is within the Green Belt but is allocated in the Adopted Local Plan Review as a Major Developed Site where the reuse, infilling or redevelopment of major development sites will be permitted provided that the number of criteria are met. Steel fabrication and concrete manufacturing are the main uses on the developed part of the industrial estate and buildings appear in a poor condition. The site is adjacent to the Preston/ Ormskirk railway line.

Commercial (Market Attractiveness)

- 5.267 The site is irregularly shaped, large and generally flat apart from some fill areas. The site has some visibility to a local road (Brickroft Lane) and within walking distance of Croston railway station but is remote from the strategic road network. The internal road network is of an adequate quality although road surfacing is poor. There is reasonable on site parking and circulation. The site is in single ownership and there are aspirations to further develop the site for employment purposes.

Environmental Sustainability and Strategic Planning

- 5.268 The sites location within the Greenbelt outside of a defined urban area reduces the site's environmental sustainability score. The appearance of the site is currently extremely poor. Therefore any improvements would likely be of local environmental benefit as well as contribute towards local economic objectives.

Role within Employment Hierarchy

- 5.269 The site is ranked as 'Other Urban'.

Preston

Preston City Centre

Avenham Street

- 5.270 This 1.75 hectare site is a fairly regular shape and currently contains a car park and a number of older employment buildings. The site is within the Preston urban area and is surrounded by a wide mix of uses including residential, commercial and employment in a mix of building styles including modern (post 1960s) buildings and period red brick buildings.

5.271 A 2006 planning application was granted permission for 210 apartments and B1 office floorspace of 2,955 sqm. in the car park. This planning permission has not yet been implemented.

Commercial (Market Attractiveness)

5.272 The site scores moderately / poorly in terms of market attractiveness. This is in part due to the poor building stock within and surrounding the site which affects business image. In addition, the quality of local roads and site access are poor with the narrow highway network providing difficult access and often poor visibility into the site.

5.273 The site may have contamination from previous uses. It is currently not marketed and owner aspirations are unknown. Other constraints, such as conservation issues and the existence of sub-stations on the site, may also limit market attractiveness.

Environmental Sustainability and Strategic Planning

5.274 The site achieves a high score in terms of sustainability and strategic planning indicators. The site is previously developed land in a location close to a public transport interchange and within the edge of Preston City Centre. Whilst the site has not been committed, it is likely to attract redevelopment for a mix of uses that would be compatible with the adopted Local Plan. It would be preferable that any future redevelopment of this site introduces an element of B1 Office as well as non employment uses, in line with recent nearby developments and Policy SS5 of the Adopted Local Plan.

5.275 Redevelopment of this site is likely to contribute to economic development in an area where multiple deprivation indices are highest and economic activity lowest (although redevelopment proposals would displace existing occupiers).

Role within Employment Hierarchy

5.276 The site is ranked as 'Mixed Use'.

Shepherd Street & Oakham Court/Laurel Street

5.277 These two adjacent sites occupy a total area of just below 2 hectares. They are situated within the eastern edge of Preston City Centre and contain a mix of buildings used for a wide range of uses including employment (B1 Offices and B1 light Industrial), car park and workshops, providing start up, low cost accommodation.

5.278 The sites are surrounded by similar uses with small pockets of residential development to the south and west.

Commercial (Market Attractiveness)

5.279 The sites achieve a reasonable score in terms of market attractiveness. Both sites are in close proximity to an arterial route. Whilst local road quality and the quality of buildings on site are generally poor, the site appears to have a high rate of occupancy. Relocating existing occupiers could be a constraining factor associated with any redevelopment proposals. Site owner aspirations are unknown.

5.280 There is no risk of flooding and potential for significant contamination is low. The site is a good regular shape and size for an inner urban city site with no major disturbance in the topography.

Environmental Sustainability and Strategic Planning

5.281 The site achieves a good score against sustainability and strategic planning criteria, influenced by its proximity to a public transport interchange, previously developed land status and edge of city centre location. Regeneration of this site will have a significant positive impact on the development of the area.

5.282 On the basis that the local road network is narrow, the redevelopment of this site is likely to attract a very small number of light industrial/workshop uses but would be more suitable for B1 Office with potentially a mix of other employment and non-employment development.

Role within Employment Hierarchy

5.283 The site is ranked as 'Other Urban'.

Walker Street/ Great Shaw Street

5.284 This site is just below 1 hectare and gently inclines from north to south. It is generally unattractive with a discordant group of buildings of various architectural periods occupying the site, used as bulky goods retail (hospice furniture shop), car servicing facility and student accommodation. The site is surrounded by a mix of uses including modern purpose built student accommodation east of the site.

5.285 The site appears to be fully occupied and has no capacity to provide additional development (unless considering redevelopment).

Commercial (Market Attractiveness)

5.286 The site scores moderately against market attractiveness. It is in close proximity to a major arterial route (A583). Local roads appear busy but not significantly congested. The quality of existing building stock is poor and owner aspirations are unknown, which combine to limit the market attractiveness score.

5.287 The site does however have excellent road frontage visibility onto four roads and it is likely that contamination on site can be remediated to accommodate other suitable uses.

Environmental Sustainability and Strategic Planning

5.288 The site achieves a high score against sustainability and strategic planning indicators. The site is within a sustainable location and within 1 kilometre of a public transport interchange. It represents a good regeneration opportunity to provide a vibrant mix of compatible uses including, for example, B1 Office and other compatible uses. Redevelopment of this site would increase economic development and has good potential to reduce multiple deprivation in the area.

Role within Employment Hierarchy

5.289 This site is ranked as 'Other Urban'.

North Road A

5.290 This medium size site of 2.4 hectares is occupied by a mix of businesses, a large number of which are accommodated in offices. Amongst older (generally) unattractive buildings, the site contains a Grade II listed City Church. North Road bisects the site into east and west. The western part contains a vacant plot of land and older commercial buildings. The eastern part contains a mix of circa 1960s business premises.

5.291 The site adjoins residential terraces to the east, an old mill and small employment uses to the north and west of the site and a court house to the south.

Commercial (Market Attractiveness)

5.292 North Road is a major arterial route and the site enjoys very good road frontage. Whilst some of the local roads are narrow and business image is generally poor, the site appears to achieve a high occupancy.

5.293 The Hardwick Street site had planning permission to provide barrister's offices, however, this planning permission has now expired.

Environmental Sustainability and Strategic Planning

5.294 The site scores well against sustainability and strategic planning criteria. It is previously developed land within excellent proximity to a public transport interchange and Preston City Centre's services and facilities. Whilst the site does not have a cycle route, footpaths to the site are continuous.

5.295 Redevelopment/ development of the site represents a good opportunity to address areas of deprivation which currently consist of low economic activity and high multiple deprivation. Development may benefit from making improvements to the local road network. The site is considered to be suitable for a range of employment uses.

Role within Employment Hierarchy

5.296 The site is ranked as 'Other Urban.'

Preston Inner Area

Potential Central Business District

5.297 This is a large site of around 10 hectares generally equating to the potential Central Business District boundary. The site is currently very disjointed and contains a number of distinct segments. Certain streets include attractive period brick buildings, used predominantly as offices and university/educational uses. Buildings within the southern boundary include large bulky goods retail premises. The remainder of the buildings, which front onto secondary streets, are a combination of 1960s and period buildings of simpler form than those along main streets and used for a greater mix of uses including bulky goods retail, small light industrial units, offices and a small residential component.

5.298 The surrounding area is made up of a similar mix of uses and the buildings are of a similar range in quality.

Commercial (Market Attractiveness)

5.299 Overall, the site currently scores moderately against market attractiveness. Despite being in an inner city area, without major environmental designation constraints and in close proximity to major arterial routes with excellent local road frontage, the business image is mixed with buildings off major routes of poorer quality and with narrow access.

5.300 The site does not appear to be marketed and owner aspirations are currently unknown. Whilst the site has major potential due to its large regular size, it is in multiple ownership. Comprehensive delivery of the renewal of the CBD will require comprehensive planning and approach.

Environmental Sustainability and Strategic Planning

5.301 The site achieves a good strategic planning and sustainability score. The site is previously developed land within the inner city area of Preston and

within 500 metres of a public transport interchange. Retaining period attractive buildings as well as introducing modern buildings to replace older buildings would significantly improve environmental quality. In addition, the site presents an opportunity through regeneration and redevelopment to increase economic activity and attract higher value occupiers.

Role within Employment Hierarchy

- 5.302 The site is ranked as 'Mixed Use'. Comprehensive delivery of the renewal of the CBD will require comprehensive planning and a proactive approach and has potential to create a wide range of higher end employment and other uses.

Warehouses, Holme Slack Lane

- 5.303 This is a medium size, flat site of just over 2 hectares which contains two warehouses and adjoining land. The smaller warehouse within the western part of the site is unoccupied whereas the larger building contains some small businesses but is not occupied to its full capacity.
- 5.304 Overall, the site appears scruffy and poorly maintained. It is accessed through a retail park from the south or directly off Holme Slack Lane to the north. The site has recently been committed to provide 2,113 sqm. of employment land and residential bungalows along the northern part of the site.
- 5.305 The site adjoins residential uses to the north and west and a retail park to the east and south.

Commercial (Market Attractiveness)

- 5.306 The existing building stock and business image of the site appears relatively poor. Access to the site by public transport is reasonably good. The local roads are busy but provide reasonable accessibility.
- 5.307 Whilst the owner of the site is unknown, the site has extant planning permission for redevelopment to include a mixture of residential and employment uses. Overall, the site scores moderately in terms of market attractiveness.

Environmental Sustainability and Strategic Planning

- 5.308 The site achieves a slightly better score against sustainability criteria providing previously developed land within the urban area of Preston where redevelopment of the site would significantly improve environmental quality. Additionally, redevelopment of the site can address the low economic activity and high deprivation by introducing good quality employment buildings / more employee intensive users. The environmental sustainability score is affected, however, by the lack of immediate access to a public transport interchange, footpaths and cycle routes.

Role within Employment Hierarchy

- 5.309 The site is ranked as 'Other Urban'.

Preston Western Suburbs

Preston Riversway Phase B

- 5.310 This is a large, uncommitted site with capacity to provide an additional 9.91 hectares of land for employment development. It adjoins the Preston Riversway site to the east and south, a major arterial route to the north (beyond which is a playing field) and greenfield land to the west.

5.311 Whilst a large part of the site is greenfield and allocated in the adopted Local Plan for a Park and Ride facility, the north east quadrant of the site has recently been developed with four car showrooms (Mercedes Benz, Renault, Toyota and Seat).

Commercial (Market Attractiveness)

5.312 The site achieves a good market attractiveness score. It adjoins greenfield land and employment uses and is connected by good quality road networks that do not appear to be congested. The quality of existing building stock is very good and provides a good business image. Whilst the site does not appear to be marketed, it has been available for development for several years. A constraining factor on this site is the location of electricity pylons that cross the eastern part of the site and high risk of flooding (Category 3).

5.313 Given the size of the site and the presence of major automotive showrooms, any future development could attract key target sectors and provide for a range of requirements.

Environmental Sustainability and Strategic Planning

5.314 The site also achieves a reasonable score against sustainability and strategic planning indicators despite its poor access to public transport and greenfield land status. This is in part due to the good quality of local footpaths and cycle routes leading to the site and the potential for development to improve environmental quality. Development of this large site has potential to significantly improve economic activity in the area and its multiple deprivation ranking. In order to improve its sustainability score, development on the remainder of the site should consider implementing a Green Travel Plan and Sustainability Plan.

Role within Employment Hierarchy

5.315 The site is ranked as 'Good Urban'.

Preston Eastern Suburbs

Sharoe Green Hospital

5.316 An ex-hospital site, Sharoe Green Hospital is just over 10 hectares and comprises a Grade II listed administration building set within a deep, formal front garden, also listed. Adjacent to the main building is a group of smaller outbuildings to the rear. The administrative building has been refurbished and is in multiple occupancy as B1 offices. The remaining (retained) buildings are boarded up and the remainder of the hospital site has been cleared for development.

5.317 The site is entirely surrounded by residential uses. Part of the site has been committed for employment land which has been delivered within the main administrative building. The site also has outline planning permission for mixed use development comprising of residential, business uses, sport and health facilities with associated car parking and access.

Commercial (Market Attractiveness)

5.318 The site is reasonably close to a major arterial route (within 1km of the A6) and the local roads are of good quality and do not appear congested. Whilst most of the site has been cleared, the period buildings are attractive and provide a good business image. It is a large regular site which can optimise development. For these reasons, the site achieves a good score against market attractiveness criteria. However, the cleared parts of the site are likely to go for residential development rather than provision of additional employment uses which affects its ranking.

Environmental Sustainability and Strategic Planning

5.319 The site has a moderate / good sustainable and strategic planning performance. Whilst it is out of centre and not in close proximity to a public transport interchange, the footpath links to the site are good with regular bus routes servicing the area. Redevelopment of this previously developed land represents an opportunity to enhance the environmental quality as well as improve economic activity within the area although the site's contribution to economic objectives is reduced due to the scale of likely employment capacity and the current high levels of economic activity / low levels of deprivation in the local area.

Role within Employment Hierarchy

5.320 The site is ranked as 'Mixed Use'.

Preston Rural

5.321 None

South Ribble

Leyland and Farington

RO Matrix Park

5.322 This site forms part of the Buckshaw Village development. Matrix Park is a large, level site which contains modern employment uses. The site is located in an area of broader regeneration coming forward for employment development. Current neighbours to Matrix park comprises modern residential development, green space and areas under development.

5.323 Matrix Park comprises of approximately 16.09 hectares and has been entirely allocated for commercial and business development. To date, 11.094 hectares has been developed, providing a total employment floor space of 46,700.8 sqm. for Use Classes B1, B2 and B8. In addition, ALDI has committed a large plot to facilitate a 28,394 sqm. warehouse distribution premises but this has not yet been taken up. The remainder of the site without commitments includes a corner landmark site of 2.03 hectares.

Commercial (Market Attractiveness)

5.324 Matrix Park performs very well against market attractiveness criteria. It offers a range of existing modern premises and development plots adjacent to major arterial roads and within 500 metres of the motorway. The local road network is excellent and is able to support a range of commercial vehicles.

5.325 Existing units appear to have a high occupancy. The site is being actively marketed and together with recent developments and current commitments, illustrates the level of strong demand for employment development in this location.

5.326 Based on its very strong score against market attractiveness and with no apparent development constraints to delay development of the remainder of the site, it is likely that undeveloped parts of Matrix Park this will be taken up for a range of requirements.

Environmental Sustainability and Strategic Planning

5.327 Overall Matrix Park achieves a good score against sustainability and strategic planning criteria. The site is previously developed and is of low environmental sensitivity. It is served by good quality local footpath and cycle routes. The anticipated opening of the Royal Ordnance Railway Station will enhance public transport accessibility. However, as the site is out of an urban area, it is likely that there will be a heavy reliance on cars, evidenced by the level of on-street car parking observed during the site visit.

5.328 Development of the site with good quality employment buildings and residential dwellings has and will continue to improve the environmental quality of this previously-developed site.

Role within Employment Hierarchy

5.329 The site is ranked as 'Best Urban'.

5.330 It is recommended that a Green Travel Plan be prepared to guide the development of the remainder of the site, particularly proposals involving the creation of travel intensive uses.

Moss Side Test Track

5.331 The Moss Side Test Track is subject to Policy EMP6 within the Local Plan to provide mixed use development with an emphasis to deliver a predominant element of employment uses. The site is no longer in active use for vehicle testing however, to date, there have been no commitments. It is understood that the owners are investigating options for its development and that a Masterplan is to be progressed by the owners. The redevelopment of this site to provide mixed use development is likely to require additional access to be provided to the site. There are access issues to be addressed and resolved before a site of the size and extent of development potential as the test track can take place.

Commercial (Market Attractiveness)

5.332 Access to Moss Side Test Track was limited and the site achieves a weaker market attractiveness score by comparison to other established nearby sites such as Moss Side and Moss Side Development Park (previously known as Aston Moss) discussed separately. This lower score was also influenced by the site's screened nature, lack of street frontage and potential of contamination from use as a test track.

Environmental Sustainability and Strategic Planning

5.333 The Test Track site performs reasonable well against sustainability grounds with broadly similar locational characteristics to Moss Side Development Park but with an absence of good footpath and cycle links. Given the possibility of achieving a comprehensive mixed-use development, and the associated economic and environmental benefits which would arise, this would elevate the site's economic and environmental performance.

5.334 Redevelopment of this site for mixed use development should consider implementation of a Green Travel Plan and a Sustainability Plan which need to set out a framework to guide future development of this large site.

Role within Employment Hierarchy

5.335 Moss Side Test Track is ranked as 'Mixed Use'. Delivery will require addressing current access constraints (most appropriately achieved

through delivering the site comprehensively and working with adjoining landowners as may be necessary to provide access) and the development of a Master Plan to guide whole scale redevelopment. Preparation of a Green Travel Plan and Sustainability Plan should also be considered to underpin any major regeneration proposals.

Moss Side and Moss Side Development Park (previously Aston Moss)

- 5.336 These two sites have a collective site area of approximately 40 hectares. They are located east of Leyland Town within an area known as Moss Side.
- 5.337 Moss Side Development Park is located to the north of the Moss Side Test Track site and contains a number of industrial units. A key occupier is TNT which occupies a large building and has some vacant land to its southern boundary. Other occupiers include Toro Track and Clean Air Power.
- 5.338 Moss Side employment site is a well established employment location and is occupied by a number of large and small businesses. Buildings are generally of average to good quality. This site is closer of the two to an arterial road.

Commercial (Market Attractiveness)

- 5.339 Moss Side Development Park achieves a good score against market attractiveness, with operators on site including large national/international businesses accommodated in purpose built modern facilities. The site has a high occupancy rate and the site is accessed via good quality local roads that do not appear to be congested.
- 5.340 Moss Side Employment Site achieves a moderate score against market attractiveness. The site contains a large number of business units but certain areas / units are poorly maintained. The site does however have a good local road frontage.

Environmental Sustainability and Strategic Planning

- 5.341 Moss Side Development Park achieves a moderate score against sustainability and strategic planning indicators. Whilst access to public transport is fair, potential to improve the environmental quality of this already developed out of centre site is neutral. In addition, due to the lack of further development potential, further delivery of economic objectives and benefits are also limited.
- 5.342 The vacant part of the TNT site could come forward to allow TNT to expand or to provide additional / secondary access to the Test Track site discussed above which could assist in it coming forward for mixed use redevelopment.
- 5.343 The Moss Side employment site represents an opportunity (in small pockets) for redevelopment to introduce better quality employment uses which could enhance its environmental quality and attract appropriate sectors and occupiers.

Role within Employment Hierarchy

- 5.344 Moss Side Development Park is ranked as 'Owner Specific'.
- 5.345 Moss Side is ranked as 'Other Urban' and with some potential to deliver improved employment facilities through redevelopment.

Leyland/ Farington Employment Land Cluster

- 5.346 This area comprises of established employment sites (*Lancashire Business Park, Leyland Business Park, Centurion Way Estate, North of Golden Hill Lane, Tomlinson Road, Braconash Road & Heaton Street*). They are collectively located within the urban area of Leyland, north of Leyland Town Centre.
- 5.347 Leyland Business Park and Centurion Way Estate are located on the eastern side of the railway line whereas the remaining sites are on the western side of the railway.
- 5.348 Generally, the cluster of this employment land adjoins open countryside to the north and part of its eastern boundary, and residential development to the west and south. The four allocated employment sites and Farington Business Park are discussed separately under individual headings.
- 5.349 Collectively, the Leyland/ Farington Employment Land Cluster achieves a moderate to good market attractiveness score with sites that have some modern buildings and better road frontages achieving a slightly better score. Overall, all the sites are located away from major arterial roads and motorways which affects their strategic accessibility.

Lancashire Business Park

- 5.350 Lancashire Business Park is a large established employment area in multiple occupancy. Main vacant plots within and adjoining the site are considered separately as specific local plan allocations. Excluding these, the eastern section of the site has residual land of 14.6 hectares which has been committed for a Waste Technology Park. It is accessed off Farington Road to the north and Centurion Way in the south. To the east, it adjoins a railway line and an established employment land cluster to the south.

Commercial (Market Attractiveness)

- 5.351 Whilst the quality of the existing building portfolio on site is average to good, local road access including the internal road circulation is confusing and the site is likely to have a number of environmental constraints (including medium risk of flooding in parts) as well as sensitive land uses nearby which reduce its market attractiveness score. Road frontage to this large existing employment site is limited which further influences its depressed market attractiveness score.

Environmental Sustainability and Strategic Planning

- 5.352 Lancashire Business Park is one of the poorer performers in the Leyland / Farington employment land cluster when measured against sustainability indicators due largely to its distance from good public transport links and general lack of nearby cycle and foot path links. Whilst it is likely to have some contamination, it would be suitable for other similar employment related development.
- 5.353 Given that the site is fully developed (apart for sections which are separately allocated), there is very limited infill and intensification potential on this established employment site.

Role within Employment Hierarchy

- 5.354 The site is ranked as ‘Other Urban’. Whilst it would be very important to retain this established employment site, internal access and circulation combined with poor road frontage affect its score. Improving directional signage and the general circulation to and within the site as well as

encouraging more sustainable means of travel including provision of cycle paths to the site could improve its classification to 'Good Urban'.

Leyland Business Park

- 5.355 Leyland Business Park comprises of approximately 14.5 hectares and is currently occupied by a group of circa 1960s employment buildings. It adjoins a railway line to the west, beyond which is Lancashire Business Park. It also adjoins a playing field to its east and a greenfield land to the north and south.

Commercial (Market Attractiveness)

- 5.356 Leyland Business Park's achieves a good market attractiveness score due to good quality local roads that lead to the site, long local road frontage and good maintenance of existing buildings. Additionally, the site is fairly regular in shape with no major physical constraints. Small pockets of the site have an opportunity to deliver additional infill employment development.

Environmental Sustainability and Strategic Planning

- 5.357 Leyland Business Park achieves a good Environmental Sustainability and Strategic Planning Score due to its potential to enhance environmental quality by introducing infill development. It is within 1 kilometre of a bus route and represents previously developed land where any future intensification / infill could help increase economic activity in the area.

Role within Employment Hierarchy

- 5.358 Overall, the site is ranked as 'Good Urban'.

Centurion Way Estate

- 5.359 The Centurion Way Estate contains a mixture of modern small scale industrial and warehousing units and a Tarmac company within the northern part of the site. It adjoins a railway line to the west, beyond which is the large part of the employment land cluster. To the south, the site adjoins residential buildings.

Commercial (Market Attractiveness)

- 5.360 The quality of local roads together with average quality buildings, poor road frontage visibility and nearby residential uses affect its market attractiveness score despite the site not being affected by any major physical constraints.

Environmental Sustainability and Strategic Planning

- 5.361 Centurion Way Estate achieves a similar Environmental Sustainability and Strategic Planning score to Leyland Business Park due its potential to enhance environmental quality by introducing infill development and its previously developed land status.

Role within Employment Hierarchy

- 5.362 The site is ranked as 'Other Urban'. Whilst it achieves a better strategic planning score than Lancashire Business Park, its overall business image with poor road frontage and sensitive nearby uses affects its overall qualitative performance.

North of Golden Hill Lane

- 5.363 This site is a medium size site which is accessed off Golden Hill Lane. Part of the site has already been redeveloped for residential use. The remainder of the site contains a vacant warehouse and is uncommitted. It has

potential to deliver enhanced employment accommodation but could come under pressure for residential (led) development.

Commercial (Market Attractiveness)

- 5.364 The site achieves a moderate market attractiveness score due to a restricted local road frontage, low quality of existing employment buildings (which are currently vacant), its proximity to sensitive land uses, restricted access and potential for contamination. The site has also been put forward for residential development through a site suggestions.

Environmental Sustainability and Strategic Planning

- 5.365 North of Golden Hill Lane, like Tomlinson Road, Braconash Road and Heaton Street achieve a good score against strategic planning and sustainability indicators, mainly due to its potential to provide infill development or redevelopment on parts of the site which would significantly improve environmental quality and tackle low economic activity and multiple deprivation in this area. However, given that a large part of the site has already been lost to residential development, there will likely be further pressures to develop the remaining employment land into non-employment uses.

Role within Employment Hierarchy

- 5.366 The site is ranked as 'Good Urban'.

Tomlinson Road, Braconash Road and Heaton Street

- 5.367 The sites within the western part of this employment land cluster includes Tomlinson Road, Braconash Road and Heaton Street. They are established employment sites which are occupied by major businesses such as Berrys, Royal Mail and Parcelforce. The site adjoins residential uses to the west and south, and other employment land to the north and east.

Commercial (Market Attractiveness)

- 5.368 Overall, the sites achieve a good market attractiveness score due to their size, topography and good local road frontages. It is likely that parts of the site have a degree of contamination. A small part of the Heaton Street site has a medium risk of flooding. However despite these constraints, the sites are likely to continue to be suitable for most employment uses.

Environmental Sustainability and Strategic Planning

- 5.369 Tomlinson Road, Braconash Road and Heaton Street achieve a good score against strategic planning and sustainability indicators, as the potential for infill or redevelopment on parts of the site(s) would significantly improve the immediate environmental quality. The ward in which they are located is also identified as one where there is low economic activity and high multiple deprivation. Redevelopment and infill development would therefore also assist in addressing these indicators.

Role within Employment Hierarchy

- 5.370 The site is ranked as 'Good Urban'.

King Street

- 5.371 The King Street site of 0.5 hectares is located within the central part of Leyland. The site contains period brick warehouse and office buildings which appear to have been recently refurbished and are in multiple

occupancy, used as sui generis, bulky goods retail (carpets, wood flooring/laminating) and offices occupied by Datrix Training.

- 5.372 The site adjoins period residential terraces to the east, north and west and a car park to the south.

Commercial (Market Attractiveness)

- 5.373 The site achieves a fair market attractiveness score. The local roads are of relatively good quality and the site is in close proximity to the M6 Motorway. However, the site is fairly small in size and does not represent an opportunity for additional development. The score is further affected by unknown ownership and no known owner aspirations for the site.

- 5.374 The unoccupied office space are currently marketed on site.

Environmental Sustainability and Strategic Planning

- 5.375 The site achieves a good score against sustainability indicators due to the site's proximity to main bus routes/public transport interchange, good footpath links and previously development land status. However in terms of strategic planning and economic objectives, the site is unable to introduce further economic activity or affect multiple deprivation indicators as there is no further capacity to introduce employment uses on this site without redevelopment.

Role within Employment Hierarchy

- 5.376 The site is ranked as 'Other Urban'.

Lostock Hall, Bamber Bridge and Penwortham

Walton Summit

- 5.377 This is a very large established employment site of over 95 hectares located east of Bamber Bridge and bounded by the M61 to the west and M6 to the east with a link road to its south.

- 5.378 Walton Summit comprises of over 500 business units, predominantly workshop and light industrial with smaller storage and distribution facilities also provided on site.

- 5.379 The site adjoins Sceptre Point to the south which is a Business Park providing modern office development. To the east, it adjoins a meat packaging plant, owned by Dunbia (previously by Kepak) and to the north and east, a small pocket of residential dwellings. There are no cycle routes or continuous footpaths within Walton Summit, however there is a proposed cycle route that would connect the northern part of Walton Summit with Bamber Bridge Railway Station. In addition, buses operate through the area with a number of bus stops within Walton Summit (located on Summit Road, Church Road, Four Oaks Road and Brierley Road).

Commercial (Market Attractiveness)

- 5.380 Walton Summit achieves a strong market attractiveness score due to its location adjacent to two motorways and established business image, despite the mixed quality of buildings. Whilst the site is likely to be contaminated (in some parts), this is unlikely to be an issue for redevelopment into similar uses.

- 5.381 The site has very low vacancies which suggests that there is a strong demand for locating a business within Walton Summit. However, this large established site appears to have reached its development capacity.

Environmental Sustainability and Strategic Planning

5.382 The site achieves a fair score against sustainability and strategic planning indicators due to its out of town location and poor provision of footpaths and cycle routes. The site already makes a good contribution towards economic objectives but given the already developed nature of site, the potential for further contribution is limited.

Role within Employment Hierarchy

5.383 This site is ranked as 'Good Urban'.

Sceptre Point

5.384 Sceptre Point is a 3.04 hectare employment site south of Walton Summit. It contains purpose built, attractive modern office buildings, all of which appear to be fully occupied.

5.385 The site is almost immediately located by the M61 motorway and adjoins other employment uses. To the east, it adjoins a greenfield site (Seed Lee Farm) which is allocated for employment to create a prestigious gateway into the Borough.

Commercial (Market Attractiveness)

5.386 The site achieves a good score against market attractiveness criteria. It adjoins two motorways and an arterial road. Whilst the internal road network is somewhat narrow, this infrastructure is new and purpose built. The business image is very good with attractive modern buildings achieving a high occupancy.

Environmental Sustainability and Strategic Planning

5.387 The site is greenfield and is not in a sustainable location in terms of transport accessibility or accessibility to town centre services etc. However, redevelopment of the site has introduced good quality footpath networks into the area.

5.388 The site already makes a good contribution towards economic objectives but given the already developed nature of site, the potential for further contribution is limited.

Role within Employment Hierarchy

5.389 The site is ranked as 'Good Urban'.

Club Street

5.390 This is a 13.67 hectare established 'employment' centre occupied by a wide mix of operators from bulky goods retail to light industrial, industrial/manufacturing and storage and distribution. Part of the north east quadrant of the site remains undeveloped. Planning permission granted for small business units in this area has now expired.

5.391 The site is largely surrounded by residential development comprising of semi detached dwellings to the east, terraces to the north and west, and a combination of semi detached and terraced dwellings to the south. A part of the site's eastern boundary adjoins the motorway.

Commercial (Market Attractiveness)

5.392 The site achieves a fair score against market attractiveness criteria. It adjoins a motorway and the quality of local roads is good. However, the building portfolio is average which affects its business image and could be improved. Occupancy on this site generally appears reasonable, although a

number of units were being marketed at the time of the site visit. Local road frontage is poor.

Environmental Sustainability and Strategic Planning

- 5.393 The site achieves a good score against sustainability and strategic planning criteria. The site is in a sustainable location and is previously developed land. Whilst footpath and cycle links require improvements, public transport access is good with bus stops located in close proximity.
- 5.394 Development of the north western quadrant for small employment uses has potential to improve economic activity. Consideration could be given to improving some of the internal footpath network of the estate to enhance attractiveness and permeability.

Role within Employment Hierarchy

- 5.395 The site is ranked as 'Other Urban'.

Brownedge Road

- 5.396 This former employment site, predominantly occupied by Baxi Heating, has been redeveloped for residential development and now only contains a small pocket of office use.
- 5.397 The site is 5 hectares of which less than 1 hectare remains in employment use. To the south, the site adjoins a railway line and to the east and west it adjoins residential dwellings. To the north of the site is St Mary's Church.
- 5.398 The site has three local road frontages of which Brownedge Lane and Brownedge Road are the most active.

Commercial (Market Attractiveness)

- 5.399 The site achieves a fair score against market attractiveness. It is within close proximity to an arterial route and the quality of (employment) buildings on site is reasonable. However, the site is made up of predominantly residential use and the prospects for employment development are limited as a result.

Environmental Sustainability and Strategic Planning

- 5.400 The site achieves a fair to strong sustainability score influenced mainly by its location and previously-developed status. Opportunities to provide strategic planning economic objectives are limited however given its already developed nature, largely for housing use.

Role within Employment Hierarchy

- 5.401 The (existing employment part of the) site is ranked as 'Other Urban'.

North of Lostock Lane

- 5.402 This established 21.74 hectare employment site has undergone a major change in terms of the facilities and services it provides. A significant part of the site is now occupied by Sainsbury's Supermarket, a petrol filling station, hotel and a restaurant. The remainder (rear part of the site) continues to operate as Cuerden Mill Depot with other storage and light industrial functions operating from the north most part of the site.
- 5.403 The site adjoins a railway line to the north and greenfield land /playing field along to the east.

Commercial (Market Attractiveness)

5.404 The site adjoins the A6 and is approximately 1 mile from Junction 29 of the M6. A small pocket of land of 0.7 hectares within the western part of the site has planning permission for office development and appears to be under construction.

5.405 The site is surrounded by land which contains a similar mix of uses. The low vacancy rate on site suggests that the site is reasonably popular however a small part of the site has Category 2 – medium risk of flooding.

Environmental Sustainability and Strategic Planning

5.406 Overall the site scores well in terms of environmental sustainability. Despite being in an out of centre location, the site does have reasonable access to bus and rail facilities. It is previously developed land within an urban area. In the absence of a public transport interchange the site scores moderately in terms of its strategic location and sustainability.

5.407 There is potential for infill development within the south east part of the site. Planning permission for B1 offices in this location has been committed which will increase economic activity and contribute to strategic objectives. Longer term aspirations for comprehensive redevelopment of the rear part of the site could deliver enhanced employment (and other) space but this would need to be considered in the context of impacts on employment supply, particularly for industrial type uses existing within this location.

Role within Employment Hierarchy

5.408 The site is ranked as 'Mixed Use'. In particular, consideration should be given to the potential for mixed use development over the rear part of the site, including an appropriate element of employment floorspace, to enhance the appearance and maximise the use of the rear part of the site.

South of School Lane

5.409 This site of just below 6 hectares is an established employment site of 52 units providing warehouse/workshop and office accommodation. The small workshop units appear to be popular and have a high occupancy rate attracting start up businesses. The remainder of the site provides more recent warehouse accommodation occupied by established local businesses. These also have a high occupancy.

5.410 Part of the site contains a cluster of residential dwellings and a substation. The site is surrounded by residential development, predominantly older period terraces with narrow gardens that back onto the employment site.

Commercial (Market Attractiveness)

5.411 The site has a very narrow road frontage and is surrounded by residential uses which limit the type of businesses that can operate from the site. This being said however, the site appears to be popular with start up businesses which are in good demand.

5.412 A small part of the site remains undeveloped and is located along the southern boundary of the site closest to residential uses. Whilst it provides an opportunity for development to small workshops for example, the employment uses that could operate would be influenced by its sensitive location, adjacent to residential dwellings.

Environmental Sustainability and Strategic Planning

5.413 The site scores fairly against the sustainability criteria. Whilst there are bus stops close to the site, local footpath provision is not continuous and cycle facilities in the area are limited.

5.414 The site does provide an opportunity to introduce more small start up units within the southern part of the site which would increase economic activity and achieve some of the strategic planning objectives.

Role within Employment Hierarchy

5.415 The site is ranked as 'Good Urban'.

North of School Lane

5.416 This is a large established employment site of over 10 hectares which is occupied by a number of operators (B1, B2, B8 and sui generis uses). The site is almost entirely surrounded by residential uses and adjoins public open space to the north.

5.417 The quality of buildings on site varies from older brick warehouses and converted office buildings to more modern prefabricated buildings. The middle section of the site is undeveloped, however, it is not clear whether this part of the site is in the same ownership as the adjoining land and hence, whether it represents a (long term) owner specific expansion or potential to provide additional independent employment use.

Commercial (Market Attractiveness)

5.418 The site provides both average employment accommodation for some of the smaller occupiers as well as bespoke accommodation for some of the larger occupiers of the site including Arla Foods and Hansan Bamber Bridge Concrete Works.

5.419 The site overall achieves a reasonable score for market attractiveness. The overall accessibility to the site is moderate. The site has an extensive frontage to Chorley Road but there are many area / different occupiers on other parts of the site which do not have frontages. The site appears to have a high occupancy and whilst owner aspirations for the site are unknown, part of the site has been put forward for residential led redevelopment through Site suggestions by two separate organisations.

Environmental Sustainability and Strategic Planning

5.420 The site adjoins the main bus route that operates through School Lane and a frequent bus service also operates along Chorley Road. However the quality of footpaths linking the site are poor and there are no cycle links which reduces the site's transport and sustainability score to average.

5.421 Whilst the quality of buildings is mixed, the site has a low vacancy rate. Redevelopment of these older units would not significantly impact positively on the environment as the site has limited road frontage.

5.422 The vacant piece of land within the central part of the site represents an opportunity to provide additional employment floorspace as either an owner specific expansion or development to accommodate new businesses into the site. The development of this part of the site therefore can assist in generating additional economic activity and achieving certain strategic planning and economic objectives.

Role within Employment Hierarchy

5.423 The site is ranked as 'Good Urban'.

Sherdley Road

5.424 This 3.96 hectare site is a well established employment site occupied by a group of businesses including Lunar who manufacture caravans and MPH glass. The old mill building located on site is in a poor condition and is

occupied by a cluster of small businesses including a motor bike servicing workshop.

- 5.425 The site is accessed from Sherdley Road and is almost entirely surrounded by residential buildings with a part of its southern boundary adjoining the River Lostock and a railway line. Beyond the railway line is a pocket of designated open space.

Commercial (Market Attractiveness)

- 5.426 The site is in employment use and is fully developed however a large part of the site is under-occupied and could be used more intensively for employment use / older buildings renewed to enhance the quality of existing accommodation. The entire site is poorly maintained with poor quality local road network which is reflected in its market attractiveness score. Two small parts of the site are Category 2 flood risk areas.

- 5.427 Due to the proximity of residential dwellings adjacent to the site, this could restrict certain types of occupier. Any redevelopment will need to consider the risk of flooding affecting part of the site.

Environmental Sustainability and Strategic Planning

- 5.428 The site is of low sensitivity in terms of environmental resources as it is previously developed land and is not affected by a significant number of environmental constraints. However, the site is located outside of the urban area's centre. Any future (re)development of the site could appropriately seek to improve and encourage improving the internal pedestrian network.

Role within Employment Hierarchy

- 5.429 The site is ranked as 'Other Urban'.

Factory Lane

- 5.430 Adjacent to a railway line, this 4.23 hectare site on the eastern edge of Penwortham provides older style office and warehousing premises. The site appears to be fully occupied and provides low cost employment accommodation. Whilst the buildings are sparsely distributed within the site, the open, undeveloped parts of the site are covered in hard standing and provide open yard storage as well as parking for DB Taxis which occupies part of the site.

- 5.431 The site is allocated as an existing employment site in the Local Plan. To the south and part of its western boundary, the site adjoins residential uses. To the north and part of its western boundary, it adjoins open space and the railway line to the east.

Commercial (Market Attractiveness)

- 5.432 The site achieves a low score against certain business image indicators due to the poor quality of buildings and access. However, the site is well occupied and appears to attract small start up businesses which do not rely on good road frontage visibility. Existing hardstanding areas could offer an opportunity for intensification of use although this could be limited in terms of nature and amount due to existing constraints.

- 5.433 Whilst the larger businesses utilise the hard standing areas within the site, should they vacate the premises, this land could come forward for development of small industrial and office units. However, the intensity of employment uses on this site is likely to attract the need to improve the overall accessibility to the site. Due to the poor quality of local roads in terms of traffic and safety, the size of vehicles entering the site could be

limited which would dictate the type of employment use that can be delivered on this site. It is also likely that any future development would need to address the medium flood risk on site (Category 2).

Environmental Sustainability and Strategic Plan

- 5.435 The site is previously developed land within an urban area. There are good bus links to the site but it is not located in close proximity to a transport interchange and city centre. Overall the site scores moderately against environmental sustainability and strategic planning considerations.

Role within Employment Hierarchy

- 5.436 The site is categorised as 'Other Urban'.

Lostock Hall Gas Works

- 5.437 This former gas works site ceased operating in the 1970s. The non-operational part of the former gas works is 10.5 hectares and has been cleared and remediated although two gas holders remain within the south eastern quadrant of the site. To the north of the site, beyond the railway line, the site adjoins residential development. To the east, the site adjoins an open space. The land adjoining this site to the west and south is designated in the local plan for housing development, most of which has now been completed.

- 5.438 The site is allocated in the local plan for mixed use development. A decision is awaited on an outline planning application. This proposal was considered at planning committee on 28 March 2007 with a resolution to permit redevelopment of this site (to comprise 6,504 sqm. of employment land (B1 and B8), a Local Centre providing a floor space of 1,393 sqm. for A1 through to A5 uses and 198 dwellings) subject to the completion of a Section 106 Agreement. The S106 has not yet been signed.

Commercial (Market Attractiveness)

- 5.439 This is a large site that achieves a reasonable market attractiveness score. The site has been allocated for mixed use development for several years without development. It is clear from the current planning application that aspirations are to deliver a residential led development that will also deliver an element of some employment space. With the site already remediated, there appear to be no major physical development constraints.

Environmental Sustainability and Strategic Planning

- 5.440 The site represents an excellent opportunity to use brownfield land to deliver mixed use development in an area where local facilities and services are poor. Integrating a Local Centre within the development to reduce car travel will also achieve some of the sustainability objectives.
- 5.441 Any redevelopment of the site will need to bring forward good quality roads and footpath/cycle routes to encourage more sustainable means of travel. Introducing employment accommodation and the Local Centre will also contribute to the economic activity in the area.

Role within Employment Hierarchy

- 5.442 The site is ranked as 'Mixed Use'.

Eastern Parishes

Samlesbury Aerodrome

- 5.443 Samlesbury Aerodrome is just over 140 hectares and is located on the eastern boundary of the Borough, straddling the boundary of South Ribble

and Ribble Valley. The site is within a rural setting, approximately 1 kilometre south of the village of Balderstone. It is surrounded by open countryside. That part of the site also included in the Green Belt is within South Ribble Borough.

- 5.444 The site is divided into two distinct areas. The southern part contains three interconnecting runways / taxiways whereas the administrative, business and other buildings associated with the aerodrome are located close to the northern boundary. BAE Systems occupy the site.

Commercial (Market Attractiveness)

- 5.445 The site has good accessibility via the A667 and A59 which adjoin the site although the site itself is located in a remote rural location. The buildings on site are of good quality and of bespoke design. Whilst a large part of the site is underutilised and potentially available for development, any future employment commitments are likely to be related exclusively to the existing businesses that operate at the aerodrome. This is reinforced through recent Site suggestions which put the site forward for employment development within the context of a regionally significant employment site.

Environmental Sustainability and Strategic Planning

- 5.446 The site is in a rural location and is inaccessible by public transport which dramatically affects its sustainability score. Whilst it is accepted that aviation related industries are suited in locations close to or within an aerodrome / airport setting, if not already in place any future major development of this site will need to consider a Green Travel Plan and a Sustainability Plan to enhance sustainability credentials.
- 5.447 Good quality buildings that do not affect the openness of the adjoining Green Belt could improve the appearance of the site however any development on this site is likely to be delivered exclusively as expansion to existing aviation related industries on site.
- 5.448 This site is identified in a recent study commissioned by the North West Development Agency as a strategic site supporting a key sector of the economy including knowledge-based employment.

Role within Employment Hierarchy

- 5.449 The site is ranked as 'Owner Specific'.

Western Parishes

Liverpool Road, Walmer Bridge

- 5.450 This is a medium size greenfield site which has been allocated for mixed use development. The residential component and a public house have already been delivered and the remaining 2.79 hectares which is available for employment development has not been committed.
- 5.451 The site is irregular in shape and has a long frontage along the A59 route to the south. To the north of the site is a recent area of residential development. To the west, the site adjoins greenfield rural land.

Commercial (Market Attractiveness)

- 5.452 The site has poor motorway accessibility, located nearly 5 miles from the nearest motorway junction. However, the site has a good major road frontage and is surrounded by modern buildings. The site is flat and fairly regular in shape without any apparent implications of contamination or flood risk. The site adjoins residential development which could restrict the type of employment uses that can be delivered on site. The site has been

marketed for some time but it has not been committed for employment use. Overall, the site achieves a fair market attractiveness score.

Environmental Sustainability and Strategic Planning

5.453 The vacant part of the site is currently of no economic value and development will bring the site into productive economic use. This positive economic benefit must also be considered against the relatively poor performance against environmental sustainability criteria. The undeveloped parts of the site appear greenfield land and located on the edge of a small settlement with limited access to bus and rail.

Role within Employment Hierarchy

5.454 The site is ranked as 'Mixed Use' (with the vacant remaining part of the site safeguarded for employment).

Qualitative Assessment Overview

5.455 **Tables 5.3, 5.4 and 5.5** provide a summary of the sites which have been subject to qualitative assessment. In particular, the tables identify the 'scores' identified against the two broad appraisal criteria, together with their classification (i.e. ranking) in terms of their current role in the employment hierarchy. Where sites are ranked as owner specific no market attractiveness score has been given.

Table 5.3: Qualitative Assessment Scores and Ranking – Allocations and Main Commitments

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
Chorley Central	Railway Road, Adlington (47)	2	2-3	OU
	Botany/ Great Knowley Site (1)	3	2	GU
	Chorley North Industrial Estate (3)	3-4	2	GU
	Cowling Farm, Cowling Road (13)	3	2-3	OU
	M61/ Botany Site (2)	3-4	2	GU
	Red Bank/ Carr Lane (Duxbury Business Park) (17)	2-3	2	GU
	Southport Road (19)	3	2-3	OU
	Ackhurst Park/ Common Bank Employment Area (5)	3	2-3	GU
	Brook Mill, Brook Street and adjacent farm off Chorley Road, Adlington (53)	1-2	2	O
	Cowling Mill, Cowling Road (14)	2	2-3	OU
	Martindales Depot, Cowling Road (15)	2	2-3	OU
	Group 1, Buckshaw (37)	3-4	3	BU
	Southern Commercial Area, Buckshaw (38)	3-4	3	BU
	Regional Investment Site, Buckshaw (39)	3-4	3	BU
Stump Lane (16)	3	3	GU	

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
Chorley East	Crosse Hall Street including Weir Mill (24)	2 - 3	2-3	OU
	-	-	-	-
Chorley West	Rear of New Street, Mawdesley (46)	2	2 - 3	OU
Preston City Centre	Hill Street Car Park (not subject to qualitative assessment)	-	-	MU
Preston Inner Area	Ringway/ Falkland Street (78)	2-3	3-4	GU
	Deepdale Street/ Fletcher Street (44)	2-3	3	GU
Preston Western Suburbs	Preston Riversway (20)	3	2-3	GU
Preston Eastern Suburbs	Preston East Employment Area(7)	3-4	2	BU
	North Preston Employment Area (30)	3	2	GU
	Red Scar Industrial Estate (17)	2-3	3	GU
	Millennium City Park (1)	3-4	2-3	BU
	Site at Junction 31a (M6) West Loop (8)	3	2	MU
	Roman Way Industrial Estate (18)	3	2-3	GU
Preston Rural	Land North of Eastway (Broughton Business Park) (15)	2-3	2	MU
	Former Whittingham Hospital (87)	2-3	2	MU
Leyland & Farington	Farington Business Park (AS2)	2	2-3	OU
	Farington Road (AS3)	-	2	OS
	Land adjoining Lancashire Business Park (AS4)	2-3	1-2	OU [GU]
	Carr Lane (AS5)	3	2-3	GU
	Land within Lancashire Business Park (AS6)	2-3	2	OU/OS
	West Paddock (AS8)	3	2	GU
Lostock Hall, Bamber Bridge and Penwortham	South Rings (AS1)	3	2	GU
	Kellett Lane (AS7)	2-3	2	OU [GU]

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
Eastern Parishes	-	-	-	-
Western Parishes	-	-	-	-

Table 5.4: Qualitative Assessment Scores and Ranking – Other Sites

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Friday Street (8)	2	3-4	MU
	Gas Works, Bengal Street (27)	2-3	3	OU
	Common Bank Bleach Works (20)	1-2	2	OU
	William Lawrence Site (23)	2	3-4	OU
	Coppull Enterprise Centre (31)	3	3	GU
	Radburn Works, Sandy Lane (62)	1-2	2-3	MU
	Chorley East	Withnell Fold Mill (55)	1-2	2
Abbey Village Mill (56)		2	2-3	MU
Chorley West	Twin Lakes Industrial Estate (41)	2	2	OU
Preston City Centre	Avenham Street (56)	2	3-4	MU
	Shepherd Street/ Oakham Court/Laurel Street (63 & 64)	2-3	3-4	MU
	Walker Street/ Great Shaw Street (60)	2	3-4	OU
	North Road A (69)	2-3	4	OU
Preston Inner Area	Potential Central Business District (79)	2-3	4	MU
	Warehouses, Holme Slack Lane (3)	2	3	OU
Preston Western Suburbs	Riversway Phase B (25)	3	3	GU
Preston Eastern Suburbs	Sharoe Green Hospital (29)	2-3	3	MU
Preston Rural	-	-	-	-
and and Fari ngto	RO Matrix Park (OS2)	3-4	3	BU

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Moss Side Sites (MU1, OS1 & EMP 3/7)			
	Moss Side Development Park	-	2	OS
	Test Track	2	2	MU
	Moss Side	2-3	2-3	OU
	Leyland Employment Land Cluster (OS5, EMP3/3, EMP3/4, OS6, EMP4/7, EMP3/5, EMP3/6, EMP4/9, EMP4/10 and EMO4/11)			
	Lancashire Business Park	2-3	2	OU (GU)
	Leyland Business Park	3	2-3	GU
	Centurion Way Estate	2-3	2	OU
	North of Golden Hill Lane	2-3	3	GU
	Tomlinson Road	2-3	3	GU
	Braconash Road	2-3	3	GU
	Heaton Street	2-3	3	GU
	EMP4/8 King Street	2	2-3	OU
Lostock Hall, Bamber Bridge and Penwortham	Walton Summit (EMP 3/1)	3	2	GU
	Sceptre Point (OS4)	3-4	2	GU
	Club Street (EMP4/2)	2	3	OU
	Brownedge Road (EMP4/3)	2	2-3	OU
	North of Lostock Lane (EMP4/4 & OS7))	2-3	2-3	MU
	South of School Lane (EMP4/1)	3	2-3	GU
	North of School Lane (EMP3/2)	3	2-3	GU
	Sherdley Road (EMP4/5)	2	2-3	OU
	Factory Lane (EMP4/6)	2	2-3	OU
	Lostock Hall Gas Works (MU2)	2	2	MU
Eastern Parishes	Samlesbury Aerodrome (SS33)	-	2	OS
Western Parishes	Liverpool Road, Walmer Bridge (MU3)	3	2	MU

Table 5.5: Qualitative Assessment Scores and Ranking – Remainder of ‘Other’ Sites

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Highfield Industrial Estate (4)	3	2-3	GU

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	George Street/ Clarence Street Estate Including Brunswick Mill (6)	2	3	OU
	Apex House, Stump Lane (7)	2	2-3	OU
	East Chorley Business Park (9)	3	3	GU
	Moorfield Industrial Estate, Cowling (10)	-	3	OS
	Yarrow Mill Industrial Estate (11)	2	3	OU
	Quarry Road Industrial Estate (12)	2	3	OU
	Telent Site (18)	3	2	GU
	Land and Park Mills Deighton Road (21)	2	2-3	OU
	Duke Street Motors Site (22)	2	3	OU
	Standish Street (26)	3	3	GU
	Cowling Business Park, Tincklers Lane (28)	2-3	2-3	GU
	Clover Road (29)	2	2	OU
	Chapel Lane Industrial Estate (30)	2 - 3	3	GU
	Blainscough Works, Blainscough Lane/ Preston Road, Coppull (32)	1	2	OU
	Land at Wigan Road (33)	2	2-3	OU
	Euxton Mill, Dawber Lane (34)	2	2	OU
	Rear of 37 – 41 Wigan Road (35)	2	3	OU
	Chorley Business and Technology Park (36)	3	2-3	GU
	Euxton Lane (40)	3	3	GU
	Market Street, Adlington (48)	3	2-3	GU
	Adlington South Business Village (49)	3- 4	2-3	GU
	Pincroft, Market Street (50)	3	2-3	GU
	Westhoughton Road (51)	2	3	OU
	Park Road, Adlington (52)	2	3	MU
	Grimeford Industrial Estate (54)	2	1-2	OU
	Swansea Lane (57)	2	2 - 3	OU
	Swansea Mill, Mill Lane (58)	2 - 3	2 - 3	OU
	Waterhouse Green, Rear of Chorley Old Road (59)	2	2	OU
	Land off Chorley Old Road (60)	1	1-2	O
	Kern Mill, Kern Mill Lane (61)	2	1 - 2	OU
	Preston Road (63)	3	2	OU

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Harpers Lane (68)	2-3	2	OU
	Briercliffe Road (69)	2-3	3	OU
Chorley East	Railway Road, Withnell (64)	3	2	GU
	Gregson Lane Industrial Estate (65)	2	1-2	OU
Chorley West	Rear of Carrington Centre(42)	2-3	2-3	MU
	Grove Mill (43)	2	2-3	OU
	Sagar House, Langton Brow (44)	3	2 - 3	GU
	Towngate Works (45)	2	1 - 2	OU
	Transport Depot, Rufford Road, Mawdesley (66)	2	1-2	OU
Preston City Centre	Frenchwood Knoll/ Selborne Street (48)	2-3	3-4	OU
	Unicentre, Derby Street (49)	3	3-4	GU
	Ormskirk Road (50)	2-3	4	MU
	County Offices, East Cliff (53)	2	3	OU/OS
	Winckley Square/ Chapel Street (54)	3	3	GU
	Fox Street/ Corporation Street/ Surgeon's Court (55)	2	3-4	MU
	St Joseph's Hospital, Mount Street (57)	2	3-4	MU
	Site of former St Mary's Church, Friargate Brow (58)	2	3	OU
	Hope Street/ Corporation Street (59)	2	3	OU
	Church Street/ Pole Street (61)	2-3	3	MU
	Walker Street (62)	3	3-4	GU
	Winckley Square (SW)/ East Cliff (65)	3	3	GU
	Winckley Square (South and East)/ Cross Street (66)	3	3	GU
	Princes Building, Lancaster Road (67)	2-3	3-4	MU
	Kaymar Industrial Estate (68)	2	3-4	OU
Preston Inner Area	Fire Station, Blackpool Road (4)	2	3	OU
	Skeffington Road/ Castleton Road (5)	2	3	OU
	The Brick House (6)	1-2	2	O
	25-109 Garstang Road (14)	2	3	MU
	Moor Lane/ Cragg's Row (31)	2	3-4	OU
	Council Depot, Argyll Road (32)	2	3-4	OU
	Moor Lane/ Victoria Street (33)	2	4	OU
	North Road B/ Kent Street (34)	3	4	GU
Rye Street/ Canute Street (35)	2	3-4	OU	

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Eastham Industrial Estate/ Aqueduct Street (36)	2	3	OU
	Deepdale Mill, Deepdale Mill Street (37)	2	3	OU
	Tennyson Road Mill (38)	2-3	3	OU
	Land at New Hall Lane/ St. Mary's Street (39)	2 - 3	3-4	MU
	Ribbleton Street/ Deepdale Road (40)	2	3-4	OU
	Ribbleton Lane/ Longworth Street (41)	2	3	OU
	Waverley Park Mill (42)	-	3	OS
	Deepdale Mill Street (43)	2	3	OU
	Crook Street/ Campbell Street (45)	2-3	3	OU
	Ribbleton Lane/ New Hall Lane (46)	3	3-4	GU
	Blackpool Road/ West View (47)	2-3	3	OU
	Tulketh Brow/ Fylde Road (70)	2-3	3	OU
	Depot, Shelley Road/ Old Lancaster Lane (71)	2	3	OS/OU
	Shelley Road (72)	2-3	3	OU
	Tulketh Mill (73)	3	3	GU
	Lane Ends Trading Estate (74)	2	2-3	OU
	Oxheys Industrial Estate (75)	2	2-3	OU
	Cattle Market (76)	2	2-3	OU
	Starkie Industrial Estate/ Brierley Street (77)	2	3	OU
	Croft Street/ Wellfield Road (80)	3	3-4	GU
	Jubilee Trading Estate (81)	2	3	OU
	Brunel Court, Ladywell Street (82)	2	3	OU
	Leighton Street (Gypsy site and adjacent land) (83)	2	3	OU
	West Strand/ March Lane (84)	3	3-4	GU
	Greenbank Street/ Bond Street (85)	2-3	3-4	OU
	Madulands, Aqueduct Street (86)	2	3	OU
Preston Western Suburbs	Hazelmere (County Fire Brigade HQ) (11)	2-3	2	OU/OS
	Cottam Hall Brickworks (12)	3	2-3	GU
	Cottam Local Centre (13)	3	2-3	GU
	Christian Road (21)	-	3-4	OS

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Hartington Road/ Fishergate Hill (22)	3	3	GU
	Midland House, Maritime Way (23)	2	2-3	OU
	Paley Road (24)	2	3	OU
	Riversway Sites 5/6 (26)	2	2	OU
	Bow Lane (27)	3	3-4	GU
	Riversway A – Portway/ West Strand (28)	3	2-3	GU
Preston Eastern Suburbs	Rough Hey Industrial Estate (2)	3	3	GU
	Site at Junction 31a (M6) East Loop) (9)	2	2	OU
	Fulwood Barracks (10)	2	2	OU
	Mondi Board, Longridge Road (19)	-	3	OS
Preston Rural	Depot, Whittingham Lane, Broughton (16)	2	2-3	OU
Leyland and Farington	Lane, Leyland (SS1)	2	2-3	OU
	Leyprint, Seven Stars (SS2)	2	2-3	OU
	Preston Road, Farington (SS4)	2	2-3	OU
	Bow Lane 1, Leyland (SS5)	-	3	OS
	Bow Lane 2, Leyland (SS6)	-	2-3	OS
	Goldenhill Leyland (SS7)	2	3	OU [GU]
	Longmeanygate, Leyland (SS8)	2	2-3	OU
	Quin Street, Leyland (SS10)	2	2-3	OU
	Earnshaw Bridge Mill (SS31)	2	2-3	OU
Lostock Hall, Bamber Bridge and Penwortham	Kepak, adj. Walton Summit (SS11)	3	3	GU
	Walton-Le-Dale Corn Mill, Chorley Road (SS17)	-	2-3	OS
	Vernon Carus, Factory Lane (SS18)	1-2	2-3	O
	Tardy Gate Mill (SS20)	2	2-3	OU
	Dardsley, Brownedge Road LH (SS21)	-	2-3	OS
	Hecla Works, Brown Street, Bamber Bridge (SS22)	2	3	OU

Sub Area	Site	Market Attractiveness	Strategic Planning and Sustainability	Classification
	Pear Street, Baber Bridge (SS23)	2	2-3	OU
	Liverpool New Road, Much Hoole (SS24)	2	2	OU
	Fourfields House, Station Road, Bamber Bridge (SS25)	-	2-3	OS
	Edward Street/ Winery Lane (SS26)	3	2-3	GU
	Aspden Street, Bamber Bridge (SS27)	2	2-3	OU
	Hopwood Street, Bamber Bridge (SS28)	2	2-3	OU
	Heatherfield Works, Church Road (SS30)	-	1	OS
Eastern Parishes	Samlesbury Mill, Goosefoot Lane (SS12)	1	1-2	O
	Roach Bridge Mill, Samlesbury (SS13)	2	2	O
	Higher Walton Mill (SS14)	2	3	MU
	Coupe Foundry, Higher Walton (SS15)	2	2-3	OU
	Bannister Hall Works (SS16)	1-2	1-2	O
Western Parishes	Bamfords Mill, Midge Hall (SS3)	2	2	O
	AMS Trading Estate, Brownhill Road (SS19)	-	2	OS
	Peel View, Drumacre Lane (SS29)	1-2	2	O/ OS
	Walmer Bridge (SS32)	2	2	OU

5.456 **Tables 5.6 and 5.7** provide a more complete overview of main sites, focussing on allocations and main commitments and also certain (larger) other sites with vacant land potentially capable of accommodating further employment use.

5.457 Information is provided on the types and estimate quantum of uses appropriate for development at each site assessed and the likely timescales for vacant land to be brought forward (i.e. immediate - short or, medium to long term).

5.458 **Table 5.8** gives an overview of the qualitative assessment for all remaining sites not include in Tables 5.6 and 5.7. On sites which have recently been redeveloped for residential, no market attractiveness or environmental sustainability and strategic planning commentary is given as the site has no potential for employment development.

A number of Chorley sites are not included in Tables 5.3 - 5.8 but they are covered in the main body of Chapter 5.

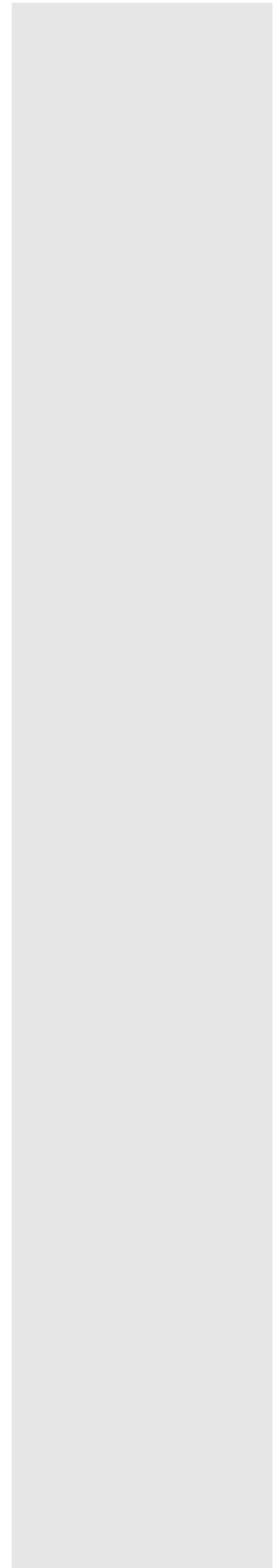


Table 5.6: Overview of Qualitative Assessment – Allocations and Main Commitments

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Chorley Central	Railway Road, Adlington (47)	OU	Medium to long	2	8,000	-	-	Part of site allocated as extension to park and ride for Adlington Railway Station. p&R facility is identified as an important facility to be retained on the site. Current owner is understood to not support employment on this site.
	Botany/ Great Knowley Site (1)	GU	Medium to long	14.1	14100	42,300	0	Comprehensive approach needed to bring forward this large greenfield site.
	Chorley North Industrial Estate (3)	GU	Immediate - short	0.4	280	800	650	Large modern site. Opportunities for infill and intensification only.
	Cowling Farm, Cowling Road (13)	OU	Medium to long	8.5	5,680	17,000	14,150	Large greenfield site adjacent to motorway. Access improvement works into the site are needed from Cowling Road. Addressing constraints could elevate its role in the hierarchy.
	M61/ Botany Site (2)	GU	Immediate - short	5.74 (committed)	3,729	11,712	7,000	Large site immediately adjacent to junction 8 of M61. Site is committed for employment development (3 separate planning permissions apply).
	Red Bank/ Carr Lane (Duxbury Business Park) (17)	GU	Medium - long	2.5	1680	5,000	4,150	Car park for adjacent convention centre (now closed) and mature vegetation. Link Road junction now provided. Possible pressure for residential.
	Southport Road (19)	OU	Immediate - short	2.1	8400	-	-	Vacant greenfield site owned by Lancashire County Council. Part of the site is identified as a Biological Heritage Site.
	Ackhurst Park/ Common Bank Employment Area (5)	GU	Immediate - short	(0.74 committed) (1.1 allocated without pp)	1,100 2,200	1,124 1,760	500	Extant planning permission for B1 plus further 1.1 hectares suitable for employment development.
	Brook Mill, Brook Street (53)	O	Medium - long	-	-	-	-	Allocated for employment redevelopment. Poor quality site with constraints will limit market attractiveness.
Group 1 Buckshaw (37)	BU	Short-medium	5.4	12,960	8,640	-	Part of Royal Ordnance site. Masterplan expected for site proposing some residential and some employment. Highly attractive site to the market.	

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
	Southern Commercial Area Buckshaw (38)	BU	Immediate - short	17.95 (allocated without permission)	14,360	28,720	35,900	Part of the high quality Urban Village at Euxton. 18ha of this site is allocated for employment and remains without permission. Around 5 ha has permission for employment development.
				4.69 (with permission)	2,814	8,442	7,035	
	Regional Investment Site Buckshaw (39)	BU	Immediate - short	8.9 (committed)	0	7,120	33,672	Part of the high quality Urban Village at Euxton site likely to be attractive to the market and all land committed (site subject to 3 separate planning permissions for manufacturing and warehousing and distribution development).
	Stump Lane (16)	GU	Immediate - short	0.98 (committed) 0.16 ha (available)	0 600	3800 0	0 0	Close to Chorley town centre, part of this greenfield site has been committed to provide 0.98 ha of B1 industrial development. A new access is being constructed onto Stump Lane.
	Cross Hall Street Including Weir Mill (24)	OU	Immediate - short	0.21 (part)	140	420	350	Predominantly occupied. Weir Mill is accessed separately from the north.
Chorley East	-	-	-	-	-	-	-	-
Chorley West	Rear of New Street, Mawdesley (46)	OU	Immediate - short	0.6	1,200	1,200	-	Scrap yard and undeveloped land within an existing employment site. Further development likely require relocation of the scrap yard.
	Twin Lakes Industrial Estate (41)	OU	Immediate - short	1.9	1,150	3,450	-	Committed but as yet unimplemented area forming part of a generally poor quality existing industrial estate.
Preston City Centre	Hill Street Car Park	MU	Medium	0.20	21,774	-	-	Site has planning approval for offices up to 21,774 sqm and a 130 bed hotel

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Preston Inner Area	Ringway/ Falkland Street (78)	GU	Immediate - short-	2.10	8,200	-	-	The site is able to provide approximately 8,200 sqm. of office floorspace through comprehensive redevelopment.
	Deepdale Street/ Fletcher Road (44)	GU	Immediate - short	1.24	-	4,960	-	Remaining land likely to be most suitable for smaller industrial-type occupiers.
Preston Western Suburbs	Preston Riversway (excluding Phase B) (20)	GU	Immediate - short	Allocated – Ste D2 (0.44 ha)	-	1,200	660	Plot 13C has planning permission for residential-led mixed use development including offices. Plot D2 is available for a range of B Class employment uses.
				Committed - Site 13C (0.93ha)	5,874	-	-	
Preston Eastern Suburbs	Preston East Employment Area(7)	BU	Short - Long	18.0 ha (committed)	6,750	-	47,000	Established employment site with excellent business image likely to attract higher end users. Large part of site acquired by Helios Slough to provide 65,000 sqm of new industrial and warehouse floorspace.
				16.89 (allocated)	6,756	40,536	25,335	
	Red Scar Industrial Estate (17)	GU	Immediate - short	Allocation 4.53 ha	1,812	10,872	6,795	Some 22 hectares of land within the Red Scar Site has been committed for employment uses. The site offers potential to meet a range of employment requirements.
				Committed (F, H and other) 21.92 ha	-	43,840	54,800	
	Millennium City Park (1)	BU	Immediate - short	3.5	1,400	8,400	5,250	This site has excellent opportunity to bring forward good quality new employment uses.
Site at Junction 31a (M6) West Loop (8)	MU	Immediate - short	4.32	1,728	15,552	-	Strategically located attractive greenfield site with potential to come forward as employment land and Class D2 uses.	
Preston Rural	Land North of Eastway (Broughton Business Park) (15)	MU	Medium - long	24.68	24,680	44,424	37,020	Large greenfield site. Full delivery of the site is dependent on completion of the Broughton Bypass anticipated post 2010. Part of site potentially required fro P&R facility.
	Former Whittingham Hospital (87)	MU	Medium - long	3.83	9,000	-	-	Part of site has been committed for B1 office development as part of the wider redevelopment of the former hospital. Full delivery of the site is dependent on completion of a link to the proposed the Broughton Bypass although this is not anticipated until post 2010.

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Leyland and Farington	Land adjoining Lancashire Business Park (AS4)	OU [GU]	Immediate - short	23.33	23,330	46,660	29,162.5	The site is within an established employment land cluster. Whilst greenfield in appearance, it is likely to have been in employment use in the past. A Green Travel Plan is likely to be required to improve its sustainability score and role in hierarchy.
	Carr Lane (AS5)	GU	Immediate - short	2.7	2,700	5,400	3,375	More than half of the site has been completed for Industrial/warehouse development. The site has a positive business image and is likely to attract further employment development on the remainder of the site. The entire site has outline planning permission for B1. B2 and B8 development.
	Land within Lancashire Business Park (AS6)	OU/OS	Immediate - short	3.43 – (allocation) 14.6 (committed)	3,430	6,860 32,920	4,287.5	Allocated rectangular plot within the centre of LEBP used (informally) for open storage. Site may be owner specific (Leyland Trucks). 14.6 hectares with planning permission for a Waste Technology Park, classified as Use Class B2.
	West Paddock	GU	Medium - Long	1.94	7,760	-	-	Greenfield site but has been available without planning permission for several years. Council aspiration to develop for high quality civic / employment use with part retained of site for open space/ leisure.
	OS2 RO Matrix Park	BU	Short - Medium	2.03 allocated 12.778 committed	8,120	-	28,394	Large, highly attractive site containing modern buildings and presenting a very good business image.
Lostock Hall, Bamber Bridge & Penwortham	South Rings (AS1)	GU	Immediate - short	5.147 (allocation) 6.03 (Committed)	19,322 24,120	-	-	The remainder of the site (6.03ha) has been allocated for B1 office development of which 3,863 sqm. is currently under construction. Remainder of site also subject to part unimplemented planning permission which could deliver additional office development.
	Kellett Lane (AS7)	OU (GU)	Immediate - short	4.93 (allocated) 0.51 (committed)	17,680 2,040	-	-	Approximately 0.51 hectares has been committed for B1 Office use. The site is entirely greenfield with strong owner aspirations for employment use. Green Travel Plan and Sustainability Plan required to enhance sustainability score and potential role in the employment hierarchy.

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
	Lostock Hall Gas Works (MU2)	MU	Medium - Long	10.5 ha (assumed only 1.5 ha for employment)	900	5,000	654	Site remediated for residential led development also with new employment floorspace (still to be implemented) secured through outline planning permission.
Eastern Parishes	-	-	-	-	-	-	-	-
Western Parishes	-	-	-	-	-	-	-	-

Table 5.7: Overview of Qualitative Assessment – Selected Other Sites (Larger Commitments and / or with (part) vacant with potential for further employment development)

Sub Area	Site	Classification	Availability (years)	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Chorley Central	Common Bank Bleach Works (20)	OU	Medium - long	2.85	-	5,500	7,250	Former bleach works site. The site is likely to have limited market attractiveness at present given a number of development constraints. Site has a Certificate of Lawfulness for B2 use.
Chorley East	-	-	-	-	-	-	-	-
Chorley West	-	-	-	-	-	-	-	-
Preston City Centre	-	-	-	-	-	-	-	-
Preston Inner Area	-	-	-	-	-	-	-	-
Preston Western Suburbs	-	-	-	-	-	-	-	-
Preston Eastern Suburbs	-	-	-	-	-	-	-	-

Sub Area	Site	Classification	Availability (years)	Area Available for Dev (Ha)	Office	Manu. B1c/B2	W & D B8	Comments
Preston Rural	-	-	-	-	-	-	-	-
Leyland and Farrington	Moss Side Test Track	MU	Medium - long	3.933	5,244	5,244	6,555	Test Track has current poor business image due to its screened appearance and potential for of contamination. Comprehensive mixed use delivery of site and addressing constraints could enhance role within the employment hierarchy.
Lostock Hall, Bamber Bridge & Penwortham	-	-	-	-	-	-	-	-
Eastern Parishes	Samlesbury Aerodrome (SS33)	OS	-	142.96	-	-	-	Owner specific aviation related development. Net developable area likely to be considerably less given predominantly Green Belt location. This site is identified in a recent study commissioned by the North West Development Agency as a strategic site supporting a key sector of the economy including knowledge-based employment.
Western Parishes	Liverpool Road, Walmer Bridge (MU3)	MU	Immediate - short	2.79	3,720	3,720	4,650	Residential component has been completed but 2.79 ha of land for employment use remaining uncommitted.

Table 5.8: Overview of Qualitative Assessment – All Remaining Sites

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
Chorley Central	Highfield Industrial Estate (4)	GU	The site achieves a good score in market attractiveness terms. The site is occupied by a modern industrial estate, local roads are wide and not congested and access is very good. There is one building on the site in poor condition which has potential for redevelopment.	The site scores well in environmental sustainability and strategic planning terms. The site is located in an urban area close to public transport and has good footpaths to and within the site.	A modern employment/ commercial site. The only potential obvious redevelopment opportunity is one poor quality warehouse near to Aldi.
	George Street/ Clarence Street Estate Including Brunswick Mill (6)	OU	This small site is located near to the centre of Chorley and less than a mile from the A6. The site contains a mix of building types, conditions and uses and is fully occupied. Access and egress into the site is quite narrow and visibility appears constrained. The site achieves a moderate score in market attractiveness terms.	The site achieves a good score in environmental sustainability and strategic planning terms. The site is located within 500m of a public transport interchange. Pedestrian footpaths are present. The site is also within a few hundred metres of a safeguarded cycle route.	Site is fully occupied with employment and residential uses and has no potential for intensification.
	Apex House, Stump Lane (7)	OU	A small site which achieves an average score in market attractiveness terms. The site is functioning as an office centre and occupies a steeply sloping site. The site contains relatively old stock arranged in a somewhat awkward configuration.	The site is located within 500m of a public transport interchange and there are some footpaths on local roads. The site has some ability to improve economic activity as the surrounding area ranks highly for multiple deprivation and moderately in terms of economic activity. Overall the site scores moderate to good in sustainability and planning terms.	Occupied site with limited potential for redevelopment and reconfiguration to enable more intensive use.
	East Chorley Business Park (9)	GU	This site achieves a good score in market attractiveness terms. The site contains a number of modern buildings and a few older buildings in employment and commercial use. The local road network is somewhat congested, however, this centrally located site has very good local road frontage and good entrance and egress points.	This site achieves a good score in environmental sustainability and strategic planning terms. The site is well located in terms of public transport (Chorley Railway Station) and has good pedestrian footpaths. The site is located close to Chorley town centre.	Recently redeveloped employment area in good town centre location.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Moorfield Industrial Estate (10)	OS	This is a large employment site which is currently occupied by FDC Holdings. Buildings are relatively modern and are of good quality and condition. External areas and public areas are well maintained and there is good parking provision. The industrial part of the site appears to release an odour. There is a vacant remaining area to the rear of the site which would be suitable for expansion of existing occupiers. A site suggestion has been made for this site for housing and employment.	The site scores well in sustainability and planning terms being. Located within 500 m of a main bus route but not within 1 km of a transport interchange. There are good footpath and cycle links to the site in an area of moderate economic development and relatively high multiple deprivation	Opportunity for owner specific expansion.
	Yarrow Mill Industrial Estate (11)	OU	The site receives a reasonable score in market attractiveness terms. It is located less than a mile from a major road but local roads are narrow and access is poor. The warehouse brick building on site is of an average quality. There is also a period mill tower which is a positive feature of the site. The site is surrounded by residential uses. A site suggestion has been submitted for this site for housing.	The site has some ability improve the economic activity of the ward being located in an area of high multiple deprivation and average economic activity. There is a bus route near to the site and footpaths around the site but no cycle paths. Overall the site achieves a good score for environmental sustainability and strategic planning.	Owner aspiration to sell the site for residential development. However, site currently accommodates local employment uses and appears to be successful.
	Quarry Road Industrial Estate (12)	OU	The site is occupied by caravan storage and poor condition warehouses. The site scores averagely in market terms. It is close to the A6 but is accessed via a narrow residential road. The site adjoins residential and open space and has poor street frontage. A site suggestion has been made for this site for housing.	The site achieves a good score for environmental sustainability and strategic planning. The site is within 500 metres of a bus route and has good footpaths into it. The site is brownfield and within an urban area and ward ranked highly in multiple deprivation terms.	Site is currently used for caravan storage. The site could be redeveloped for employment-

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Telent Site (18)	GU	The Telent site achieves a good score in market attractiveness terms. This purpose built modern building has local road frontage and good quality parking, circulation, servicing routes and access/egress. The site adjoins residential, employment and open space uses.	The site scores averagely in sustainability and planning terms. The site is within an affluent, economically active area and its redevelopment would neither enhance nor detract from the environment as the site is already in active employment use.	Site is fully operational for Telent and has no obvious potential for intensification.
	Land at Park Mills Deighton Road (21)	OU	This small site is in operation as a textile finisher and contains a period brick building and modern office building. The site has some open space adjacent to it and is in a residential area. The site is 1 – 2 miles from a major road and local roads are moderate. The site achieves a moderate score in market attractiveness terms. A site suggestion has been submitted for this site for housing.	The site is located within 500 m of a main bus route and there are good footpaths into the site but no cycle routes. The site achieves a moderate to good score for sustainability and planning.	The site is in close proximity to a residential area. The owner has aspirations to relocate and sell the site for residential development.
	Duke Street Motors Site (22)	OU	The site contains a single storey brick warehouse and car park. The site achieves an average market attractiveness score for a variety of reasons. The site adjoins employment and residential uses but is not visible from any road frontage and is accessed via a cul-de-sac which is very narrow.	The site achieves a good planning and sustainability score primarily because of its location adjoining Chorley Town Centre - making it highly accessible to public transport.	Well located, small site with maintained buildings and hard surfacing currently used for vehicle maintenance.
	Standish Street (26)	GU	The site achieves a good score in market attractiveness terms. Local roads are congested, however, this site adjoins the town centre. It has good local road frontage and some major road frontage. The site is occupied by a range of employment uses and buildings range in condition.	The site achieves a good score in planning and sustainability terms being located in the town centre and close to public transport with footpaths (but no cycle paths) to the site. Certain policy objectives could be delivered if the old stock on site where redeveloped.	A well functioning, well located site. The majority of buildings are of a high quality but there may be some opportunity to redevelop those of poor quality.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Cowling Business Park, Tincklers Lane (28)	GU	The site scores moderate to good for market attractiveness. Local roads are wide and not heavily congested. The rear of the site has recently been redeveloped as new warehouses, the front of the site is an unattractive cement works. The site adjoins other employment and residential uses. The site is not visible from any road and is irregular in shape and slopes in parts.	The site scores moderate to good for sustainability and planning. The site scores averagely in terms of access to public transport and is located within an urban area although it is out of a centre. The site also has potential to improve economic activity in a ward where there is high multiple deprivation and moderate economic activity.	Rear of the site has recently been developed with high quality warehouses. The front of the site is a cement works – there would appear little potential for further development at this site unless the cement works were to close/ relocate in which case this part of the site could be promoted for a similar standard of accommodation as that at the rear of the site.
	Clover Road (29)	OU	The site contains a mix of modern sheds and modern brick warehouse buildings with a large hard surfaced area. The site has no road frontage and is accessed from a residential cul-de-sac. It is mainly for these reasons the site scores moderately in market attractiveness terms.	The site is within 500 metres of a bus route; however, there are no cycle or footpaths into the site. The site achieves a moderate score for environmental sustainability & strategic planning.	Well maintained site which appears to have little potential for intensification/ infilling development other than perhaps for the expansion of existing businesses.
	Chapel Lane Industrial Estate (30)	GU	The site achieves moderate to good score in market terms. Local roads are wide and not heavily congested and the site is within a mile of the A49. The quality of the site is split between the high quality Barron's half of the site and the more poorly maintained Alfa Engineering area.	The site achieves a good score in sustainability and planning terms. The site has some ability to delivery policy objectives being within an area of relatively high deprivation. There is a bus operating with 50 metres of the site and a railway station. The site is out of centre but still within urban area.	Part of the Barron's car park and extension to an existing outdoor sales area was a site allocated in the Local Plan Review as a site suitable for employment use. The expansion was allowed as the objective of the allocation was to facilitate employment generating uses and subsequent employment generation. The Barron's half of the site is modern high quality caravan related business. Alfa Engineering side of the site is poor quality depot which could be redeveloped to provide higher quality employment premises.
	Blainscough Works, Blainscough Lane/ Preston Road (32)	OU	Construction of much of this poorly maintained site appears to have ceased before completion. The quality of the local road is very poor and the site has no main road frontage. The site scores poorly in market attractiveness terms. A site suggestion has been submitted for this site for housing.	The site scores moderately in strategic planning and sustainability terms. The site is constrained in planning policy terms by countryside policies	Semi-built buildings in this hard to access site will likely have little market attractiveness potential.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Land at Wigan Road (33)	OU	The site achieves an average market attractiveness score - this small irregular site is free from policy constraints and within a mile of a main road. Although access into the site is good internal circulation and visibility from the road network is poor. A site suggestion has been submitted for this site for housing.	The site achieves moderate to good score in strategic planning and environmental terms. There are moderate footpaths leading to the site and the site is close to a bus corridor. The redevelopment of the site would enhance the view from the local road.	Small, irregular site of moderate quality.
	Euxton Mill, Dawber Lane (34)	OU	The site contains a disused mill building. Despite the sites adjacency to the A581 a moderate score for market attractiveness is achieved as the site is significantly constrained in terms of environmental policy being in the Green Belt. Visibility and access out of the site is also poor. A site suggestion has been submitted for this site for housing.	A moderate score is achieved for environmental and strategic planning criteria. There is significant potential to enhance the surrounding environmental quality of the local area by redeveloping this brownfield area, however, the site is outside an urban area.	Vacant mill which is currently for sale with poor road access but environmental policy constraints.
	Rear of 37 – 41 Wigan Road (35)	OU	The site scores moderately for market attractiveness being close to a major road but having no main road frontage. The buildings on site are of extremely low quality. The site is free from policy constraints and is surrounded by residential uses.	The site achieves a good score for strategic planning and environmental sustainability. The site is currently significantly underused and in poor condition and redevelopment of the site with good quality, higher density, employment accommodation would make more efficient use of this previously developed land.	Derelict/ semi-utilised buildings and overgrown land with no main road frontage.
	Chorley Business and Technology Park (36)	GU	The site in Euxton achieves a good market attractiveness score. Buildings are modern and of a high standard with good local roads, parking and servicing. The site has high visibility to a local road frontage and adjoins other employment and residential uses.	The site achieves a moderate to good environmental and planning score. However, the site represents no opportunities for infill and intensification.	Recently developed high quality technology park with a small area still under construction. The site has no obvious ability to further intensify.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Euxton Lane (40)	GU	The site is currently occupied by Runshaw college and XTON business park. Generally the site is well maintained, however, some buildings are in need of improvement. The site is across the railway line from Southern Commercial Buckshaw site. The site has very good road frontage and achieves a good score for market attractiveness.	The site achieves a good score for strategic planning and sustainability. This is influenced by a park and ride site near to the site and re-opening / refurbishment of the rail station proposed to be completed in March 2009 as part of the regeneration of the broader area which will further enhance the site's sustainability credentials.	College and business park with limited opportunities for infill.
	Market Street (48)	GU	The site adjoins and is highly visible from a main road and achieves a good market attractiveness score. Buildings are of an average quality and surrounding land uses are generally compatible. Access/ egress and parking are good although local roads appear to have fairly heavy traffic flows.	The site achieves a good score for strategic planning and environmental sustainability. This occupied site is previously developed land and is close to a train station.	Relatively large site with average quality buildings in a good location with very good frontage.
	Adlington South Business Village (49)	GU	This site contains both modern high quality employment and office development and also building stock in need of improvement. A good to very good score is achieved for market attractiveness. The site adjoins the A6 and has a very good road frontage.	The site achieves an moderate to good score for sustainability and planning despite its location outside of a centre. It is within an urban area and very close to a public transport interchange. The site is in an area ranked as within the top 5% most deprived wards on the indices of multiple deprivation therefore the redevelopment of parts of the site has the potential to deliver economic/ regeneration objectives.	Modern office/ employment development at the front of the site with older, poorer quality employment buildings to the rear. Potential to bring the whole site up to the same standard.
	Pincroft, Market Street (50)	GU	The site achieves a good market attractiveness score. It adjoins the A6 and road visibility is good. No site-specific policy constraints or flood risk identified for this moderately, irregular sized site occupied by Pincroft in a mix of building types.	A good ranking is awarded for this site influenced by its proximity to public transport and location with a deprived urban ward despite its location outside of any existing centre but still within an urban area.	Large site with single occupier – Pincroft.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Westhoughton Road (51)	OU	This adjoins the A6 road and contains a mix of buildings and employment uses. The site achieves a moderate score for market attractiveness partly due to its small size and narrow shape and the flood risk constraint on site. A site suggestion has been submitted for this site for housing.	This brownfield site scores well for environmental sustainability and planning in the main because of its proximity to public transport.	Well located, narrow site with very good road frontage currently occupied by a mix of uses with one vacant unit (showroom).
	Park Road (52)	MU	This small site is tucked behind other businesses from the main road and achieves only an moderate score for market attractiveness. Buildings on site are purpose built and of an moderate quality. The site is in close proximity to the marina.	This site achieves a good score for environmental sustainability as it is within walking distance of public transport and other facilities.	Operational employment site. Appears to be in high occupancy. Current opportunities for development likely to be limited to infill/intensification / future mixed use development.
	Grimeford Industrial Estate (54)	OU	This site achieves an average score for market attractiveness reflecting the poor condition of parts of this operational employment site and its relatively isolated location in the Green Belt, despite its adjacency the M61 motorway (it is not accessible from the motorway in this location) and location within 1 mile of a major road.	The site achieves a poor to average score for sustainability as it is inaccessible by public transport and located outside of an urban area.	Operational employment site that appears to be in high occupancy. Current opportunities for development likely to be limited to infill/intensification.
	Swansea Lane (57)	OU	Car sales yard which scores moderately in market attractiveness terms. The site fronts a main road but is small and sloping. There is a flood risk on this site.	The site scores moderate to good in sustainability and planning term. Despite the sites broadly residential location the site is in an urban area, near to a bus route and has good pedestrian footpaths and cycleways.	Car sales yard and office. In the long term site could potentially be redeveloped for employment development.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Swansea Mill, Mill Lane (58)	OU	There is a flood risk on this site which is located in a broadly residential area off the A6 road (the site is not visible from the A6). These industrial buildings appear to be fully occupied. The site scores average to good in market attractiveness terms. A site suggestion has been submitted for this site for housing.	The site scores moderate to good in sustainability and planning term. The site is in an urban area, near to a bus route and has good pedestrian footpaths and cycleways.	Operating purpose built industrial buildings with no capacity for intensification.
	Waterhouse Green, Rear of Chorley Old Road (59)	OU	The site scores averagely in market attractiveness terms. The site is generally poorly maintained and is subject to flood risk category 2 - 3. The site is within a mile of a major road and surrounded by residential uses.	The site scores averagely in sustainability and planning terms being located outside of an urban area and away from public transport.	Low quality site with a mix of building types and uses. Site is poorly maintained and there is potential for infill development in undeveloped areas of the site. Visually the site would benefit from redevelopment.
	Land off Chorley Old Road (60)	O	This small, steeply sloping, poorly maintained site scores poorly against a number of market attractiveness indicators. The site also has limited accessibility.	The site is outside of an urban area and not accessible by public transport, however, its brownfield nature and location in an area in need of economic investment means that overall it scores poor to averagely in sustainability and planning terms.	Generally poor quality site given its size, topography, poor access and out of centre location.
	Kem Mill, Kem Mill Lane (61)	OU	This site has some visibility to a local road. Buildings on site are of an average quality and appear to be operating well. There is a flood risk on site (category 2 and 3). The site is within a mile of a main road overall the site scores moderately in market attractiveness terms. A site suggestion has been submitted for this site for housing.	The site is within an urban area and not accessible by public transport. The site is not within an area in need of economic investment as it already an affluent area.	Average quality site with little left over space for intensification. Access to the site is restricted due to steeply sloping narrow roads.
	Preston Road (63)	OU	The site achieves a good score in market attractiveness terms - it adjoins a major road and residential uses and is currently in operation and a caravan sales yard.	The site achieves an average score in strategic planning and sustainability terms. The site is on a bus route and has footpaths along the main road; however it is completely outside of a defined urban area.	Caravan sales yard. Site could be redeveloped to provide more intensive employment use.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
Chorley East	Harpers Lane (68)	OU	The site achieves a moderate to good market attractiveness score. This well maintained site is surrounded by predominately residential uses with very good visibility onto local roads.	The site achieves a moderate score for sustainability and planning. The site is outside of a centre but is still within an urban area and there is a bus stop adjacent to the site.	Period building occupied by Initial Washrooms Laundry solutions. Former laundry, it is understood operations on site have ceased since the initial site visit.
	Briercliffe Road (69)	GU	The site scores reasonably well in market terms being close to other employment uses and currently in operation and moderately maintained. However access to the site is poor off a residential street and visibility is limited to local roads only even though the site is reasonably near to the A6.	The site achieves a good score for planning and sustainability. A bus service operates with 500 metres of the site and the site is within walking distance of Chorley train Station. The area is within an area ranked as deprived on the indices of multiple deprivation.	Site has no potential for intensification. Current occupier is Cavensidish Upholstery. Potentially site could be clustered with site 16 and site 27 to create large redevelopment site in the longer term.
	Railway Road (64)	GU	This site achieves a good market attractiveness score being over approximately 5ha in size with visibility onto two local (somewhat congested) roads. The site appears to be fully occupied with a range of uses and building types but some buildings fronting the street are in need of maintenance and visual improvement. A site suggestion has been made for this site for employment and leisure.	An average environmental sustainability and strategic planning score is achieved for this site. The site is located within an urban area and is accessible by bus. There is an environmental improvement policy allocation in the Chorley Local Plan affecting the northern boundary of the site therefore environmental improvements in this location would contribute to achieving policy goals.	Medium/ large site with no vacancies. Site is currently mainly occupied by a timber yard with some smaller uses. Extant planning permission exists for B1 development over approximately 2 hectares.
	Gregson Lane Industrial Estate (65)	OU	The site scores moderately in market attractiveness terms. The site is accessed via a residential road, is outside of an urban area and 1 – 2 miles from a main road. Buildings on this operating timber yard appear well used and are in moderate condition. The site is within the settlement area of Gregson Lane where LP policies seek to limit development to infill or that which meets a particular local need. The site is regular, flat and free from flood risk and access and internal circulation is good.	The site scores poorly in strategic planning and environmental sustainability terms. It is previously developed land but is located outside of the urban area and in a fairly inaccessible location in public transport terms.	Timber yard in full occupation – current opportunities very limited to infilling existing site only.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
Chorley West	Rear of Carrington Centre (42)	MU	The site scores moderately to good for market attractiveness. The front of the Carrington Centre (not part of this site) appears to be operating successfully as a business and retail centre. Workshops and buildings in the rear of the site appear reasonably well maintained although some improvements could be made – particularly to road surfaces. Site access is good. A site suggestion has been submitted on this site for housing and employment.	The site scores moderately to good for sustainability and planning. The site is within a defined urban area but within an area well served by public transport. There is potential to improve the Carrington Centre as a whole and the economic activity of the boarder area by making more of this rear part of the site.	There are a few vacant units and opportunities for improved maintenance and intensification in the rear part of the Carrington Centre. Possible opportunity for mixed-use development.
	Grove Mill (43)	OU	The site is occupied by a number of uses including retail, office and leisure; the largest occupier on the site is 'Bygone Times Antiques'. The site only has one access point despite the wide variety of occupiers and has limited visibility. Overall, it scores moderately in market attractiveness terms. A site suggestion has been submitted on this site for housing and employment.	The site achieves a moderate to good score in environmental sustainability and strategic planning terms. The road adjacent to the site has a bus route running along it and continuous footpaths. The appearance of the site could be significantly improved.	A mix of users operate in these buildings of varying quality and maintenance.
	Sagar House, Langton Brow (44)	GU	This locally listed building (concrete vertical form emphasised by cladding) is set back from the main road with a good access and internal circulation route. The site achieves a good score in market attractiveness terms. Site access is good. A site suggestion has been submitted on this site for housing and employment.	Being located outside of a defined centre but within an urban area the site achieves a moderate to good score in environmental sustainability and strategic planning terms. A bus route and continuous footpath can be found along the road which the site is accessed from.	Purpose built office complex in large well maintained grounds formerly operating as Pontins headquarters.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Towngate Works (45)	OU	The site achieves a moderate score in market attractiveness terms. Access to the site is via a country lane. However, the site appears to be operating well in a mix of buildings which are quite well maintained and appears free from major constraints in policy, contamination or flooding terms.	The site is located outside a defined urban area and is not easily accessible via public transport; although the intensity of user on the site could be increased the site has little potential to contribute to economic regeneration of the immediate area as the ward is already relatively affluent.	Potential opportunities for expansion/ intensification/ infilling in this moderately maintained employment area located to the rear of a residential street outside of any urban area.
	Transport Depot, Rufford Road Mawdesley (66)	OU	The site achieves a moderate score for market attractiveness. Access into the site is good but the site is more than two miles from any major road. There are also some policy limitations associated with this site.	The site only achieves a poor to moderate score for planning and sustainability being located outside of a defined urban area, with no nearby public transport, footpaths or cycle links to the site. The site is in the Green Belt.	Former transport depot with modern shed with a large hard standing area and open space to the rear. The site has the potential for immediate redevelopment given that is currently not in use, however, the impact on the Green Belt will be a constraining factor to redevelopment.
Preston City Centre	Frenchwood Knoll/ Selborne Street (48)	OU	The site achieves a reasonable market attractiveness score; however half of the site has been redeveloped for residential development. Access to the site is via good local roads. Road frontage to the site is good and the employment building is an attractive refurbished period office building occupied by Virgin Media. The site is not exposed to significant environmental constraints and office/ administrative uses are generally compatible with residential character of the surrounding area.	The site achieves a good to very good sustainability and strategic planning score. The high score is influenced by the site's previously developed land status, good bus routes operating within 500 metres from the site, continuous footpaths, position of the site the edge of Preston City Centre and potential for the site to contribute to economic activity and address multiple deprivation in the ward.	Approximately half of the site has been redeveloped for non employment uses. The remainder of site is occupied by Virgin Media in a period refurbished building. There is no significant potential for infill/ intensification of existing premises.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Unicentre, Derby Street (49)	GU	The site is occupied by a purpose built office building which achieves a good market attractiveness score. The site is accessed via good quality local roads. This circa 1970s office building has been recently refurbished which has improved its business image. It is surrounded by other similar employment uses and does not have any major environmental constraints.	The site achieves a good to very good strategic planning and sustainability score due to its location within Preston City Centre, in close proximity to a public transport interchange and city services. The site also has potential to improve economic activity in the ward where there is currently low economic activity and high multiple deprivation.	Circa 1960s tall office building currently marketed and recently refurbished. The Preston Tithebarn Regeneration Area masterplan highlights this site as being able to provide a car park and community uses in the long term as part of wider mixed use development within the City Centre.
	Ormskirk Road (50)	MU	The site achieves an average market attractiveness score despite its City Centre location. However, this is mainly due to the extremely poor building portfolio on site which is outdated and provides substandard office and retail accommodation.	The site achieves a very good sustainability score due to its City Centre location in close proximity to a public transport interchange and major services and facilities. However, the site is currently significantly underused and redevelopment of the site with good quality, higher density employment/ mixed use accommodation would make more efficient use of previously developed land.	The Preston Tithebarn Regeneration Area masterplan earmarks this site to provide office/workshop accommodation as part of wider mixed use development.
	Trinity Place (51)	O	-	-	The site has recently been redeveloped for student accommodation therefore the site is unlikely to come forward for development in the long term.
	Trinity Student Village, Great Shaw Street (52)	O	-	-	Large site recently redeveloped for residential/student accommodation. It is unlikely to come forward for development in the long term.
	County Offices, East Cliff (53)	OU/OS	The site achieves a moderate market attractiveness score. Whilst the period office building is attractive, the office stock is of a poor standard. In addition, access to the site is extremely poor and the site has very restricted local road frontage. Whilst the site has no major environmental policy constraints, it is unlikely to attract key target sectors in this isolated location adjoining a railway line.	The site achieves a good sustainability score due to its previously developed land status and proximity to Preston Railway Station. However, the site is unable to significantly contribute to economic development within the area given that it is an existing employment site without significant additional capacity to provide further employment/ expansion.	Substandard access to the site. Site contains attractive period buildings and poor quality additions.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Winckley Square/ Chapel Street (54)	GU	This site achieves a good market attractiveness score due to its good building portfolio and location within Preston City Centre. It has two local road frontages and appears to be fully occupied with no known owner aspirations for non employment uses. There are no major environmental policy constraints on this site.	The site achieves a good sustainability and strategic planning score due to its City Centre location in close proximity to Preston's public transport facilities and other services. The buildings are of good quality but there appears to be no scope to intensify/infill.	Good quality office and commercial/residential buildings with no obvious current potential for intensification.
	Fox Street/ Corporation Street/ Surgeon's Court (55)	MU	This City Centre site has good local road frontage. However, it is occupied by a surface car park and two storey terraced buildings, currently used as offices. Overall, the site is poorly maintained and does not portray a good business image which affects its market attractiveness score. The site is subject to Policy SS4 of the Preston Local Plan which supports development for offices (B1), educational facilities and small scale retail.	The site achieves a good to very good sustainability and strategic planning score due to its City Centre location and ability through redevelopment to significantly enhance environmental quality and contribute toward economic development.	Redevelopment is likely to attract mixed use development (higher value occupiers). Existing occupiers may need to be relocated.
	St Joseph's Hospital, Mount Street (57)	MU	The site achieves a moderate score despite its two local road frontages and attractive period buildings dominating the site. This is primarily due to the site being marketed for non employment uses and environmental constraints including Grade II listed status and poor internal access and parking.	The site achieves a good to very good sustainability and strategic planning score due to its City Centre location however it is unlikely to be promoted for wholly employment development	Owner aspirations for residential led development, for which it is currently being marketed. Potential opportunity for mixed use development.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Site of former St Mary's Church, Friargate Brow (58)	OU	This is a small City Centre site which adjoins the proposed Central Business District. It is currently used as a surface car park. The site achieves a moderate score influenced by its 'backland' location, limited local road frontage but no significant environmental constraints. Owner aspirations for the site are unknown and the site is not being marketed. Policy SS10 of the adopted Local Plan allows for a mix of uses to be provided on site including Business (B1), residential (C3), non residential institutions, leisure facilities and a short stay surface car park.	The site is in a sustainable location and is able through development to contribute toward increasing economic activity within the area. The site overall achieves a good sustainability and strategic planning score and has potential through development to enhance environmental quality.	Used as a commercial car park. Redevelopment could attract higher end occupiers however owner aspirations for the site are unknown.
	Hope Street/ Corporation Street (59)	OU	A small car park (in private use) within Preston City Centre. The site achieves a moderate market attractiveness score given that the small group of buildings within the site are of very poor quality and do not portray a positive business image. Whilst the site has very good local road frontage, it is distanced from any major arterial routes. The site does not have any major environmental constraints however there are some mature tree specimens along the perimeter of the site which may need protection/ retention.	The site's good sustainability and strategic planning score is influenced by its City Centre location and the ability through development to contribute toward economic activity and development within this area.	Small site currently used as private car park. Owner aspirations unknown but redevelopment for employment use could attract higher value occupiers.
	Church Street/ Pole Street (61)	MU	Despite the site achieving a moderate to good market attractiveness score, this site has recently been redeveloped for mixed use development which is residential led and contains a small number of ground floor commercial units, some of which remain vacant.	The site is within Preston City Centre and whilst it achieves a good sustainability and strategic planning score, the site has recently been redeveloped and is unlikely to contribute toward further economic development.	Recently redeveloped with residential led development with small number of commercial units on the ground floor. No further capacity for infill/ intensification.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Walker Street (62)	GU	The site contains older stock office buildings and a surface car park. The site achieves a good market attractiveness score. Despite the buildings' age (circa 1960s building), they appear well maintained and have very good local road frontage. In addition, the site is not subject to significant environment constraints. Policy SS21 of the adopted Local Plan suggests several uses on this site including a car park and B1 offices.	The site achieves a good to very good sustainability and strategic planning score, primarily due to its City Centre location and ability through development (over the surface car park) to contribute toward economic activity and development in the ward.	Possible redevelopment opportunity provided by car park to accommodate uses above, including B1 offices.
	Winckley Square (SW)/ East Cliff (65)	GU	This is an established group of mixed use buildings comprising of retail, office and residential and it is within Preston City Centre. The site achieves a good market attractiveness score, primarily due to good local road frontage and attractive business image. However, there is limited access to the site and heavy reliance on on-street parking due to older stock buildings.	Similarly, the site achieves a good sustainability and strategic planning score, due to its city centre location. However the site does not have additional capacity to provide additional employment development as the site has reached its full capacity.	Well located site with a mix of uses including modern residential and period attractive townhouses occupied predominantly as offices already developed to capacity.
	Winckley Square (SE) Cross Street (66)	GU	An established mixed use site which achieves a good market attractiveness score, primarily influenced by its very good local road frontage, overall good building portfolio (but with some buildings requiring upgrade) and low vacancy rate. However, there is limited on site parking and access to the site is restricted.	The site is within Preston City Centre and achieves a good sustainability and strategic planning score.	No site capacity to provide additional buildings however redevelopment of poor quality buildings (long term) could increase density on part of the site.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Princes Building, Lancaster Road (67)	MU	This City Centre site achieves a moderate market attractiveness score, affected by unknown owner aspirations and distance from major arterial routes. However, the site contains attractive period buildings which appear to be well used and have a good local road frontage. Policy SS8 of the adopted Local Plan supports the development of the site for a wide range of uses including retail, offices, food and drink, hotel, residential and leisure. There are no significant environmental constraints identified on site.	The site achieves a good to very good sustainability and strategic planning score due to its City Centre location, proximity to good public transport links and City Centre services. A large part of the site remains undeveloped and provides an opportunity to contribute toward economic development and increased economic activity if developed.	Adjoins open space which has potential to be developed for mixed use. Historic setting is main constraint therefore any future development would need to respond to the attractive historic environment.
	Kaymar Industrial Estate (68)	OU	This is a well established industrial site, in multiple occupancy which achieves a moderate score. The site is within the City Centre and adjoins a major arterial route which provides good access to the site. However the quality of buildings often appear outdated. There are a number of vacant units which are marketed. However, the site appears to have no major environmental policy constraints and is attractive to start up businesses.	The site, like a number of other City Centre sites, achieves a good to very good sustainability and strategic planning score due to its city centre location in close proximity to good public transport links and services. The site also represents opportunities for limited infill and intensification. Any major redevelopment could significantly enhance environmental quality and contribute toward economic activity.	Site provides essential low cost accommodation for lower end users. Long term redevelopment could attract higher value occupiers. Owner aspirations unknown.
Preston Inner Areas	Fire Station, Blackpool Road (4)	OU	The site contains a purpose built fire station fronting onto a local road. It achieves a moderate score influenced by average building portfolio. The site is in a prominent location.	The fire station site achieves a good sustainability and strategic planning score given its previously developed land status and ability through redevelopment or change of use to contribute toward economic development.	Owner aspirations to relocate Fire Station into Hartington Road in Riversway (outline planning application pending consideration).

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Skeffington Road/ Castleton Road (5)	OU	This site achieves an average market attractiveness score. Part of the site has recently been completed with residential development with the remainder used for haulage and as a car servicing centre. Its score is influenced by the poor road quality and substandard access to the site (particularly for larger vehicles). In addition, the building portfolio is outdated however, the employment parts of the site appear to be fully occupied and the site has very good local road frontage with minimal environmental constraints (apart from railway line adjoining the site which could raise issues relating to noise and vibration) and some contamination.	The site achieves a moderate sustainability and strategic planning score. This is due to limited public transport provision near to the site and also limited potential to enhance environmental quality through redevelopment given that the quality of the existing building is good.	Around half of the site has recently been redeveloped for residential. Remainder of the site could be redeveloped however owner aspirations are unknown and potential contamination would likely require appropriate remediation.
	The Brick House (6)	O	This site is in a 'backland' location with no road frontage and very poor building portfolio. In addition, it adjoins residential uses and is likely to be contaminated. For these reasons, the site achieves a poor market attractiveness score.	The site achieves a moderate sustainability and strategic planning score. Whilst the site is previously developed land, it is in an out of centre location with poor public transport and footpath links. In addition, it's secluded; 'backland' location means that comprehensive redevelopment is unlikely to have a significant positive impact on the overall street scene and environment.	Existing employment site most likely to be redeveloped for residential led development if redeveloped. Owner aspirations are unknown and site is likely to be significantly contaminated.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	25-109 Garstang Road (14)	MU	<p>An established employment site containing a mix of uses and operators including NHS, St John's Ambulance, National Probation Office and small warehouse units. The site has a mixed building portfolio; generally, the buildings are of older stock but well maintained. The northern part of the site also contains some residential uses. Overall, the site achieves a average market attractiveness score influenced by its high occupancy rate and good local road frontage. However the site is in multiple ownership and owner aspirations are unknown.</p>	<p>Through redevelopment, the site has potential to significantly improve the quality of the environment, make more efficient use of the land and also contribute toward economic development and activity within the area. For these reasons, the site achieves a good strategic planning score. Whilst there are limited public transport facilities near to the site, redevelopment of the site represents opportunities to introduce improved footpaths and cycle links which could enhance its sustainability performance.</p>	<p>Site contains a mix of uses in a wide variety of building styles and quality. Some parts of the site likely to come forward for redevelopment with mixed use offering potential to enhance contribution to the local environment but owner aspirations are unknown.</p>
	Moor Lane/ Cragg's Row (31)	OU	<p>This site fronts onto Moor Lane. A large part of the site has been redeveloped for residential development however a small part continues to provide depot accommodation for United Utilities and two other smaller warehouse occupiers. The site achieves a moderate market attractiveness score given that majority of the site has been redeveloped and that the remaining employment buildings are of poor quality. However, the site has a local road frontage and is not affected by major environmental policy constraints. Owner aspirations for the employment part of the site are unknown however it is likely that there will be further pressure for residential led redevelopment.</p>	<p>The site achieves a good to very good sustainability and strategic planning score due to its location close to good public transport links, its location adjacent to the City Centre and potential through high quality redevelopment (of remainder of the employment site) for high quality employment uses to increase economic activity and development within the ward.</p>	<p>Northern part of site recently redeveloped for residential development. Owner aspirations for remainder of site (occupied by United Utilities and two vacant warehouses) are unknown.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Council Depot, Argyll Road (32)	OU	This site is used as a bus depot and contains older employment buildings. The site achieves an average market attractiveness score due to the generally poor building portfolio. Its score is further affected by sensitive adjoining land uses (residential) and the possibility of contamination. Owner aspirations are unknown.	The site is previously developed land. It adjoins a bus route and is within 1 kilometre of Preston Railway Station. Development/ redevelopment would significantly enhance environmental quality. For these reasons, the site achieves a good to very good sustainability and strategic planning score.	In current active use as a bus depot. Owner aspirations unknown.
	Moor Lane/ Victoria Street (33)	OU	This small discordant site is located approximately 1 kilometre from a major arterial route. It achieves an average market attractiveness score, influenced by its often poor quality buildings, unknown owner aspirations and limited vehicular access and on site parking.	The site achieves a very good sustainability and strategic planning score due largely to its very good proximity to a public transport interchange and previously developed land status.	Small mixed use site occupied by a pub, printer workshop and a period office building. Owner aspirations are unknown. Site is in poor maintenance and buildings generally of poor quality but is fully occupied.
	North Road B/ Kent Street (34)	GU	An established employment site containing a mix of operators accommodated within older style warehouse and workshop units. The site achieves a good score, primarily due to its proximity to an arterial road, good site access and a positive business image attracting a wide mix of employment uses.	This previously developed site achieves a very good sustainability score due to its proximity to a transport interchange, good quality footpaths leading to the site.	The site appears to be in high occupancy. Opportunities for development are likely to be limited to infill/intensification or employment redevelopment in the long term.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Rye Street/ Canute Street (35)	OU	This site is an extension to the North Road B/ Kent Street site, however, it is small in size and contains very poor quality employment buildings and a group of terraced dwellings. One of the warehouse units was vacant at the time of survey. The site achieves an average market attractiveness score given that it is in close proximity to an arterial route and that there are no major environmental policy constraints on site apart from likely contamination. However, the site contains sensitive land uses and owner aspirations for the site are unknown.	The site achieves a high sustainability score due to its urban location in close proximity to good public transport links and Preston City Centre. It also could represent an opportunity through comprehensive redevelopment to enhance environmental quality and improve economic activity in the area. However, its present form, it is likely to attract only lower end users and start up businesses.	Site generally occupied. It could represent an opportunity for comprehensive redevelopment in the longer term.
	Eastham Industrial Estate/ Aqueduct Street (36)	OU	A medium size established employment site containing a mix of warehouse/workshop units ranging in size from small linked units to medium size stand alone warehouses. The site has a positive business image, is in high occupancy and is not subject to significant environmental constraints. However, its market attractiveness score is affected by poor road access, narrow internal circulation and unknown owner aspirations.	The site is within the urban area of Preston and in close proximity to the City Centre. It has good public transport and footpath links and through some infill and intensification is able to deliver economic development. For these reasons, the site achieves a good score against sustainability and strategic planning indicators.	Established employment site attracting lower end users. Some infill/intensification opportunities exist however owner aspirations are unknown.
	Deepdale Mill, Deepdale Mill Street (37)	OU	The site has been converted to provide an education establishment and achieves a moderate market attractiveness score due to poor access to the site and poor quality of existing buildings. However, the site is unlikely to be affected by major environmental constraints.	The site is previously developed land. It is currently occupied as a school which plays a significant social and economic role in the local Muslim community. Owner aspirations are to relocate to a bespoke site which may release this site for alternative uses which could increase economic activity within the ward.	A site converted to allow occupation by an educational establishment. Long term owner aspiration to relocate from the site.
	Tennyson Road Mill (38)	OU	-	-	Site redeveloped for residential development therefore it is unlikely to come forward for development in the long term.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Land at New Hall Lane/ St. Mary's Street (39)	OU	An established employment site containing commercial terraces along New Hall Lane and a circa 1960s office building within the site. In addition, the site contains an attractive period stone church (St Mary's) which is currently vacant. The site achieves a moderate to good market attractiveness score due to its proximity to an arterial road, good local road access and no obvious major environmental constraints.	The site is previously developed land with good links to bus services. Intensification and development of parts of the site could significantly enhance environmental quality and also help to address the low economic activity and multiple deprivation within the ward. The site for these reasons achieves a good to very good sustainability and strategic planning score.	Established mixed use site containing a vacant church which could come forward for office use. Remainder of site likely to allow limited intensification or comprehensive long term redevelopment.
	Ribbleton Street/ Deepdale Road (40)	OU	A mixed use site fronting onto Ribbleton Street and Deepdale Road, it contains a row of attractive period townhouses within the southern part of the site, currently in mixed use (dental surgery, medical centre, some small offices and residential) and warehouse units within the northern part. The site appears to be fully occupied and popular however business image is mixed with the attractive townhouses improving its score. Site access and parking/on site turning is extremely limited.	The site achieves a good sustainability and strategic planning score, due in part to its previously developed land status. Redevelopment of the warehouses for new employment uses within the northern part of the site could deliver further economic activity and address multiple deprivation within this area, as well as enhance local environmental quality.	There is no scope for additional development however redevelopment of the northern part of the site would significantly enhance the street scene.
	Ribbleton Lane/ Longworth Street (41)	OU	An older employment site currently in multiple occupancy however not used to its full capacity. The site achieves an average market attractiveness score. Whilst it has good local road frontage, the buildings are set back from the road and screened from the street scene by a high brick wall limiting visibility. The buildings are poorly maintained and of older stock but appear to be attractive to a mix of smaller businesses.	The site achieves a good strategic planning and sustainability score due to its previously developed land status and the ability through infill/ intensification or comprehensive redevelopment to contribute to economic development and help address low economic activity and high multiple deprivation in the ward.	Older employment site occupied by small businesses (lower end users). Some infill and intensification possible in the short-medium term.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Waverley Park Mill (42)	OS	The site contains a retail building along the front and open yard storage and warehouse to the rear. The site has a good local road frontage and has a positive business image. Whilst the buildings are outdated, they appear to be well maintained and are used to their full capacity. Owner aspirations are unknown and whilst there are sensitive land uses nearby, there do not appear to be major development constraints.	The site achieves a good sustainability and strategic planning score due to its previously developed land status and location within an area of low economic activity and high multiple deprivation. Whilst the site has ability to provide some infill and intensification, it is likely to be owner specific.	Site occupied by Thompson Buildbase (timber and building supplies). The rear part of site, (currently used as open storage) could provide owner specific development to allow for expansion.
	Deepdale Mill Street (43)	OU	This small employment site contains two employment buildings fronting onto Deepdale Mill Street. The site is occupied by an electrical supplies workshop and an auto workshop. The buildings are older warehouses of brick construction and are fully occupied. They have very good local road frontage and moderate on site turning, servicing and parking. However, the site's average market attractiveness score is influenced by unknown owner aspirations and the small size of the site.	The site achieves a good sustainability and strategic planning score, primarily due to its previously developed land status.	Small occupied employment site. Very small current opportunity for infill/intensification.
	Crook Street/ Campbell Street (45)	OU	Part of a wider industrial land cluster, this is a medium size site which contains older stock warehousing and other employment units in a range of architectural styles and quality. Overall, the site is poorly maintained and tends to attract lower end occupiers in this location. However vacancy rates are low and there appears to be no major environmental constraints. The site has good local road frontage however local roads are narrow and provide substandard access for larger vehicles which affect its market attractiveness score.	The site is previously developed land and contributes toward economic activity within the ward. Some intensification or major redevelopment of the area could significantly enhance environmental quality and help to address multiple deprivation and the low economic activity in the area.	Established commercial/ employment site with small current opportunities for infill/intensification.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Ribbleton Lane/ New Hall Lane (46)	GU	<p>This is an established employment site which also contains a wide mix of businesses accommodated in a mix of building styles. The site is generally poorly maintained and is discordant however occupancy rates appear high. Some of the older, attractive period buildings have recently been restored and brought back into use including refurbishment and new development to accommodate Police Headquarters and adaptive reuse of an old mill building to a hotel. The site adjoins a major arterial route and has a very good main and local road frontage. However, access is poor and some improvements are required to the internal circulation roads to provide for larger vehicles. The site attracts start up businesses and lower end occupiers. The site also contains several listed buildings including attractive period mill buildings and chimney stacks. Under recent Site suggestions, the site has been put forward for residential development.</p>	<p>The site is previously developed land and receives a reasonable environmental sustainability score. Comprehensive redevelopment and restoration of the site would significantly enhance environmental quality and help to address the low economic activity and high multiple deprivation within the area.</p>	<p>Site is varied in character with a mix of building quality including older attractive buildings which have been refurbished. Some poorer quality stock but site generally appears popular.</p>
	Blackpool Road/ West View (47)	OU	<p>A mixed use site containing a large storage and distribution facility for SPAR and car showrooms. The site achieves a moderate to good market attractiveness score due to high occupancy, attractive appearance of the car showrooms along Blackpool Road and very good main road frontage.</p>	<p>The site is previously developed land in current active use and has access to some bus services nearby. However it is in an out of centre location where redevelopment of the site is unlikely to deliver further economic activity. There are increasing pressures to redevelop the rear part of the site for non employment uses.</p>	<p>Site occupied by SPAR Distribution Centre and two car showrooms (BMW and Vauxhall). Owner aspirations for Spar site to deliver mixed use development to attract higher value occupiers.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Tulketh Brow/ Fylde Road (70)	OU	A small mixed use site containing a furniture store along Fylde Road and five small warehouse units to the rear. One of the units is occupied by Travis Perkins and two other units were vacant and being marketed at the time of the survey. The site contains a good quality building portfolio with the furniture store along the main road providing an attractive road frontage. However, internal vehicular access and servicing is narrow which affects its overall score.	The site is previously developed land in current active use. There is no opportunity for obvious opportunity for infill/intensification and the ability to further contribute to economic activity in the area is limited.	Retail buildings along the street frontage recently developed. Rear part of site occupied by Travis Perkins and two warehouse units. Owner aspirations are unknown however there is limited potential to intensify the use of the site to deliver additional employment floorspace.
	Depot, Shelley Road/ Old Lancaster Lane (71)	OS/OU	A small site occupied by ATS Tyres, the site achieves an average market attractiveness score. The building is well maintained and the facility provides moderate on site parking. However, owner aspirations are unknown.	The site is within an urban location but outside of Preston City Centre. It represents an opportunity for limited infill/intensification within the undeveloped parts of the site. In overall, terms it could attract further economic activity within the ward and enhance environmental quality through redevelopment.	Owner aspirations unknown. Site occupied by ATS Tyres with opportunity to expand (owner specific). Redevelopment of the site could bring forward other employment or non employment uses. There appears to be no major environmental constraints.
	Shelley Road (72)	OU	An established employment site (previously a mill), it is in multiple occupancy and provides accommodation for a wide mix of occupiers. The site achieves a good market attractiveness score due to its large size, good local road frontage and low vacancy rates. However, there are pressures to lose parts of the site to non employment uses, most recently through Site suggestions where the site has been put forward for residential development.	The site is previously developed land in current active use and there are opportunities to undertake infill and intensification on this site which could improve economic activity and also enhance environmental quality.	Eastern part of the site developed for residential. Likely ongoing pressure to release further land for residential development. Opportunities for infill and intensification on the remainder of the site.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Tulketh Mill (73)	GU	A very attractive medium size site containing a period mill building, currently occupied as offices by Car Phone Warehouse. Some smaller outbuildings are individually occupied as car workshops or are vacant but actively marketed. The site achieves a good market attractiveness score due to the attractive appearance and good maintenance of the key mill building and limited number of environmental constraints. The site has very good local road frontage and there is also moderate parking and servicing on site.	The site achieves a good strategic planning and sustainability score due to its previously developed land status, location within an urban area and its potential to deliver further economic activity within the ward by bringing forward the smaller, ancillary buildings for employment use through redevelopment/refurbishment.	Site occupied by an attractive, refurbished period mill building and smaller outbuildings. Site presents additional opportunities for small infill and intensification.
	Lane Ends Trading Estate (74)	OU	-	-	Majority of site redeveloped for residential. The remainder of the site is occupied by a warehouse (vacant) which is likely to come under pressure for residential-led development.
	Oxheys Industrial Estate (75)	OU	An older industrial, medium size site in multiple occupancy, it achieves an average score based on poor local road access and old building stock that would not be attractive to key target sectors or higher value occupiers. It's out of centre location and restricted local road frontage further affect its market attractiveness score. Whilst it is not exposed to major environmental policy constraints, it adjoins residential uses.	The site also achieves an average sustainability and strategic planning score. Whilst the site is previously developed land, it is unable to significantly improve environmental quality given that it is discreet within the street scene. Its sustainability score is affected by poor public transport links to the site and it's out of centre location. Very limited intensification can likely occur on site.	Southern part of the site contains residential terraces. The remainder of the site is in employment use, occupied by a mix of smaller businesses. Some potential for infill/intensification however site caters well for lower end users.
	Cattle Market (76)	OU	-	-	Site redeveloped for residential development therefore it is unlikely to come forward for development in the long term.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Starkie Industrial Estate/ Brierley Street (77)	OU	A medium size established employment site, it achieves an average market attractiveness score due to outdated warehouse and industrial buildings. Whilst the site appears to be fully occupied, the buildings are poorly maintained and do not provide a modern business image. However, the site appears to be attractive to lower end users. The site is surrounded by residential dwellings and other employment sites and has very good local road frontage.	The site achieves an average sustainability and strategic planning score, primarily due to the site's poor access to public transport and out of centre location. However the site could provide an opportunity to enhance environmental quality through redevelopment.	Older warehouse buildings occupied by small occupiers. Small potential for infill and intensification to assist existing businesses however comprehensive redevelopment of the site could include mixed uses able to attract higher value users.
	Croft Street/ Wellfield Road (80)	GU	This is a large mixed use site comprising of predominantly employment uses. It achieves a good market attractiveness score due to good site access, proximity to major arterial routes and no major environmental policy constraints. However, the overall building quality and image is poor and long term owner aspirations are unknown.	The site achieves a good to very good sustainability and strategic planning score, influenced by the site's previously developed land status and potential through redevelopment to generate significant economic activity and development.	Older employment site. Comprehensive redevelopment of the site could attract higher value occupiers in this sustainable location. Short term, the site is capable of some infill and intensification.
	Jubilee Trading Estate (81)	OU	This is an established industrial site occupied by a number of occupiers including Dexters Paint, car rentals and a scaffolding company. The site achieves an average market attractiveness score due to its large size, an apparent limited number of environmental constraints and proximity to an arterial road and very good local road frontage. However, the site adjoins residential uses to the south and the building portfolio is poor. Owner aspirations are unknown however the site has capacity to provide some further industrial development.	The site is relatively remote from good public transport links however there are continuous footpaths leading to the site. Whilst previously developed land, the site achieves a poor to average sustainability score. However, the site has capacity to accommodate additional industrial development which could increase economic activity and help to address high multiple deprivation within the ward.	Established employment site with high occupancy. Owner aspirations unknown however site has capacity to provide additional industrial floorspace as infill or intensification of established uses on around 0.2 hectares of undeveloped land.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Brunel Court, Ladywell Street (82)	OU	-	-	Site recently redeveloped for student accommodation and is therefore unlikely to come forward for development in the long term.
	Leighton Street (Gypsy site and adjacent land) (83)	OU	Half of the site has been redeveloped with student accommodation and the remainder is occupied as a Gypsy site. The site has a long local road frontage however the site ground levels are lower than the street. There are no significant environmental constraints on site and the site adjoins uses that are generally compatible with most employment uses. Owner aspirations for the remainder of the site are unknown and the site is not being marketed.	The site is previously developed land with good bus service and footpath links. It is also within Preston City Centre close to the City's services and facilities however the remainder of the site is unlikely to come forward for employment development in the long term and is therefore unable to contribute toward economic development.	Northern part of site recently redeveloped for student accommodation. Owner aspirations for the southern part of the site (Gypsy Site) are unknown.
	West Strand/ March Lane (84)	GU	An established employment site located adjacent to the Riversway, it contains both older warehouse units and a cluster of modern office buildings. The site overall achieves a good market attractiveness score influenced by the modern building stock and also by very good local road access and proximity to an arterial route. The site adjoins residential uses and other employment sites and has a medium risk of flooding (Category 2) which impacts on its score.	The site achieves a good to very good sustainability and strategic planning score, primarily due to the site's previously developed land status, proximity to good public transport links, edge of Preston City Centre location and ability through further redevelopment of older parts of the site to address low economic activity and multiple deprivation within the ward.	Established employment site. Vacant parts recently completed for office development within the western sector of the site. No further current obvious opportunities for development available [other than through (longer term) redevelopment].

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Greenbank Street/ Bond Street (85)	OU	This is a large, older industrial site located adjacent to other employment sites. The site's building portfolio is generally poor (most of the accommodation is in older period buildings which are poorly maintained). However, the site achieves a reasonable market attractiveness score due to its high occupancy, good local road frontage and popularity amongst smaller businesses. The site is not exposed to major environmental constraints however owner aspirations are unknown.	This large employment site receives a moderate environmental sustainability score. This score would be improved through comprehensive redevelopment which could accommodate higher end employment users in a sustainable location, close to Preston City's services and facilities.	Established industrial site in multiple occupancy. Unknown owner aspirations. Currently limited opportunities for intensification.
	Maudlands, Aqueduct Street (86)	OU	This site adjoins the Greenbank/ Bond Street site to the west. Due to its size and buildings being screened behind a tall front boundary brick wall, the market attractiveness score is moderate. Owner aspirations for the site are unknown however the site appears to be fully occupied.	The site is previously developed land with some access to bus services. It could represent an opportunity through redevelopment to significantly enhance environmental quality by improving its prominence along Aqueduct Street and to increase economic activity.	Employment site containing poorer quality warehouses and a period attractive Steam mill office building (appears to be in non employment use). Buildings generally appear well occupied. Redevelopment of the rear part of the site would enhance environmental quality.
Preston Western Suburbs	Hazelmere (County Fire Brigade HQ) (11)	OU/OS	The site is occupied by the County Fire Brigade. The site contains an attractive period headquarters building as well as later additions. Overall, the site achieves an average market attractiveness score influenced by the discordant appearance of the site with the modern buildings having an obtrusive effect on the attractive period building. However, the site has a very good main road frontage, good access to and within the site and is within 1 kilometre of a major arterial road. However, owner aspirations are unknown and the site is not being marketed.	The site is within an urban area but outside of a centre. There are some bus services that operate near to the site. Whilst the site is previously developed land, there are likely to be limited opportunities for enhancement to environmental quality through redevelopment given that the existing period building is an attractive feature along the street scene. There are limited infill/ intensification opportunities therefore the site is unable to significantly contribute toward economic development. For these reasons, the site achieves only an average sustainability and strategic planning score.	An attractive fire brigade building with a discordant modern extension. Owner aspirations are unknown. The site is unable to provide significant infill/ intensification opportunities.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Cottam Hall Brickworks (12)	GU	<p>An old brickwork site, it contains some small buildings and a large hardstanding area. Part of the site is currently being developed for a care home and day centre however a large part of the site remains undeveloped and is subject to a comprehensive Interim Planning Statement, published in June 2006 which sets out broad guidelines for mixed use development on this site and Cottam Local Centre. There are a number of environmental constraints on this site including Biological Heritage Area which needs to be protected as a Local Nature Reserve. Due to the proximity of residential uses to the site, it is likely that employment opportunities would be limited to office and light industry which will rely on access from Tom Benson Way. The site achieves a good market attractiveness score due to its proximity to main arterial roads, good road frontage and aspirations of the owners to deliver employment development on this site.</p>	<p>The site achieves a moderate to good sustainability and strategic planning score. Whilst the site is able to deliver economic activity within the area through development of the site, majority of the site is greenfield and there are currently limited public transport links to the site which affect its score. A Green Travel Plan and a Sustainability Plan should be considered to support any future development of the site to improve its score.</p>	<p>Estimated capacity to deliver approximately 2,770 sqm. of additional employment development over 0.69 hectares (pursuant to IPS). Specific owner aspirations are unknown and site has considerable environmental constraints. Redevelopment of the site will require major infrastructure improvements.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Cottam Local Centre (13)	GU	<p>This site is also part of the Interim Planning Statement No. 1. The IPS indicates that the site is suitable for a mix of uses (approved by Section 7(1) of the New Towns Act 1981 including residential, education, leisure, retail and health care. The site is currently greenfield and adjoins residential uses to the north and west, and greenfield land to the south and east. The site achieves a good market attractiveness score due to very good local road frontage and limited number of identified environmental constraints.</p> <p>Under site suggestions, the site has been promoted for residential/ retail and leisure uses.</p>	<p>The site achieves an average to good sustainability and strategic planning score influenced by limited public transport links and greenfield status of the site. However, there are very good footpaths and cycle routes leading to the site. The development of the site is unlikely to benefit or impact on the environmental quality as the site is already attractive and can also be attractive if developed.</p>	<p>Owner aspirations to provide leisure; retail (supermarket) and neighbourhood facilities. Development of the site should be guided by a Green Travel Plan and a Sustainability Plan to improve its sustainability score. It is estimated to be able to provide approximately 1,440 sqm of B1 office development.</p>
	Christian Road (21)	OS	<p>The site is occupied by the Royal Mail sorting office. It has very limited local road frontage however it is discreet within the street scene and unobtrusive. Owner aspirations are unknown and the site is not being marketed for any alternative use. Access to the site is moderate and there is sufficient on site parking and circulation. There are no major environmental policy constraints on this site.</p>	<p>The site achieves a good to very good sustainability score due to its City Centre location and previously developed land status. There are some limited infill and intensification opportunities on site however these are likely to be owner specific.</p>	<p>Royal Mail sorting office with potential for owner specific infill/intensification.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Hartington Road/ Fishergate Hill (22)	GU	A medium size employment site occupied by United Utilities and a Nissan garage to the rear. United Utilities occupy a group of circa 1970s office buildings along Harting Road. The building complex is well maintained and provides a positive business image. Access to the site is very good and there is moderate on site parking and servicing. The rear part of the site has a local road frontage and provides moderate access. There are no major environmental constraints identified on this site. For these reasons, the site achieves a good market attractiveness score however owner aspirations are unknown.	The site is located within the edge of Preston City centre. It has good links to public transport interchange. For these reasons, the site achieves a good sustainability score. However, the site provides very limited opportunities for infill/intensification therefore is unable to significantly add to economic activity within the ward unless comprehensively redeveloped which is currently unlikely.	Site occupied by United Utilities and Nissan Garage. Limited (owner specific) infill opportunities are possible however owner aspirations are unknown.
	Midland House, Maritime Way (23)	OU	A small site, located near to the Riversway complex, the site is currently occupied by a small car park and an office building. The site achieves a moderate score influenced by limited local road frontage, unknown owner aspirations and some major environmental constraints including high risk of flooding (Category 3).	The site also achieves a moderate sustainability and strategic planning score due to limited access to public transport and limited opportunities for development e.g. small offices subject to addressing the environmental constraints.	Small site adjacent to the large Preston Riversway Employment Site. Potential to deliver some small scale office development however site is within a high risk flood area.
	Paley Road (24)	OU	A small employment site occupied by a Honda garage and single and two storey warehouse buildings to the rear. The site appears to be fully occupied despite its limited local road frontage and poor building portfolio. Access within the site is poor and owner aspirations are unknown. For these reasons, the site achieves only a moderate score.	The site is previously developed land in close proximity to good bus services and good quality footpaths. Redevelopment of the site has the potential to significantly improve environmental quality however the site is already fully occupied and provides sound accommodation for smaller businesses. The site achieves only a good sustainability and strategic planning score.	An established employment site with a car garage within the western part of the site. Owner aspirations are unknown.
	Riversway Sites 5/6 (26)	OU	-	-	Recently redeveloped for residential development. It is unlikely to come forward for employment uses in the long term.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Bow Lane (27)	GU	A mixed use site containing circa 1970s office buildings, an attractive period brick office building and some residential development recently completed. The site has multiple local road frontage and no major environmental constraints. However owner aspirations are to develop the remainder of the site for residential development which significantly affects its market attractiveness score.	The site is within Preston City Centre, close to a public transport interchange and services. The site is also previously developed land which brings its sustainability score to very good. Development of the car park to provide a modern employment building could enhance environmental quality and also help to increase economic activity within the ward. However, owner aspirations (made under Site suggestions) implies that the owners have aspirations to develop the site for residential.	Employment site containing modern and period office buildings. There is an opportunity for intensification (owner specific or independent) over the open air car park. Part of site recently developed for residential. Owner aspirations to develop for residential.
	Riversway A – Portway/ West Strand (28)	GU	A large, modern employment site, Riversway A achieves a good market attractiveness score. It has very good, multiple road frontages, modern building stock and good access and internal road layout. However, the site has a high risk of flooding and owner aspirations are unknown apart from the rail engine building where a planning application is pending for a residential conversion.	The site achieves a moderate to good sustainability and strategic planning score, influenced by the site's previously developed land status and access to good public transport links. The site also represents opportunities for some infill development which could improve its economic activity.	Established high quality employment site with opportunities for infill development. Attractive rail engine building pending decision for residential led development with some office uses proposed. Owner aspirations for the remainder of the site are unknown.
Preston Eastern Suburbs	Rough Hey Industrial Estate (2)	GU	An established employment site containing a good quality building portfolio. A large part of the site is occupied by Booths and Inter Brew. The site achieves a good market attractiveness score due to a number of factors including close proximity to the M6 motorway, very good local road frontage, good local road access and no major environmental policy constraints. However owner aspirations are unknown.	The site is within an urban area but outside of a city centre location. Whilst there are good footpaths and cycle links leading to the site, there is limited public transport servicing the site which affects its sustainability score. The site provides opportunities for some infill development which could help to increase economic activity and enhance environmental quality.	Established employment site capable of providing some infill employment development.
	Site at Junction 31a (M6) East Loop) (9)	OU	-	-	Site recently developed (contains a Travel Lodge and Brewers Fair Pub). No further capacity for development.

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	Fulwood Barracks (10)	OU	Fulwood Barracks remains operational and contains a cluster of attractive period barracks and some modern terraced housing. The site achieves a moderate market attractiveness score due to its residential location, local road frontage, listed building implications and unknown owner aspirations.	Similarly, the site achieves an average sustainability and strategic planning score due to its limited links to public transport despite its previously developed land status. However comprehensive redevelopment of the site for employment uses could help to increase economic activity within the ward and contribute toward economic development. This however is unlikely to occur in the medium to long term and the current occupiers may need assistance to relocate.	Long terms aspirations of the owners is unknown. Site contains some constraints including listed buildings. Site considered unlikely to come forward in the short term.
	Mondi Board, Longridge Road (19)	OS	A large industrial site occupied by Mondiboard (packaging facility), the site is located within the employment land cluster adjacent to Red Scar. It has a very good local road frontage, good vehicular access and an attractive, purpose built modern building portfolio. Environmental constraints and owner aspirations for the site are unknown.	The site achieves a good sustainability and strategic planning score influenced by very good footpath and cycle links to the site, its brownfield status and ability through some infill development to attract further economic activity within the ward. However, any intensification/infill is likely to be owner specific.	Limited owner specific intensification can be accommodated.
Preston Rural	Depot, Whittingham Lane, Broughton (16)	OU	A two hectare employment site containing a group of warehouses which appear to be vacant. The site achieves a moderate market attractiveness score due to the site's 'backland' location without any significant local road frontage. It is committed for residential led development which will result in the loss of this site to non employment uses.	The site is previously developed land but achieves an average sustainability and strategic planning score influenced by its limited access to public transport and out of centre location.	The site is committed for residential led development which will result in the loss of employment space.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
Leyland and Farington	Dunkirk Lane, Leyland (SS1)	OU	The site achieves an average market attractiveness score. Whilst the site has good local road frontage, it is distanced from major arterial routes and is constrained by the existing listed building on site. The market attractiveness score is also affected by the owner's aspirations to redevelop the site for residential, also reinforced in the Site suggestions for the site.	The site achieves a moderate strategic planning and sustainability score due to its previously developed land status and the potential to improve economic activity in the area. However the site is outside of an urban centre location and public transport facilities to the site are limited.	The site is fully occupied by Expac with no current identified potential for infill/ intensification.
	Leyprint, Seven Stars (SS2)	OU	Leyprint is an established employment site which achieves a limited market attractiveness score. The quality of the building portfolio is poor and there is evidence of contamination on site. Its score is further affected by its distance from major arterial routes and poor quality of local road access.	The site's average sustainability and planning score is affected by poor public transport provision to the site and out of centre location. There are however positive features of the site including nearby cycle routes and good footpaths which improve the site's sustainability score. Redevelopment of the site (in the longer term if occupiers were to relocate) would create an opportunity to enhance environmental quality.	Discordant site occupied by Leyprint and smaller businesses. In full occupancy with current owner aspirations to continue to use as Leyprint.
	Preston Road, Farington (SS4)	OU	The site achieves an average market attractiveness score which is in part affected by owner's aspirations to redevelop the site for residential uses, reinforced through Site suggestions.	The site achieves a good strategic planning and sustainability score due to its previously developed land status as well as good access to public transport and footpaths leading to the site. However, the site is in an out of centre location and is unable to significantly further contribute to economic activity or address multiple deprivation within the area.	Site contains period warehouse buildings. Occupied by Comack (upholstery). Site has limited environmental constraints and is in a location likely to be suitable for a variety of uses. Site suggestions put forward part of the site for residential development.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Bow Lane 1, Leyland (SS5)	OS	The site is within 500 metres of the M6 motorway and is accessed by good quality local roads. It contains a circa 1960s office building which is well maintained. There is no marketing on site and owner aspirations are unknown. Any development on this site is likely to be owner specific.	The site is within an out of centre location however has very good access to nearby railway station and bus services. It is previously developed land and good quality extensions to the existing building could enhance the environmental quality.	Two storey office building occupied by TES Telecommunication. Whilst owner aspirations are unknown, rear part of the site has some capacity for 'owner specific' infill/intensification.
	Bow Lane 2, Leyland (SS6)	OS	The site is occupied by Nalestar in old stock warehouse buildings. Access to the site is poor via local narrow roads. The site has a small local road frontage which affects its market attractiveness score. Its score is further affected by adjoining sensitive land uses and small, irregular shape of the site.	The site achieves a moderate to good sustainability and strategic planning score. It is in close proximity to a railway station and bus links however it is in an out of centre location and is unable to significantly further contribute toward economic activity in the ward.	Site/warehouse occupied by Nalestar. There is likely to be some current capacity for (owner specific) intensification or redevelopment.
	Goldenhill Leyland (SS7)	OU [GU]	The site achieves an average market attractiveness score despite the site's proximity to the M6 motorway and the A49 route. Local road access is poor, roughly surfaced and is congested. Whilst some of the site has local road frontage, much of the site is screened by the A1 uses along Golden Hill Lane.	The site achieves a good sustainability and strategic planning score due to the site's proximity to good public transport links and siting adjacent to Leyland Town Centre.	The site is in multiple occupancy, accommodating lower end users and start up businesses. Owners have aspirations to develop the site for residential. Leyland Masterplan has been endorsed in March 2007 which aims to revitalise this area within a 10 year period (until 2016). If implemented, the site's 'other urban' classification could be raised to 'Good Urban'.
	Longmeanygate, Leyland (SS8)	OU	The site achieves a moderate market attractiveness score due to its poor access to major arterial routes. In addition, the site's score is further affected by the site's size, medium risk of flooding and contamination.	The site is previously developed land with good access to bus services and footpaths. The new office building makes a positive contribution to the site's appearance along the street scene however the garage poorly addresses the street and its redevelopment would enhance this position and could help to increase the site's contribution to economic activity in the area.	Small site in single occupancy with recent extensions. Achieves a moderate score against market attractiveness with some environmental constraints.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Quin Street, Leyland (SS10)	OU [GU]	The site's market attractiveness score is affected by poor quality local road access and very limited parking. The quality of the existing building portfolio is extremely poor. In addition, the site has limited local road frontage and the site is fairly small and is subject to some environmental constraints including contamination and in parts Category 2 (medium risk) flooding.	The site achieves a good sustainability score due to its proximity to the railway station and previously developed land status. The site could also provide an opportunity to enhance the quality of the immediate environment through comprehensive redevelopment and to also improve economic activity and to address multiple deprivation.	The site is occupied by NFM Foods and HE. Discussions with owners to promote the site for redevelopment as a commercial and office quarter through a masterplan are ongoing and if successful could improve its classification to 'Good Urban'.
	Earnshaw Bridge Mill (SS31)	OU	This mixed use site achieves an average market attractiveness score. Whilst it appears to be fully occupied, the site contains a mix of both old, period and modern prefabricated buildings which give the site a discordant appearance. In addition, the quality of local roads is poor with narrow and somewhat congested roads leading to the site. The site is also affected by environmental constraints including medium risk of flooding and contamination which affects its score.	The site achieves a moderate to good sustainability and strategic planning score due to its proximity to public transport and potential through redevelopment to significantly improve environmental quality.	Discordant site in multiple occupancy for a range of uses including light industrial, retail, sui generis and B1 Offices. Owner aspirations unknown however site has several environmental constraints including flood risk and contamination and adjoins a wildlife corridor.
Lostock Hall, Bamber Bridge & Penwortham	Kepak (Dunbia), adj. Walton Summit (SS11)	GU	The site achieves a good market attractiveness score due to the good quality of employment buildings and its proximity to the M65, M6 and A6 routes adjoining the site. Local road access is good and the site is surrounded by other similar employment uses. The site has very good major road frontage and whilst it has contamination and TPOs on site, there are no other major environmental constraints on site.	The site achieves a good sustainability and strategic planning score. It is within 1 kilometre of a railway station and if redeveloped would contribute to economic development consistent with local policies.	Relatively modern meat processing plant and abattoir, now owned and operated by Dunbia. There are some environmental constraints relating to contamination and TPOs. Owner aspirations are to redevelop the site for commercial, retail and distribution, reinforced through Site suggestions.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Walton-Le-Dale Corn Mill, Chorley Road (SS17)	OS	This site adjoins the A675 and the B5258. The local road is busy but appears generally uncongested however access to the site is limited. The site is exposed to a number of environmental constraints including contamination and high risk of flooding. The quality of the building portfolio is also poor.	The site achieves a moderate sustainability and strategic planning score. There are continuous footpaths and frequent bus services along the A675 which operate to Preston. Improving the internal circulation of the site and rationalising the siting of buildings could significantly improve environmental quality however this is unlikely to significantly contribute to economic activity within the ward.	Old mill site occupied by Massey Feeds. Unknown owner aspirations. Site has some constraints including flood risk and it is adjacent to a nature corridor. Any development is likely to be infill/ intensification and 'Owner Specific' unless redeveloped.
	Vernon Carus, Factory Lane (SS18)	O	This site achieves a poor market attractiveness score. It is in an out of centre, semi rural location with no local road frontage. Previously a purpose built cotton mill, the premises have been vacant for the last 2 to 5 years and the operators have moved to Matrix Park. Local road access and site circulation is extremely poor and the building portfolio is substandard. Owner aspirations are to redevelop for residential.	The site achieves a moderate sustainability and strategic planning score influenced by its previously developed land status, and potential to improve environmental quality through redevelopment.	Redevelopment likely to be residential led.
	Tardy Gate Mill (SS20)	OU	An old mill building in multiple occupancy achieves a moderate market attractiveness score due to its poor quality, discordant appearance and local road access. Whilst the site has very good local road frontage along Coot Lane, it has some contamination which affect its overall score.	The site achieves an average sustainability and strategic planning score influenced by good access to public transport, footpaths and scope to improve environmental quality through redevelopment.	Site fully occupied in a combination of commercial and employment uses. Owners, Tod have no aspirations to redevelop at this stage however; the site has no further capacity for intensification/infill unless redeveloped. Redevelopment of the site is likely to displace existing occupiers.
	Dardsley, Browndedge Road LH (SS21)	OS	The site has poor local road access via Browndedge Road which is narrow and congested. Whilst owner aspirations are unknown, the site has only very limited potential for owner specific intensification or infill.	Several bus services operate along Browndedge Road and there is a good footpath leading to the site. However, there is limited potential to enhance environmental quality through redevelopment as the existing building is fairly attractive and well maintained which affects its moderate sustainability and strategic planning score.	Site occupied by NHS and PPA with very limited potential for owner specific intensification.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Hecla Works, Brown Street, Bamber Bridge (SS22)	OU	An established employment site in multiple occupancy and adjacent to a railway line, Hecla Works achieves an average market attractiveness score. Quality of local roads is mixed with Station Road providing good local road access however the local road leading to the site is narrow and obstructed by cars parked along the street. The existing building portfolio is very poor and the buildings are poorly maintained. The site is also contaminated.	The site achieves a slightly better score for sustainability and strategic planning due to its previously developed land status, close proximity to Bamber Bridge Railway Station and potential through redevelopment to enhance environmental quality. However, the site does not have significant capacity to contribute further to economic activity within the ward or to address multiple deprivation.	Established employment site in current multiple occupation and with limited opportunities for infill/intensification. Redevelopment of the site likely to require local infrastructure upgrade (highway/ access). Owner aspirations are unknown.
	Pear Street, Bamber Bridge (SS23)	OU	The site is small with local road access to the site being congested and narrow. The site also has very limited local road frontage as it is within a cull de sac, surrounded by sensitive land uses such as residential. Part of the site has been redeveloped for residential with further pressure to develop remainder of the site (currently used by Modern motors) for non employment uses. The employment part of the site is likely to be contaminated which combined with the above assessment contributes to a poor to average market attractiveness score.	The existing motor workshop is discreet within the street scene. Whilst the site is previously developed land, it does not provide opportunities for any infill or intensification. The site achieves a moderate score.	Approximately half of site (0.15 hectares) has already been lost to residential development. Remainder of employment site unable to provide infill/intensification. Likely to be pressure for residential redevelopment (long term).
	Liverpool New Road, Much Hoole (SS24)	OU	A medium size employment site in Much Hoole. It is in multiple occupancy and achieves only an average market attractiveness score due to poor access to parts of the site, old stock warehouse portfolio, adjoining residential uses and poor internal site access and circulation. However the site does not have any major environmental policy constraints and it has very good road frontage visibility onto Liverpool Road.	The site also achieves an average sustainability and strategic planning score which is influenced by limited nearby bus services, limited footpaths and edge of village location.	Established employment site in multiple occupancy. Small pockets of vacant land likely to be available for infill/intensification.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Fourfields House, Station Road, Bamber Bridge (SS25)	OS	The site contains modern two storey office building within an attractive garden setting. Access to the site is via an uncongested local road to which the site has a good frontage. The building and gardens are attractive and well maintained despite its aged appearance. Whilst the site adjoins sensitive land uses such as residential and leisure, offices are generally compatible in this location. The site is contaminated but there are no other significant environmental constraints.	The site achieves a moderate to good score in terms of sustainability and strategic planning mainly due to its previously developed land status, good access to local bus services and footpaths and potential to contribute toward economic development. However the site is only able to provide limited owner specific infill/intensification.	Site has capacity for limited 'Owner Specific' infill/intensification.
	Edward Street/ Winery Lane (SS26)	GU	This is an established employment site (formerly a vehicle assembling factory), now in multiple occupancy for bulky retail and warehousing. The site achieves a good market attractiveness score influenced by its location adjacent to the A6, good quality local road access, well maintained, high occupancy and compatible adjoining land uses. However, the site has limited road frontage and there a number of environmental constraints including contamination, medium risk of flooding and designation on part of the site as a bus priority route.	The site achieves a moderate to good sustainability and strategic planning score influenced by its previously developed land status, potential to improve the quality of the buildings on site, and continuous footpaths leading to the site. However, there are only limited bus services operating within 500metres of the site and it is within an out of centre location.	Site has poor road frontage and certain environmental constraints creating an overall average business image. Owner aspirations are unknown. Policy FR.2 of the adopted Local Plan (2000) allows the site to be developed for non food retail, offices, a hotel, tourism or leisure facilities,
	Aspden Street, Bamber Bridge (SS27)	OU	The site has recently been redeveloped with warehousing units. It is a small site located approximately 1 kilometre from the A6, M6 and M61. The site achieves an average market attractiveness score due to poor local road frontage, small size and contamination. At the time of the site visit, the new warehousing units were not occupied or being marketed.	The site also achieves an average sustainability and strategic planning score due to it's out of centre location and limited bus services within 500metres from the site. However, Bamber Bridge Railway Station is located just over 500 metres from the site.	Site recently redeveloped with two employment units (warehouses), replacing 1,050 sqm. of B8 floorspace. The new units are likely to attract small established business seeking to relocate to better quality premises.

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Hopwood Street, Bamber Bridge (SS28)	OU	The site is accessed via Hopwood Street which is a cul de sac. Part of the site has been redeveloped for residential development with the remainder containing older profiles steel storage/ warehousing sheds. The site achieves an average market attractiveness score due to its small size, limited local road frontage, congested local roads leading to the site and poor quality of existing employment building portfolio. The site is also contaminated.	The site achieves a moderate sustainability and strategic planning score, influenced by its proximity to bus services and Bamber Bridge railway station (within 500 metres of the site), previously developed land status and potential to enhance environmental quality by improving the appearance of the employment buildings. The site is located within an area of moderate economic activity where (longer term) redevelopment of the site could contribute toward increased economic activity in the area.	Part of site redeveloped for residential which has resulted in the loss of 459 sqm. of B8 uses. Whilst owner aspirations are unknown, there are likely to be pressures for redeveloped to non employment uses (residential) on the remainder of the site.
	Heatherfield Works, Church Road (SS30)	OS	The site is entirely occupied by Whitfire in a collection of warehouse buildings. The site is accessed via a narrow local, uncongested road. The existing buildings are of prefabricated steel construction and whilst the site appears to be well maintained, there is no soft landscaping on site and local road frontage is very limited. The site is also likely to be contaminated.	Overall, the site performs very poorly against sustainability and strategic planning indicators. There is no nearby public transport or continuous footpaths and cycle routes. The site is within an urban area however only 50% of the land is brownfield. The remainder of the site is safeguarded under the Local Plan.	Front part of site occupied by Whitfire with rear part remaining as greenfield with limited access. Development of rear part of site likely to come forward for 'owner specific' development/ intensification which will require provision of road infrastructure. As this land is safeguarded under the adopted Local plan, it is only likely to come forward in the medium to long term.
Eastern Parishes	Samlesbury Mill, Goosefoot Lane (SS12)	O	The site is an old mill within a small village location. The site achieves a poor market attractiveness score due to its rural location, poor access, distance to major arterial roads and significant environmental constraints including high flood risk and contamination.	There is a bus service that operates through the village however there are no footpaths or cycle routes leading to the site to contribute to its sustainability score. Whilst the site is previously developed land containing period mill buildings, the buildings would be costly to repair to a level where they would significantly enhance environmental quality. Overall, the site has very low prospects of significantly contributing to economic development.	Site has major environmental constraints (within Green Belt and in an unsustainable location). Existing buildings are not used to full capacity however provide low cost start up accommodation. Redevelopment likely to be most attractive to non employment uses.

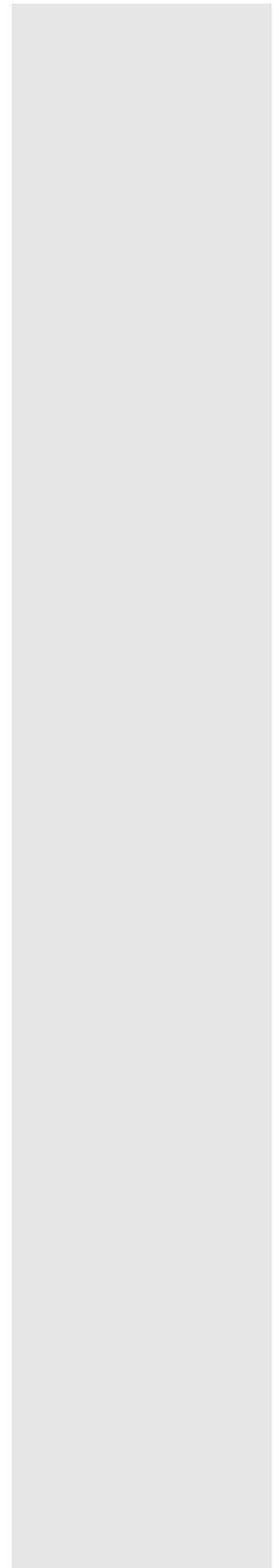
Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Roach Bridge Mill, Samlesbury (SS13)	O	<p>This empty mill is within the village of Samlesbury. It is boarded up and has been empty for the last five years.</p> <p>The site achieves a slightly better market attractiveness score than Samlesbury Mill due to the site's closer proximity to a major arterial road, larger size and good local road frontage. However the site is also subject to a number of environmental constraints including Green Belt location, contamination, high risk of flooding in part and adjoining a wildlife corridor.</p>	<p>The site achieves a poor sustainability and strategic planning score. It is in a rural location with no nearby bus services operating in the area. Whilst the site is previously developed land, there are no footpaths or cycle routes leading to the site. The site has no real prospects in significantly contributing toward economic development.</p>	<p>Vacant period mill buildings. Redevelopment likely to be most attractive to residential-led proposals.</p>
	Higher Walton Mill (SS14)	MU	<p>This attractive period mill building is in multiple occupancy and in employment use. It achieves an average market attractiveness score influenced by its proximity to major arterial routes, good local road frontage, size and topography. However, the site is contaminated and has high risk of flooding. The internal access road is very poor.</p>	<p>Similarly, the site achieves a moderate sustainability and market attractiveness score. Whilst the site is previously developed land in active use, it is in an out of centre location but with some bus services operating close to the site.</p>	<p>Large, established and attractive mill building in multiple occupancy. Potential for further intensification (refurbishment). The site has been put forward for residential development under Site suggestions. Potential for mixed-use development.</p>
	Coupe Foundry Higher Walton (SS15)	OU	<p>This established foundry is located in Higher Walton. The site contains period stone workshops.</p> <p>The site achieves a limited market attractiveness score due to its average building portfolio, poor maintenance and access, limited local road frontage and a number of environmental constraints including contamination and high risk of flooding (Category 3)</p>	<p>The site achieves an average to good sustainability and strategic planning score due to its previously developed land status, continuous footpaths leading to the site and potential to enhance environmental quality through redevelopment. However, the site benefits only from limited bus services that operate through the area and is in an out of centre location,</p>	<p>The site is occupied by Coupe Foundry. Redevelopment of the site would displace current occupiers (owners have aspirations to redevelop the site for residential led development).</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Bannister Hall Works (SS16)	0	<p>This is an established employment site occupied by a mix of modern and older warehouse buildings. The site is in multiple occupancy including Oscar Pet Care Services and ATEC Storage. It also houses a former bleach and dye works.</p> <p>The site achieves a poor market attractiveness score due to its end of lane location which is narrow and in an extremely poor condition. The buildings on site are well maintained but have no significant architectural merit. The site has no local road frontage and is subject to a large number of environmental constraints including contamination, high risk of flooding (Category 3) and is also within the Green Belt.</p>	<p>The site achieves a fairly poor sustainability and strategic planning score. Whilst the site is previously developed land, it is in a rural location, distanced significantly to sustainable means of travel including cycling or use of public transport. Redevelopment of the site would neither harm nor enhance environmental quality as the site is isolated. Overall, the site does not have the ability to deliver any additional economic development.</p>	<p>The site has very limited capacity for infill/intensification development being heavily constrained by its Green Belt designation and poor quality access.</p>
Western Parishes	Bamfords Mill, Midge Hall (SS3)	0	<p>This mil site is occupied by Globe Mill Leyland.</p> <p>The site achieves a poor to average market attractiveness score due to its remote location, distance from any major arterial routes and access via narrow local roads. The site contains a mix of building styles which are discordant and affect the overall quality of the building portfolio. Whilst the site has a good local road frontage and is medium size, it is within the Green Belt. The site is also likely to be contaminated.</p>	<p>The site is previously developed land but is outside of a defined urban area and has no nearby public transport or footpath facilities. The site therefore achieves a moderate sustainability and strategic planning score.</p>	<p>Significant environmental constraints (within Green Belt) and unknown owner aspirations.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	AMS Trading Estate, Brownhill Road (SS19)	O	<p>This is an established employment site, in multiple occupancy which contains a cluster of older prefabricated warehouse buildings.</p> <p>The site adjoins the A59 and whilst access to the site is good, the internal circulation and parking/servicing is poor. The building portfolio is aged and whilst the site has local road frontage, most of the site is screened by mature Leylandii trees. The site is heavily constrained in terms of environmental policy as it is located within the Green Belt.</p>	<p>The site achieves a moderate sustainability and strategic score influenced by its previously developed land status but with limited access to bus services and continuous footpaths. The site is also outside a defined urban area and redevelopment of the site is unlikely to deliver significant economic development.</p>	<p>Site has significant environmental constraints (within Green Belt). Owner aspirations unknown however site likely to only accommodate limited owner specific development.</p>
	Peel View, Drumacre Lane (SS29)	OS	<p>Similar in character to the AMS Trading Estate, this site contains two older warehouse buildings in a rural location. The buildings are currently occupied by NWES Trailer Rental and Maintenance Depot (haulage).</p> <p>The site achieves a poor market attractiveness score due a number of factors including narrow local road which leads to the site, poor building portfolio, sensitive neighbouring land uses, poor local road frontage, and Green Belt location. In addition, owner aspirations are unknown.</p>	<p>Similarly the site achieves a low sustainability and strategic planning score given that there are no nearby public transport facilities, no footpaths or cycle routes and rural location. The site has very limited scope to enhance the environmental quality or contribute toward economic development.</p>	<p>The site within Green Belt where there is a presumption against development. Owner aspirations are unknown however the site likely to accommodate extremely limited owner specific infill development.</p>

Sub Area	Site (ELS Ref or Local Plan Policy Ref)	Classification	Market Attractiveness	Environmental Sustainability & Strategic Planning	General Comments
	Walmer Bridge (SS32)	OU	<p>This is an established employment site in multiple occupancy located within Walmer Bridge.</p> <p>The site achieves an average market attractiveness score influenced by the site's proximity to the A59, relatively wide local road access, fairly compatible adjoining land uses, good local road frontage and no major environmental policy constraints. However the site does contain a mix of building styles of mixed quality which negatively affect its overall business image.</p>	<p>The site also achieves a moderate sustainability and strategic planning score. Whilst the site is previously developed land, it is in an out of centre location and has some footpaths leading to the site. Development or redevelopment of the site would not significantly enhance or detract from the wider environmental quality.</p>	<p>Established moderate quality employment site with no obvious capacity for infill / intensification.</p>

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6. Overview of Market Demand

Introduction

- 6.1 Previous chapters deal with the quantitative and qualitative supply of employment land and premises. This section provides an overview in market terms of the various sub-areas of the study – see Plan 9.1 in Chapter 9. Taken together with the forecasts and business survey in the following sections, this will provide an indication of the scale and nature of demand for employment land.
- 6.2 The market overview included in this section is based on the following:
- n Interrogation of local commercial agents and Council databases of available properties to obtain details and general overviews of market availability;
 - n Review of existing reports and strategies to provide a picture of local and more general external factors which will impact upon the existing and future market;
 - n Reviews of past trends, vacancies and completion rates; and
 - n Interrogation of databases EGi, FOCUS etc.
- 6.3 Market practice is to operate the imperial system, with agents and surveyors quoting, letting and selling space on a price per sq ft basis. The only property sector that operates using metric as its primary measurement is Rating, driven by the Valuation Office Agency use of sq m.
- 6.4 Normal reporting convention in the market is therefore to provide all figures as metric to comply with RICS rules but then with imperial figures following in brackets.
- 6.5 In other sections of this report we have adopted the metric system only and so for ease and conformity, we have used metric figures in this section too.
- 6.6 As a general note, we would normally expect to separate offices, manufacturing and storage and distribution property into different classes as there are differences in demand and requirements for these uses.
- 6.7 In some of the sub-areas within this study, there are very few employment sites at all, and the make-up of those sites in those sub-areas do not necessarily constitute a true 'market'. The majority may be in one use type with none in another, or there may be no bias with so few properties showing completely disparate characteristics in terms of size, age, type etc that no meaningful conclusions can be drawn.
- 6.8 Ordinarily we would separate out the sectors and provide commentary on each market for supply and demand terms, but here we have had to condense our comments and restrict them to treat industrial property as a single sector and therefore have combined manufacturing with distribution and warehousing. This also accords with the data sets and records that have been kept to date (there is little analysis between the different use classes). If we attempted to split the data to comment separately on different use classes it would make analysis unreliable, could produce misleading data and incorrectly state trends.
- 6.9 If there are clear differences between the use classes in any of the sub-areas, we have commented separately on this.

Chorley Central

General Market Overview

- 6.10 Chorley Central, as the name suggests, includes the main urban area of Chorley itself together with Euxton to the north and Coppull to the south. The area also includes Adlington, Whittle le Woods and Clayton. It is sandwiched between the M6 and M61 motorways with J8 of the M61 being the closest junction.
- 6.11 In terms of new completions, there is little data available to analyse other than what we have provided comment on in Chapter 4. As can be seen from Chart 4.1 completion figures in Chorley (as a whole) increased dramatically in 2006/ 2007, from a previously very low figure of fewer than five hectares per annum. The huge rise in the rate of completions is largely attributable to development at the Regional Investment Site at Buckshaw.

Industrial Property

- 6.12 In terms of vacant premises, 70,533 sq m is available, in comparison to built stock of 369,000 sq m (19%). This is a high vacancy rate, but is affected heavily by the largest units built speculatively at The Revolution at Buckshaw Village. Three units alone comprise almost 50,000 sq m of the vacancies, hence letting of these units would considerably change the void rates relating to the entire sub-area. The units are purpose-built logistics and distribution properties, with high specification and motorway access. Despite this, attracting tenants has not yet proved straightforward, with larger premises further south (in relation to the national picture) being favoured.
- 6.13 Property ranges from the very small, for example with individual units at Coppull of less than 100 sq m, right up to the larger units mentioned above, thereby affording opportunities across a multitude of sectors.
- 6.14 Chorley Central includes a number of large sites where further industrial employment is allocated. Buckshaw Village again is one of the primary areas, being a purposefully planned new employment area for growth in Chorley. Other large sites include Cowling Farm, Red Bank and the Botany sites at Great Knowley. Warehousing and distribution is clearly the emerging factor, with evidence from for example Matrix Park (whilst outside this sub-area) showing that take-up of the industrial is outperforming that of offices.
- 6.15 Committed sites could contribute 79,905 sq m of industrial space, with 161,790 sq m of further allocations, totalling just over 240,000 sq m. This will add around 67% of built stock, but with former large hereditaments being split to offer better flexibility.

Offices

- 6.16 With regard to overall supply, the Chorley Central sub area has a good sized market with 71,000 sq m of space in 369 properties. This equates to an average size of 192 sq m, or around 2,000 sq ft, which is quite modest but to be expected in a town as opposed to a city.
- 6.17 The largest vacant office found available at the time of reviewing was 640 sq m, which is relatively small. This is on a lease assignment in Pall Mall Triangle. Similar sized space can be found at Moorland Gate Business Park or Ackhurst Park, where buildings can be let by floor to allow flexibility. Much of the space in the Central sub-area is available by suite or individual

- offices, which mirrors both the physical attributes of properties (for example cellular or multi-floor buildings) but also reflects how landlords/ owners believe a property will most readily let as they try to market a property in the most advantageous way.
- 6.18 Very little of the space is speculative new-build, demonstrating an active churn of local tenants but no large requirements for example of in excess of 1,000 sq m that could be accommodated in new premises.
 - 6.19 Smaller office units mean that companies with larger numbers of employees (>50) would not be able to find suitable single space in the town, however larger firms would be more likely to look to a city or business park in any event.
 - 6.20 Certain properties are aimed at sectors of the market, for example the Chorley Business & Technology Centre has successfully attracted business and IT consultants, which fit with its marketing profile. Flexible space and lease terms are advantageous to modern occupiers as the business world is more transient with needs for faster reaction to growth and contraction in terms of property occupancy.
 - 6.21 In overall vacancy terms, 4,296 sq m of space was found vacant, representing 6% of stock. This is reasonable given the local market that operates.
 - 6.22 For future stock, there is an abundance of both allocated sites without permission and sites with permission that could add to the overall floor area. Commitments total 7,643 sq m and allocations total 68,680 sq m, which would more than double existing stock, but this demonstrates that of the total pipeline only circa 10% is subject to permission. Market take-up will be slow and steady, with for example a need for Buckshaw Village to be brought forward in a comprehensive manner rather than implementing all commercial space in advance of all residential or other mixed-uses. Growth will be organic rather than comprising complete new migrations into the sub-area.
 - 6.23 Take-up has not been recorded specifically against sub-areas and types of property, but the figures show an erratic rather than consistent pattern. It suggests that as new development is constructed, vacancies rise but with lettings lagging behind the vacancies fall. Speculative development is difficult to encourage, for example at the Botany site extant permissions have not been implemented.

Chorley East

General Market Overview

- 6.24 The Chorley East sub area mainly comprises a large expanse of unspoilt and undeveloped land east of the M61 and Chorley town. The north and south west corners are separated from the remainder by the M65 and M61 motorways. Overall there is comparatively little built environment in this sub-area.

Industrial Property

- 6.25 In the Chorley East sub-area, existing built stock of industrial property amounts to 126,000 sq m in 179 hereditaments (ONS). This provides an average of 704 sq m per unit.
- 6.26 We were unable to find details of property to let or for sale in this sub-area. Whilst it is unlikely that occupation is really running at 100%, it is more

realistic to assume that the premises that are vacant are either so small or of insufficient quality for the owners to consider seeking tenants in the normal manner of advertising space in property circles.

- 6.27 In terms of potential new supply, there are no allocated sites in Chorley East nor are there are committed sites with planning permission. This demonstrates a real lack of either available land in this widespread but undeveloped area, and also a lack of windfall opportunities. The only potential gain is the Railway Road depot at Brinscall which may be capable of supporting 248 sq m of manufacturing space, but this is a nominal amount.
- 6.28 We also doubt that there have been any new completions worthy of mention in size terms in Chorley East over the last few years. The figures for Chorley as a whole were very low until 2006/ 2007 overall but data is not available for Chorley East specifically.

Offices

- 6.29 Chorley East has office stock totalling a nominal 8,000 sq m comprised in 37 hereditaments, equating to an average 216 sq m. We were not able to find any vacancies in this sector either and again suggest that occupation is taken up more by word of mouth and local knowledge than by using highly publicised marketing campaigns.
- 6.30 In terms of new supply, there are no allocated sites, sites with planning permission, or possible gains identified. This suggests market demand and supply are at an equilibrium which changes little year on year, and with the built areas sparsely distributed across this sub-area this is unlikely to change in the short to medium term.

Chorley West

General Market Overview

- 6.31 Chorley West is a reasonably large sub-area geographically, lying west of the M6 and of the town itself. The largest place within this sub-area is Eccleston, but this village is small with a population of around 5,000. On the whole the sub-area is dissected by local roads and a train line through Croston, and there is no real property market to speak of. Premises are confined to small estates or conversions in individual locations and there are few vacant properties or transactions to analyse. It is unlikely that demand is high in this area nor likely to improve unless the infrastructure is changed, so information is sporadic.

Industrial Property

- 6.32 There are only limited pockets of supply in Eccleston, Croston and Mawdesley, comprising the Carrington Centre, Twin Lakes Industrial Estate and Towngate Works.
- 6.33 All of these are primarily small units, typically less than 500 sq m, and of mixed quality. If larger space is wanted, units could be combined but this is not straightforward and the economics of doing so would probably not justify it taking place.
- 6.34 In the Chorley West sub-area, the existing built stock of industrial property amounts to 57,000 sq m in 132 hereditaments (ONS). This provides an average of 432 sq m per unit.

- 6.35 Currently available property to let or for sale ranges from units of 42 sq m up to 581 sq m with none exceeding 1,000 sq m in size. The largest referred to is the Twin Lakes Industrial Park, but the figure stated as available is the total floor area permitted to be built.
- 6.36 Aside from Twin Lakes, the average size of vacant stock is 190 sq m, considerably smaller than the overall average for the sub-area; however splitting the latter between manufacturing and warehouse/ distribution shows averages of 243 sq m and 672 sq m respectively. The vacant average size is far more akin to the manufacturing average than the warehouse average.
- 6.37 In terms of total vacant premises (but again excluding the total figure for Twin Lakes) we found details of 1,526 sq m of space, which would represent only 2.7% of total floorspace. This is a good (low) void rate given the nature of the estates. If more demand were shown, we believe that more units could be built at Twin Lakes. The overall quality of that property and its immediate environs would not necessarily attract demand however.
- 6.38 The vacancy and completion rates would appear to show very little interest in the market in this sub-area with very low development and no new properties coming on stream. The lack of new building despite a planning permission at Twin Lakes demonstrates the non-urgency of developers and landowners and suggests no confidence in speculative construction.
- 6.39 Looking at pipeline development, there is also very little coming through. The only identified sites mentioned are the Twin Lakes site and 0.6ha behind New Street at Mawdesley, and in terms of more immediate supply, there are no sites already with planning permission.
- 6.40 It might be said that the rate of construction of employment development has outstripped supply of land coming through the pipeline, however we are aware that the original Twin Lakes site has had the benefit of permission for some time and still not been fully developed. Its allocated extension seems adequate given the slow rate of any new proposals being received by the Council.
- 6.41 Demand in Chorley West comes from small firms and local companies looking for property of 500 sq m and below that is cheap to rent. Location and quality is less important than price and the existing premises are likely to have a steady but low turnover of local businesses and occupiers. It is also likely that occupational agreements are less formal and based on weekly payments on an all inclusive basis, rather than the traditional property lease on full repairing terms.
- 6.42 This demonstrates very little in-depth demand for true employment uses of B1/B2/B8. Properties are dealt with on a more local level with landowners and individual firms being involved, and records of enquiries are not robust enough to be categorised.

Offices

- 6.43 Chorley West has an even smaller office provision than industrial property. There is only a recorded 5,000 sq m of built stock arising from 35 hereditaments, meaning the average size for a unit is 143 sq m. The only vacant premises were at Towngate Works and the newly refurbished Grove House at Eccleston. This latter suits start-up businesses as it offers good quality premises on an 'easy in easy out' option, so overall costs can be quantified and if an occupier faces financial difficulty the liability can be severed pretty quickly. This affords a transient market with a likely high

changing vacancy offer, but which is unlikely to exceed a tolerable level for the owner/ landlord.

- 6.44 In terms of new supply, the potential total on identified sites without permission is around 2,400 sq m, which would increase existing stock by 50%. It would provide a completely different product but the cost of doing so compared to achievable rents would render this unlikely. The likelihood of this coming forward is to be considered low.

Preston City Centre

General Market Overview

- 6.45 Preston city centre is a relatively small area in terms of overall land and is naturally constrained by the River Ribble to the south and by the Inner suburbs to the north. Property within the city centre is densely developed and offers a mix of commercial offices, a limited amount of industrial, retail property including markets, and some residential in the south west Broadgate area close to the river. These uses bring ancillary car parking and the like, and there are also for example a number of civic uses such as the library, the Council offices, Courts, and sports facilities/ parks. The southern part of University of Central Lancashire's Preston campus is also just within the city centre.
- 6.46 Preston train station is fairly central. The main bus depot is on the north east side of the city centre (i.e. at the opposite end of the city centre to the train station). Park and ride schemes operate and there are a number of public car parks, hence accessibility is reasonably good.
- 6.47 In terms of the property market, industrial is very limited as is usual with city centre locations, which tend to be dominated by more valuable land uses than manufacturing or warehousing. The office market comprises mainly older stock with refurbished offices being let by suites and floors, as the tight fabric of a city centre allows low prospects for large tracts of new-build premises without comprehensive redevelopment, which often requires land in multiple ownership. Furthermore pressure on land values and build costs can mean that often new-build schemes in city centres are less economically viable than out-of-town schemes where land is more cheaply available and new-build can be kept low-rise to keep costs to a minimum.
- 6.48 In terms of take-up, Chart 4.1 included at Chapter 4 shows that in Preston over the last six years, completion has been at around 6.7 ha per annum on average. It is difficult to translate this into an office statistic for the city centre, as central stock tends to be more high rise so takes up less hectareage than on the outskirts of towns, and also there is no recorded split between offices and industrial property within these figures.

Industrial

- 6.49 There are 64,000 sq m of industrial space in the city centre, split roughly into one-third manufacturing and two thirds warehousing or distribution. This is around 22% of the overall employment space in this sub-area.
- 6.50 Four premises make up the void total, with Faisal House and properties on South Meadow Street and Campbell Street being roughly equal in size and a smaller property on School Street making up the remainder. This doesn't offer a great variety and for example no start-up units are included, so a letting of any one of these could change the vacancy total by a disproportionate amount. However in the city centre it would be unusual to

expect a great variety of premises and start-up businesses would be more likely to be attracted to a small trading estate than the city centre.

- 6.51 The only committed site in the city centre is at Walker Street/ Great Shaw Street for 313.9 sq m of space, a small unit size for warehousing. It would be unlikely that any other new sites were planned.

Offices

- 6.52 Overall office stock is far higher, in the region of 220,000 sq m, with an average size of 463 sq m. A number of larger office blocks have been divided up into small units and are being let on a floor by floor basis to attract smaller companies, for example Norwest Court, Victoria House, Lowthian House and Guildhall House.
- 6.53 In terms of availability, we found details of 17,959 sq m of space in the city centre, equating to around 8% of space. This is about what should be expected in a normal market with space for tenants to move around, to take more space, and with a variety of building types.
- 6.54 One of the most well-known addresses is Winckley Square, an attractive quadrangle with central park surrounded by a number of period buildings but with more modern in-fill buildings included. Buildings on the Square are being sub-divided for letting although there are occasional freehold opportunities that come to the market.
- 6.55 Vacant space is generally of a modest size. The property with the most space, and which could form the largest single letting, is Lowthian House, with just over 4,000 sq m on its nine floors. The floors can be let independently, and it is more likely that occupiers would be found on that basis.
- 6.56 The only other buildings with space in excess of 929 sq m (10,000 sq ft) are College House on Winckley Square, Norwest Court, and Ringway House on the Ringway. All have multi-floor space however, so floor plates are generally less than 465 sq m.
- 6.57 Going forward, there are no committed allocated sites in the city centre, but approximately 15,655 sq m of space is committed to be brought forward on sites outside allocations, predominantly as office space.
- 6.58 This is not a significant amount given overall total stock and vacancy level currently, and we also estimate that any new completions in the city centre would primarily replace older stock, so improving quality but the overall amount of space is unlikely to increase considerably. This is unsurprising given the tight area and the constraints of the existing built form. Given the amount of space on the outlying areas, this would not automatically preclude growth in the services or office sector in Preston as a whole.
- 6.59 We are aware that proposals are emerging for a potential Central Business District (CBD) over an area of approximately ten hectares. The proposals do not currently indicate additional new potential development, and indeed this would be subject to the same issues outlined above, but may allow the area to become a focus for higher quality occupiers and employers.

Preston Inner Area

General market overview

- 6.60 Preston Inner Area comprises the suburbs immediately north of the city centre, in an arc going from Frenchwood in the east round through Deepdale and Adelphi as far west as Waterloo Road/ Strand Road. The

area comprises a lot of residential dwellings, with a number of repeated patterns of parallel narrow streets. Interspersed with the housing are several large areas of employment, and smaller pockets of individual works and factories or small clusters of units.

Industrial

- 6.61 The main area of employment space is around the prison either side of Ribbleton Lane, with two other larger areas at Bute Mill and at Greenbank Street. Overall stock for the area comprises approximately 481,000 sq m, around 88% of the employment space in this area, demonstrating that the Inner suburbs are the converse of the city centre with regard to ratio of office to industrial space.
- 6.62 The average property size is 745 sq m which is moderate, and the vacant stock is smaller than this at 497 sq m on average. Removing the largest property brings the average down further, to around 320 sq m, demonstrating that there are few opportunities for large new premises to be had and that larger scale occupiers do not vacate premises often.
- 6.63 In terms of take-up, it is difficult to measure from the recorded completions but we would expect completions in this area to be low given the low availability of land.
- 6.64 There are no committed sites and the only site with potential capacity for more industrial space is at Jubilee Trading Estate, with room for circa 768 sq m of B2 space.
- 6.65 This shows a lack of ability for the sector to grow in the Inner suburbs, but given the poor accessibility for large vehicles and proximity to motorway access, it would be more likely that for example large distribution occupiers would sequentially prefer the eastern suburbs. The lack of new space is not therefore completely detrimental but it could mean that businesses seeking expansion space are mostly hampered by existing neighbours and may need to split operations where possible.
- 6.66 The property in the inner suburbs does reflect its older character with older mills and factories, and relatively cheap space.

Offices

- 6.67 There are few office premises in the Inner suburbs and a number are multi-let conversions on short-term leases with inclusive rentals being quoted. These tend to use older buildings that have outlived their original use and have been updated to provide incubator-type suites on flexible terms for smaller and start-up businesses. Examples are Benchmark and Watermark, and the Harris Knowledge Park, which was partially funded by the NWDA and includes some Listed buildings.
- 6.68 In terms of overall existing stock, the ONS figures show that there is a total 66,000 sq m in 183 hereditaments, equating to a small average size of 360 sq m.
- 6.69 With regard to availability, of the 8,917 sq m in our review, most of the premises offer small units or suites, of less than 465 sq m. Where larger property is available this is being sub-divided, for example at Fylde Business Park, to increase the chance of letting. This shows agents belief that flexibility needs to be allowed and that large office lettings in this location are unlikely.
- 6.70 Vacancies at this level however run to around 13.5% of total stock, which is quite high, and indicates the lack of strength of market in this suburban

location for offices. As office occupiers often prefer either a city centre or business park location for access, visibility or new offices, then a higher void rate in this 'mid-town' area in between is understandable.

- 6.71 In terms of future supply, the only committed site is an unallocated site at North Road A for 750 sq m of offices. However as the vacancy rate is already high, and the area is already densely developed, a lack of potential office pipeline supply is not of concern.

Preston Western Suburbs

General Market Overview

- 6.72 The Western sub-area of Preston is dominated by Ashton-on-Ribble and Cottam/ Tanterton, two residential areas divided by a mainline railway line. West of Ashton and Cottam is open countryside.
- 6.73 Ashton is just north of the River Ribble, and a large part of employment in the area is at the Riversway Docklands. The Docklands stretch along the waterside and offer a variety of older industrial and newer office premises, also mixed with recent housing development brought forward because of the attraction of waterside living.
- 6.74 There are numerous estates within the Docklands area, for example The Pavilions, Edward VII Quay and Riversway Business Village. Further west is Riversway Phase B, but the only other two sites for employment in the area are the Cottam Hall Brickworks site and Cottam Local Centre.

Industrial Property

- 6.75 Around 70% of the built employment space in the Western area is industrial. 124,000 sq m of space are included in 215 properties, giving an overall average of 577 sq m per unit, which is not particularly large. With the harbour and docks it could be expected that there would be a higher number of larger occupiers but the business villages and residential have increased in number and will have reduced the overall size of units.
- 6.76 With regard to vacant stock, there are no large units at all within our review. The largest was 892 sq m followed by 764 sq m, both at Oyston Mill. Leaving out those two units, the average size of all others found (most of which were also at Oyston Mill) was only 133 sq m, demonstrating a complete lack of property for large occupiers. Unless the occupier were water-related however, then a better location for newer and bigger premises would be on the eastern side of Preston where the motorway connections are better and it would not involve vehicles having to negotiate around Preston.
- 6.77 There is a small allocated site at Riversway B of 0.44 ha (which could support around 1,860 sq m) but no committed sites for industrial space in the Western Suburbs, reflecting a lack of interest from landowners in bringing forward new industrial development on this side of town. The recent introduction of residential will have squeezed land values higher and to introduce large scale manufacturing would now be more problematic both in terms of neighbours and values.
- 6.78 We note that Riversway Phase B has been the subject of car showroom development with its prominent road frontage and room for display purposes. Demand for further similar uses could be expected.

Offices

- 6.79 Office provision in the Western area is also limited, despite the more modern business villages which tend to offer smaller units in a good quality environment. Typical hereditament size of established stock is 406 sq m.
- 6.80 Vacant stock reflects this pattern of modest unit sizes with the exception of West Strand Business Park and The Pavilions, which both offer properties in the region of 1,500 sq m.
- 6.81 The void rate of 16% is affected by these latter units, which, if lettings were achieved on those units, would drop considerably. It would also be more reflective of the market with more smaller premises than large being available.
- 6.82 Going forward, the Riversway B site is the only allocation with planning permission for more offices, where 5,874 sq m could come forward. This is high in relation to the 7,682 sq m currently vacant and would increase overall capacity by circa 12%.
- 6.83 Furthermore, the unallocated Riversway Phase B site and the two sites at Cottam could potentially add a further 8,180 sq m of office space, which would increase existing capacity by 17%. With vacancy levels at current rates, it will be some time before more speculative offices are built other than as extensions to existing locations, and it will start to impact upon occupancy rates of existing business villages if an over-provision is made.

Preston Eastern Suburbs

General Market Overview

- 6.84 The Preston Eastern sub-area is dominated by large tracts of residential suburbia, to include the Fulwood, Sherwood, Brookfield and Ribbleton neighbourhoods, and by two very large concentrated areas of employment: the North Preston Employment Area (NPEA) and the Preston East Employment Area (PEEA). Within these two Employment Areas are a number of estates and developments, of mixed quality, size and use. Both are situated adjacent to the M6: the PEEA is east of the M6 and has open countryside surrounding much of it and the NPEA is west of the M6 with residential to its south and west.
- 6.85 The EA's outlie the main town of Preston hence are more driven by major infrastructure for locational factors than by accessibility to the town centre. Land availability is far less constrained than in the centre allowing expansion and new development to take place. This has encouraged developers to attempt new stock based on cheaper land values and an ability to provide better quality accommodation than attempting to refurbish older stock. There are still however some longer-standing industrial properties that offer lower quality accommodation albeit at cheaper rents.
- 6.86 The PEEA is being supported and promoted by English Partnerships although there is very little information about the project on EP's website.

Industrial Property

- 6.87 As mentioned above, the two main areas of supply are contained within the major Employment Area's. At Fulwood (NPEA) occupiers are varied and include the Lancashire Evening Post, SMD Holdings, Cash and Carry, and Fresh Food Distribution Centre, and on Red Scar (PEEA) major occupiers include Bodycare, distribution occupiers, and construction companies such as the Eric Wright Group.

- 6.88 Existing built employment stock totals 239,000 sq m (close to 2.6m sq ft) in 219 hereditaments. The averages 1,091 sq m per unit which is rather low considering that distribution is included in this sector and that more modern properties are being built, but it is still higher than any of the other Preston sub-areas set out in this study.
- 6.89 Looking at availability, we calculate that only 9,543 sq m is presently vacant, almost all of which is at Red Scar Business Park and Roman Way Industrial Estate. This constitutes only 4% of stock, a good (low) vacancy rate for this sector. We notice from our time spent on inspections that there appears to have been little built in this sector in recent years that is not occupied, but also that there is little speculative development on-going. This suggests a relatively steady equilibrium in the sector with expansion and new development having been measured and in accordance with needs.
- 6.90 The stock that is available ranges from a very small 39 sq m up to 2,230 sq m, which is not a particularly large size considering modern warehousing and logistics specification. There are no true high bay warehouses that we found details of in this area. Although warehousing and distribution as a sector has been growing, the geographical position of central Lancashire in the context of mainland Britain does not compare as well for this sector as for example the Midlands or the south-east which can more readily accommodate cross-European movements given regulations on driving times.
- 6.91 Looking further ahead, there is an abundance of committed land at Red Scar that, we estimate, could accommodate around 145,640 sq m of industrial space. In addition, there is an allocation of land that could provide a further 112,740 sq m of industrial property in the medium to longer term. This would increase capacity by a total of 258,000 sq m, which would double the amount of space that already exists.
- 6.92 Without specific data on completions and take-up it is difficult to assess what provision these figures equate to and how long this might afford supply for, however it is clear that Fulwood and Red Scar are important expansion opportunities for Preston given that the Inner sub-area has almost no expansion area that could accommodate large properties.
- 6.93 Most recent take-up of any size was in two lettings at Roman Way Industrial Estate. Roman Way offers the easiest of the estates to access, with its direct connections from the motorway at J31a, which create two new sites known as the east and west 'Loops' at Red Scar. Both transactions were completed earlier this year, although neither was in excess of 2,500 sq m. The tenants are relatively unknown companies, one being a wine distributor using internet sales. The size of deal accords with our comments on the logistics sector as above.

Offices

- 6.94 There is very little traditional or old office stock in the Eastern sub-area as much of the period and 1960s/ 70s premises are in the town centre and immediate fringes. Supply here is dominated by business villages at Fulwood and by what is now the opportunity to build new development at Longridge Road adjacent to the Red Scar estate.
- 6.95 Few premises are available to buy. The new business parks or villages generally offer a good quality product but on a leased basis, with developers holding back for tenants before constructing on a phased basis. There are no freehold premises currently available for occupation; where

- buildings are available for purchase this would only be post- construction and practical completion.
- 6.96 The overall offer comprises a wide range of sizes generally on a self-contained basis with parking on site. Quality is superior to much of that in the city centre, despite the number of refurbishments that are taking place there, but rents are higher at asking levels of £150-£161 per sq m (£14-£15 per sq ft) as opposed to around £86-£118 per sq m (£8-£11 per sq ft) in the city centre.
- 6.97 Forest Green at Fulwood and Millennium City Park are probably the largest of the new offerings, with buildings available as a whole or on a floor by floor basis. Unit sizes are larger than the 1980s and 1990s completions, showing aspiration to attract larger tenants and good quality covenants, and in line with changes in occupational requirements showing more emphasis on open plan and flexible space.
- 6.98 We calculate a total of around 5,578 sq m of built stock is available for occupation in this sub-area, as against a total built stock of 38,000 sq m recorded by the ONS figures. This equates to a vacancy rate of 14%, higher than others in the study boundaries, possibly reflecting the newer locations and more emerging markets with more speculative build than in established locations in the city centre.
- 6.99 There is no breakdown provided of completions over the last few years by sub-area or market sector, so it is difficult to quantify how quickly this stock has been built. Out-of-town development is generally responsive to enquiries and demand, so completion rates would have been a helpful indicator as to take-up over the last five years. Preston benefits from its connections to several different motorways (M6, M61, M65, M55) and could market itself as a cheaper alternative to Manchester, but if price is the ultimate consideration then the town centre or perhaps even Chorley looks a still more favourable option than this sub-area.
- 6.100 In terms of potential future employment space, quantum where permission has been implemented in part but not built out is circa 17,500 sq m in addition to the permitted but not started floorspace of approximately 6,750 sq m. Land for a further approximately 11,500 sq m of space has been allocated for future office use. Such permissions and allocations provide for the existing stock to at least double in this sub-area.
- 6.101 Demand in the Eastern area is mixed with local professional firms and some public sector organisations taking space.
- 6.102 More recently take-up has been lower in the office sector in general, and Preston has experienced a dip in activity in line with general UK performance.
- 6.103 Demand is limited in the large-occupier sector – it is likely that new buildings will ultimately become multi-let. The most recent transaction of notable size was the HSBC letting at Beech House, Forest Green, where 1,468 sq m was taken.
- 6.104 Current vacancy rates are running pretty high, explaining the lack of speculative development underway, as without firm evidence of returns, developers are likely to concentrate on more established markets.
- 6.105 The range of unit sizes on offer indicates that it will take some time for the business parks to near capacity. Out of town units are generally expected to house single occupiers in stand-alone units, and the offer to split buildings demonstrates developers’ willingness to be flexible but also their

intention to capture as many enquiries as possible and not alienate any sector of occupiers.

- 6.106 The potential for future growth is also well provided for so it is questionable whether a business park in this location would ever be fully let given natural turnover of tenants and the redevelopment lifecycle of buildings.

Preston Rural

General Market Overview

- 6.107 The Rural sub-area mainly comprises sparsely populated wards with a number of villages spread throughout the area, stretching north of Preston to the Fells and spanning the M6 just north of the M55. Commercial property in this sub-area is dominated by manufacturing premises, although none of the sectors is particularly active.

Industrial

- 6.108 With regard to industrial property, existing stock amounts to 35,000 sq m of space, with around three quarters of this in the manufacturing sector. With a total of 94 hereditaments this breaks down to an average of 372 sq m per unit. Unusually, the manufacturing figures show a higher average than for warehouses, with 419 sq m and 281 sq m respectively when the figures are broken down between these two sectors.
- 6.109 We found details of no vacant premises in this sub-area.
- 6.110 With regard to new premises, pipeline supply constitutes only the allocated Land north of Eastway, a large site of almost 25 ha that could support circa 81,444 sq m of space. This is a large site which, if fully developed, would more than double the existing total stock and of course concentrate it in a location on the edge of the Eastern Suburbs with no real distribution across the Rural sub-area. However, no planning permissions have been secured at this potential park, demonstrating the lack of confidence in starting on another large allocated site that would have to compete most directly with the NPEA in the short term.
- 6.111 Demand is likely to be very limited and come from local firms. Large-scale manufacturing or warehouse and distribution is not in demand in this Rural sub-area as might be expected given that there are numerous sites in the more urban sub-areas of this study.

Offices

- 6.112 This is also an extremely limited market comprising only 5,000 sq m of the 377,000 sq m of overall office stock for Preston. We were not able to find details of any vacant offices in the Rural sub-area. The average size of premises here is approximately 238 sq m which is small but corresponds with figures for the other outlying sub-areas within the boundaries of this study.
- 6.113 There are no office premises in the immediate pipeline however there is an extant permission for the old Whittingham Hospital site that supports up to 9,000 sq m of offices within a mixed use redevelopment; this is an English Partnerships project. This amount of floorspace would increase the existing total supply by 180%, and unless a corporate occupier could be found, for example that was seeking a new R&D facility or headquarters that offered a better quality environs than a town centre scheme, then we believe it unlikely that this will come forward as a single scheme. Infrastructure and

facilities for employees based on site could be an issue, but this is a mixed-use proposal and further residential is also planned.

- 6.114 It is possible that the landowner could require the employment accommodation to be built at stages throughout the lifetime of the overall project, simply to guarantee its delivery in the absence of any true perceived market demand. This would impact upon the value of the overall scheme to the landowner.
- 6.115 Overall, current demand in this sub-area is very much localised, patchy or infrequent. We consider it would be unlikely that a medium or large corporate would seek to have headquarters in a rural area such as this in preference to a more urban or suburban position.

South Ribble Leyland and Farington

General market overview

- 6.116 The Leyland and Farington sub-area is dominated by three large tracts of employment; one in the south east of Leyland St Ambrose, one north of Golden Hill Lane spreading in to Farington West, and one west of Schleswig Way at Moss Side. The remainder of the area in the south is densely developed established housing, with small pockets of commercial use, and to the north is open space forming the main wedge between Preston and Leyland.
- 6.117 This sub-area also benefits from the rail and road network, with the mainline running almost north-south straight through, and with junctions 28 and 29 (Leyland Way and Lostock Lane respectively) of the M6 providing access.
- 6.118 Essentially employment in this area is mainly in the industrial sector. Practically 90% of space is within the manufacturing and warehousing sector, with only 10% of space as offices. There are many large occupiers in the area, notably Leyland Trucks, which associate with the traditional car-making industry that the area name is partially associated with.

Industrial

- 6.119 Two thirds of the space in this sector is taken up by manufacturers, with the remaining third by warehouse/ distribution occupiers. Unusually, manufacturing premises are also around twice the average size of the warehouses, with 2,156 and 1,038 sq m respectively.
- 6.120 In terms of vacant space, 43,733 sq m is available in our review, which includes premises from the very small (individual storage units of 2-3 sq m) to the large (9,203 sq m at Leyland Business Park). This represents an excellent size range and includes a mix of ages and quality.
- 6.121 This does however represent a vacancy rate of over 10%, higher than the other sub-areas, and higher than the average over the period in 1998-2005 as depicted in Figure 4.1 (chapter 4). This is indicative that some larger premises are available which can easily change statistics – for example only three properties within the vacancy schedule make up over half of the available space (22,692 sq m), demonstrating that if these three properties were not included then the void rate would be somewhat different.
- 6.122 In terms of take-up, the only figure we have is that an average of less than ten hectares of employment land has been used in the South Ribble borough over the last five years (Chart 4.1) but no breakdown is given as to whether Leyland or other sub-areas were the primary source of this. As

Matrix Park has developed over the last few years it is to be expected that this forms part of this figure.

- 6.123 With regard to future supply, there is just over 30 hectares allocated without planning permission, a further 11 hectares of owner specific sites without planning permission, around 36 hectares of committed space within the allocated sites, and further land at Moss Side Test Track, an unallocated site without planning permission. This would afford a total of an additional 205,583 sq m of industrial accommodation and constitutes around eight to ten years of supply based on recent take-up.
- 6.124 Leyland is considered a prime location with its access to the motorway that is relatively simple. It provides an environment where there are existing businesses to create an active employment hub, and has room for expansion and growth within and around the boundary of existing estates. This should be encouraged where possible.
- 6.125 Sites for larger warehousing premises appear to be few, with unit sizes brought forward on the whole not offering the high bay 'big sheds' that distribution companies want. Such companies are not high employers however and the concentration of local manufacturing companies with good levels of local employment is important to retain.

Offices

- 6.126 Office stock in the Leyland and Farington area is very different from the industrial sector. Average unit sizes are small, showing 259 sq m on analysis of existing stock.
- 6.127 There has been a number of new buildings constructed at Matrix Park, and these are generally conceived as buildings to be made available to let in various smaller sizes, less than 300 sq m, with flexibility to be occupied as single buildings. The offices have not thrived in the same way that the industrial plots have done, and demonstrates the weaker market and less attractive location for office occupiers than town centres in general. In terms of new office space, there is also generally a larger step up in rental costs for new-build premises, and this may be proving the determining factor between units at Matrix Park and those for example in the town centre of Chorley or indeed Preston, where other traditional facilities (shops, transport, banks etc) are also on hand.
- 6.128 The vacancy rate for the office sector is running at around 12%, reflecting the increase in available space because of new-build but that take-up is lagging behind supply. Office parks can take a little while to become established and the office sector in general is moving into more difficult times.
- 6.129 Allocated sites in the Local Plan without planning permission are capable of supporting an additional 53,940 sq m of office space, increasing total existing stock by more than 100%. Further, almost 29,000 sq m of space is committed. It appears unlikely that office requirements will increase to fill such a doubling of space within the foreseeable future, and it is likely that such a provision would simply attract existing businesses to relocate rather than attract wholly new companies to this sub-area.

South Ribble Lostock Hall, Bamber Bridge & Penwortham

General market overview

- 6.130 The Lostock Hall sub-area comprises a band of wards between Preston to the north and Chorley to the south, and is crossed by the lines of railway and major roads, thereby making its accessibility excellent. Across much of this area is reasonably dense development, of a mix of uses typically found in towns, with very little open character except in the westernmost ward of Howick and Priory where it abuts the Ribble to the north.
- 6.131 As would be expected within such a built-up area, there is a gamut of employment space in all categories, with a number of concentrated areas of employment made natural nodes by the motorway communications. The industrial sector outweighs the office sector by almost 30 times in terms of overall space, but this reduces to around five times if considering the number of occupiers or businesses.
- 6.132 Part of Bamber Bridge East is divided from the remainder of the sub-area, being completely surrounded as it is by major roads and motorways and forming a triangular area almost wholly occupied by employment uses.

Industrial

- 6.133 Total built stock in the Lostock Hall sub-area comprises 491,000 sq m of space, split almost equally between manufacturing and warehousing.
- 6.134 This is positioned on a number of existing industrial and trading estates in the Lostock Hall sub-area, not least of which is the Walton Summit Centre at Bamber Bridge. This is one of the best known estates in the area and offers a whole range of accommodation, with some high quality modern premises. Its communications help to make it one of the prime locations in Bamber Bridge, and in this sub-area.
- 6.135 With regard to vacant property, the total 24,230 sq m affords a void rate of approximately 4.9%, which show a good level of occupancy but with a range of choice for potential tenants to move in to.
- 6.136 Of the available stock, we noted that a large proportion of it (around two thirds) was offered at Walton Summit Centre, and shows the contribution it makes towards employment in the area. Buildings are generally good quality allowing early occupation without capital expenditure or a wait for completion of a purpose-built unit. Units up to 9,000 sq m are available, making allowance for larger companies that might need to relocate near a motorway junction. This also allows other businesses already within the Centre that need to expand the knowledge that larger units are available.
- 6.137 At the other end of the scale there are a number of units available at South Ribble Enterprise Park, specifically aimed at start-up business. This offers a range of sizes up to around 93 sq m on short-term arrangements that allow flexibility in respect of timeframe required whilst offering certainty on financial needs, as terms are inclusive.
- 6.138 We have no information with regard to completions over the last five years so it is difficult to draw conclusions as to the take-up of new stock and long term trends.
- 6.139 Going forward, whilst there are no committed sites at Lostock Hall, there are allocated sites that would provide further space. South Rings, Kellett Lane and Club Street are the main three; together with the site north of

School Lane they offer a total 10.4 hectares of new land for employment purposes. We calculate this amounts to 15,867 sq m of accommodation in the B1(ind), B2 and B8 use classes, equivalent to around 3% of current overall space.

- 6.140 This does not provide a significant addition to the employment offering, but it is to be expected that with some rationalisation in occupational requirements this will cover the short to medium term needs. It is to be remembered that this sub-area already has a reasonably high coverage in terms of buildings to land, and there is little real opportunity to provide large new areas for development purposes other than in the westernmost areas, but this is not considered as desirable as the existing Bamber Bridge location.

Offices

- 6.141 Lostock Hall comprises around 18,000 sq m of offices, in 70 hereditaments, which forms an average of 257 sq m. This is very modest in size, being one of the lowest overall office stock figures across the sub-areas in this study, and it affords an abundance of accommodation for smaller companies. In terms of available premises, these follow the pattern with an average size of 177 sq m across the premises reviewed.
- 6.142 Nearly all property found to be available was in Bamber Bridge, notably in the South Preston Office & Technology Village, and at Ribble House. Ribble House is a refurbished property forming an ex-headquarters building, now having been split into four suites for letting purposes. This demonstrates the unlikelihood of securing a single occupier for a property in excess of 2,000 sq m. Indeed, this property still has the two largest available suites reviewed, at 823 and 783 sq m respectively. With the exception of its other two suites at 248 sq m each, there were no other properties available that exceeded 200 sq m. In terms of overall capacity however, the Office & Technology Village is a new park offering modern good quality accommodation, and again suites offered are on the small side to meet demand in the market place in this sub-area.
- 6.143 We do not have access to completion rates over the last five years, and it would have been helpful if for instance figures had been available of completions at the Office & Technology Village to demonstrate how quickly this type of opportunity is taken up.
- 6.144 In terms of future supply, circa 3,300 sq m of space have been committed at Lostock Land and Lostock Gas Works, which shows the relatively low levels of space deemed appropriate to secure. However, a further 38,600 sq m of space could potentially come forward on allocated sites, a vast amount in comparison to the current 18,000 sq m of stock. This suggests that capacity for office space is plentiful, in contrast to the capacity for industrial space, and sites should be brought forward in a way which addresses this apparent imbalance.

South Ribble Eastern Parishes

General market overview

- 6.145 The Eastern Parishes area is dominated by rural areas lying east of the M6/M61 motorway, with only a small number of villages and very little commercial property.

Industrial

- 6.146 Despite the rural dominance, there is an existing stock level of 64,000 sq m of industrial space in the Eastern Parishes, with approximately two thirds of this being manufacturing. Hereditaments total 60, giving an average size of over 1,000 sq m.
- 6.147 Interestingly, we only found details of one vacant premises, a unit of 1,600 sq m, which gives a vacancy rate of only 2.5%, lower than might be expected in an area of this character.
- 6.148 With regard to new premises, there is no pipeline supply unless the Aerodrome is included. Permission could be sought for a number or mix of uses in the B1/ B2/ B8 Use Classes, although to our knowledge none has been applied for to date. Development on this scale would be unprecedented in the Eastern Parishes.
- 6.149 In the absence of attracting new large companies on a site specific basis to the Aerodrome, then demand is likely to be very limited to local firms requiring expansion space or small start-up businesses. Large-scale manufacturing or warehouse and distribution is not in demand in the Eastern Parishes as might be expected.

Offices

- 6.150 This is an extremely limited market and comprises only 2,000 sq m of the total 94,000 sq m of the overall stock for the South Ribble area. We were not able to find details of any vacant offices in the Eastern Parishes. The average size of premises in the sub-area is approximately 222 sq m, which whilst small, is not that different to the average of the Leyland and Lostock Hall areas, which shows a reasonably consistent story across the South Ribble borough.
- 6.151 There are no sites for offices either committed or allocated for new office development, which is unsurprising. The Samlesbury Aerodrome site is also unallocated but remains a possible site for new office space if needed, however the potential on the site is in the order of 190,000 sq m – a figure so out of kilter with the quantum of existing office space in the sub-area that a comparison in terms of number of years supply is meaningless. This site alone would create a whole new office sub-market of its own if developed, however without any significant pre-let activity (or grant funding) it is highly unlikely that such development activity would be commenced.
- 6.152 Current demand in this sub-area is very much localised, patchy or infrequent. It would be highly unlikely that a medium or large corporate would seek to have headquarters in a more rural area such as this.

South Ribble Western Parishes

General market overview

- 6.153 The Western Parishes are similar in property characteristic to the Eastern Parishes, in that there are few densely built areas and hence no real commercial property market to speak of. The wards are further out of Preston than those to the south east of the city, so are peripheral to the more urban areas that sit between Preston and Chorley which have better transport links. The more open character to the area, with the Ribble forming its northern boundary, makes it less appropriate for dense commercial development.

Industrial

- 6.154 The Western Parishes have a lower level of existing stock than the Eastern Parishes, with only 31,000 sq m in 70 hereditaments, reflecting a much lower 443 sq m average.
- 6.155 When considering vacancies however, the only premises found available to let was a 251 sq m unit in New Longton, which would make the void rate 0.81%. It is more likely that the existing stock comprises a number of long-standing employers with little prospect of movement and occupier change, hence there are few properties actually available and the void rate appears low in comparison to a market norm.
- 6.156 In respect of new premises, there are no allocated or committed sites for new development, reflecting the more open character and lower accessibility, and therefore lower demand, of the sub-area.

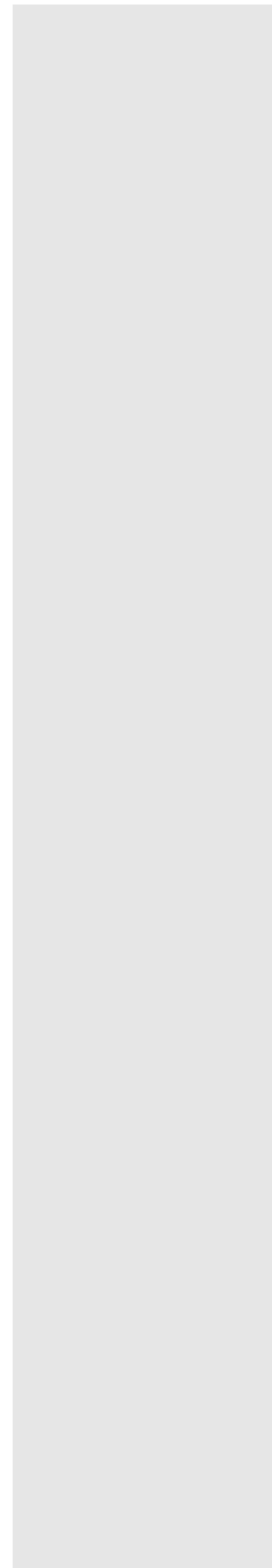
Offices

- 6.157 Existing stock in the Western Parishes is surprisingly high, with a total 28,000 sq m in 36 hereditaments. This produces an average unit size of almost 780 sq m, around three times the average in the rest of the Borough sub-areas.
- 6.158 We were unable to find any vacant premises however which belies the above statistic however, and implies there is not a churn of local tenants nor a high volume of local letting activity.
- 6.159 In terms of new premises, as with industrial property there are no allocated or committed sites and we doubt that any landowner would consider a high level of new development in this area.

Summary

- 6.160 Across the three areas of Chorley, Preston and South Ribble, Preston has the largest commercial property market with a strong bias towards industrial property. It has the largest areas for expansion at the designated Employment Areas on the outskirts of the city close to the motorway connections. Its city centre and inner areas are reasonably densely developed, and without going into open countryside there are few identified opportunities for large-scale new employment development in these locations. Opportunities for new premises are more likely to come from redevelopment of older stock.
- 6.161 The only sub-area where the industrial : commercial split is reversed is in Preston city centre, which has a larger quantum of office space. Much of this is older stock being refurbished and let in smaller units, but the market is slow and rents remain relatively inexpensive.
- 6.162 South Ribble has the second largest commercial market, with its industrial sector slightly out-stripping Preston's in terms of overall size. This shows the dominance of manufacturing in the Leyland area and its particular high importance to economic wealth in the Leyland and Lostock Hall sub-areas. In comparison the office sector has very low representation with just less than 10% of the overall market in space terms, and it is spread slightly more evenly across the borough. However it is unlikely that this sector will grow significantly, certainly in the outer parishes, given the more sparsely developed areas already in existence.

6.163 Chorley has a commercial property market around half the size of that in Preston, again with a heavy bias towards the industrial sector (around 85:15 split). Within the borough there is a heavy concentration of stock in the central sub area, and the eastern and western sub-areas offer very little in the way of offices particularly.



7. Forecasting Employment Land Requirements – Methodology

Introduction

- 7.1 This chapter details the methodology employed in forecasting the employment land requirements for the Central Lancashire Area, and the three local authority areas within it, through to 2021.
- 7.2 The methodology is based around forecasting all aspects of the local labour market, within the context of anticipated international, national and regional economic developments, and then translating the resultant local labour demand into floorspace and land requirements.
- 7.3 At the centre of the forecasts is a small area forecasting model specified by reference to local population, employment and other available data. This model is, in turn, driven by the labour market and output forecasts for the UK and for the North West region produced by the Cambridge Econometrics national and regional forecasting models.
- 7.4 All forecasting models are extremely data hungry. Unfortunately, much of the data that would ideally be needed in order to specify a full economic model of the Central Lancashire Area, and the three local authority areas within it, is not available. In particular, there is a dearth of information on the degree to which individual sectors trade with each other within the Central Lancashire Area and within each of the three local authorities areas.
- 7.5 In the absence of this information, it is hard to determine the extent to which growth or decline in one sector will directly impact on other local sectors. Similarly and in the absence of detailed information on household expenditure patterns, it is impossible to determine the extent to which increases in household disposable income will generate additional local economic activity and in what sectors.
- 7.6 In the absence of this level of detailed information there is inevitably a degree of estimation involved in producing forecasts of the Area's floorspace and land requirements. Despite this, the forecasts presented in this report are considered to be robust and to represent the best available assessment.
- 7.7 The following section details the way in which the model operates and explains how the various inputs into it have been devised. In this way, it provides detail of how the forecasts have been generated.

The Model

Population

- 7.8 The starting point for the model is the demographic structure of the current and future population of the Central Lancashire Area.
- 7.9 Rather than generate its own forecasts, the model makes use of forecasts generated by the Office for National Statistics and other data sources.
- 7.10 In this particular case, the data sets incorporated into the model include:
 - n population projections sourced from the Office for National Statistics;
 - n population estimates from the 2001 population census;

- n statistics for unemployment and economic activity from the Annual Population Survey; and
 - n statistics for employees in employment from the Annual Business Inquiry.
 - 7.11 The projections used within the model are those prepared by the Office for National Statistics (ONS) and show the population of the Central Lancashire Area growing around 11.7% from the base year 2001 to 2021. The rates of growth are, however, different, for the three local authorities that make up the City areas.
 - 7.12 Specifically:
 - n the Chorley population is estimated to grow from 98,107 in 2001, to 116,500 in 2021, a total growth of 18.7%.
 - n the Preston population is estimated to grow from 127,058 in 2001 to 135,400 in 2021, a total growth of 6.6%.
 - n the South Ribble population is estimated to grow from 103,045 in 2001 to 114,600 in 2021, a total growth of 11.2%
 - 7.13 These figures do not incorporate any additional strategies for growth that would be included in a 'policy on' population projection.
 - 7.14 The ONS projections are broken down by age and by gender. This is important, as the population figures are used, by the model, to generate numbers of economically active persons within the population and hence the resident labour-force.
- Economic Activity Rates
- 7.15 Translating the resident population figures into workforce estimates requires assumptions to be made about current and future economic activity rates.
 - 7.16 The economic activity rates used in the model are specified by reference to age and gender, such that changes in the demographic structure of the area generate changes in the number economically active.
 - 7.17 The model assumes that no individual aged under 16 is economically active. It also assumes that economic activity can and does continue after normal retirement age, but with the proportion of those economically active declining with age.
 - 7.18 Economic activity rates have been sourced from Office for National Statistics. These show a slightly declining rate of economic activity from 2004 to 2021 principally due to declining rates of economic activity in those aged 60+. However, due to a growing population, total activity is forecast to increase.
 - 7.19 The derived model of the economy produces its own estimates of economic activity. These show a general increase in economic activity rates principally due to an increase in female economic activity rates over time.
 - 7.20 Outside of the general economic trends, activity rates are assumed to increase in response to a tightening labour market. As such, the model assumes that as the economy grows and demand for labour increases, so the proportion of the population that is economically active rises.
 - 7.21 The model does not assume, however, that labour supply and labour demand equate to each other. Rather, it forecasts labour supply and labour demand independently and only increases the supply of labour,

through the above mentioned increase in activity rates, should the labour market start to overheat.

- 7.22 Even so, the increase in activity rates is not set so as to restore balance to the labour market. Rather, the rate of increase is determined independently, as an exogenous variable, and only allows for a relatively modest increase in activity rates, year on year.
- 7.23 In this way and as with the real economy, imbalances in the labour market lead to unemployment or to an increase in in-commuting or to an increase in the proportion of the economically active population that have more than one job.
- 7.24 In practice, the model shows the economic activity rate (total number economically active expressed as a percentage of the proportion of working age) as generally following an upward trend over the forecast period. This is, in part, due to a rising level of economic activity amongst females and, in part, due to an increase in the number of people electing to work beyond normal retirement age.
- 7.25 The economic activity rate of the working age population is forecast to increase from 80.1% in 2001 to 86.8% in 2021. This is most significant in Preston with a low initial rate of economic activity of 75.9% increasing to 80.9% by 2021.

Employees in Employment

- 7.26 The base data used in forecasting the number of employees in employment in the Central Lancashire Area is sourced from the Annual Business Inquiry. This employer-sourced information provides an estimate of the number of employees in employment whose jobs are based within the Central Lancashire Area, and the three local authority areas within it.
- 7.27 The information from the Annual Business Inquiry, (ABI), is accessed as a number of data series together running from 1998 through to 2005. The data is drawn down from NOMIS at a four digit minimum list heading level.
- 7.28 The first stage in the forecasting process is to examine the data in order to identify and, where necessary, correct any miscoding or other obvious data errors. This exercise also facilitates a degree of familiarisation with the structure of the local economy.
- 7.29 Information on the agricultural sector is frequently lacking for some years. Where necessary, trend analysis is used to fill in the gaps.
- 7.30 For forecasting purposes, the employment data is aggregated into 28 different industrial sectors. These are the industrial sectors used by Cambridge Econometrics in reporting their regional and associated national forecasts. The aggregation process automatically removes some of the data series inconsistencies. Estimation and allocation techniques are used to remove the remainder.
- 7.31 Aggregation also has the benefit that it hides many of the sensitive data entries contained within the raw data and thereby facilitates publication.

Self Employment

- 7.32 Although information on self-employment is available from the Labour Force Survey, (LFS), it is notoriously unreliable at a small area level. This is due to the relatively small numbers that are sampled by the LFS.

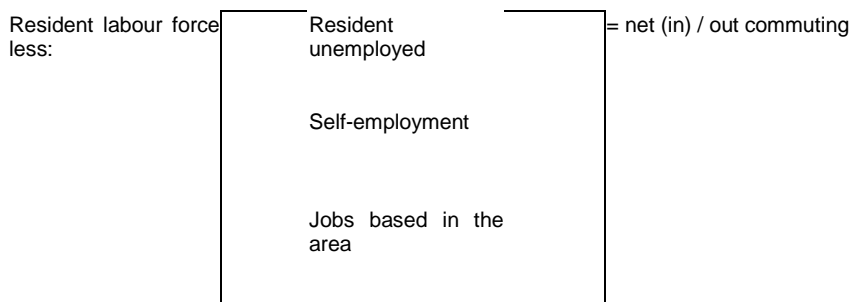
- 7.33 In order to overcome this problem, information from the 2001 Population Census is used to estimate the proportion of the Central Lancashire Area resident population that is self-employed.
- 7.34 Specifically, the Population Census information is used to determine the ratio of self-employment to employees in employment by gender and by industrial division.
- 7.35 The assumption is then made that each ratio will remain constant over the forecast period. The consequence of this is that as employment in a particular sector rises or falls, so self-employment in that sector will also proportionately rise or fall.

Employment Projections

- 7.36 The employment projections for the Central Lancashire Area are substantially driven by the forecasts for the North West region, produced by Cambridge Econometrics.
- 7.37 This does not mean that the Central Lancashire Area economy is assumed to be a microcosm of the North West regional economy. Rather, the model assumes that the overall performance of the Central Lancashire Area economy is determined by a combination of:
- n local factors within each industrial sector;
 - n the overall industrial structure; and
 - n regional, national and international factors.
- 7.38 Of these, local factors are determined by reference to the historic performance of the local sector, relative to the regional sector, and by reference to time trends. As such, the model allows a local sector to behave differently from the same sector, both regionally and nationally.
- 7.39 As the model forecasts at an industry level, it explicitly recognises that the economy of the Central Lancashire Area has a different structure from that of the North West region and that this will, irrespective of other factors, produce different growth rates for the Area's economy from those of the North West region and the UK. Similarly each of the individual Local Authorities have a different structure, which are reflected in each of the individual models.
- 7.40 Regional, national and international factors are taken on board through using the Cambridge Econometrics model to drive the local forecasting model. Effectively, the local model allocates employment within the North West region between the Central Lancashire Area, and each of the three Local Authorities, and the rest of the North West.
- 7.41 This allocation is performed at a 28-industry level and, as indicated above, takes account of factors local to the Central Lancashire Area in the allocation. As the model produces forecasts for employees in employment, it also produces forecasts for self-employment to give a total employment figure.
- 7.42 All of the forecasts are reviewed in order to determine that they look reasonable and are consistent with known events such as major factory closure, expansion or inward investment events. In practice, little manual adjustment is ever warranted.

Commuting

- 7.43 In producing a comprehensive picture of the Central Lancashire Area labour market, the model needs to take account of the extent to which jobs within the Central Lancashire Area are taken by people who are resident outside of it in places such as East Lancashire, Flyde, Manchester and Liverpool. Equally, it needs to take account of the extent to which the Central Lancashire Area residents hold down jobs outside of it.
- 7.44 This requirement arises because the population and labour force forecasts are residence based and the employment forecasts are place of employment based.
- 7.45 Normally, up to date information on in- and out-commuting is very difficult to obtain, such that net commuting has to be estimated, through the model, for a given year when all other elements of the labour market are known. Specifically, the level of net in- or out-commuting is derived as the balancing factor such that:



- 7.46 If the net in-commuting figure is a negative, it means that there is a net inflow of residents into employment from outside the Area. If the net in-commuting figure is positive, the Area is a net exporter of labour.
- 7.47 In the case of the Central Lancashire Area, analysis has taken place for the 2001 Population Census origin-destination statistics in order to gain a full understanding of commuter flows, both within the Central Lancashire Area and between this Area and other parts of the UK.
- 7.48 This analysis shows that, in 2001, the Central Lancashire Area had a resident working population of 157,000 of whom 119,000 (76.1%) worked in the Area, mainly in Preston (48.4%), followed by South Ribble (27.5%) and then Chorley (24.1%). As is to be expected, intra authority flows were the most significant especially for Chorley, of which 66.1% of the workforce resided within the District. As more significant urban centres, the proportion of the workforce comprised by local residents was lower for South Ribble (54.9%), and Preston (49%).
- 7.49 The analysis of origin-destination statistics shows that a fairly low number of the jobs within the Central Lancashire Area were taken, in 2001, by in-commuters. Specifically, 23.9% of the available jobs were taken by in-commuters to the area, with the main origins of those commuters being Wigan (3.2% of total employment origin), Fylde (2.9%), Wyre (2.6%), Blackburn with Darwen (2.5%), and Ribble Valley (2.4%).
- 7.50 As such, the Central Lancashire Area is characterised by relatively low levels of both commuting as most of it is contained within the area. In total, there is a small level of net in-commuting figure for the Central Lancashire

Area of just over 1,000 people. However, this is due to high levels of net-in commuting to Preston of over 22,000 workers, which mitigates the modest levels of out-commuting from Chorley, of almost 13,000 workers and South Ribble, of almost 10,000 workers.

- 7.51 The model does not assume that net commuting remains unchanged over time. Rather, the model looks at the relative performances of the Central Lancashire Area labour market and the labour market in the rest of the North West and assumes that net in-commuting reduces if demand for labour in the rest of the North West grows at a faster rate than the demand for labour in the Central Lancashire Area, and vice versa.

Double Jobs

- 7.52 One feature of the labour market over recent years has been a growth in the number of people that have more than one job. Typically, people with more than one job have one full-time job and one part-time job, rather than a portfolio of part-time jobs.¹
- 7.53 The model works on the assumption that the incidence of individuals with more than one job will continue to grow over time, but with males more likely to have two jobs than females.
- 7.54 Balancing the Central Lancashire Area labour market for 2001 requires there to be just over 9,000 people in the City area with more than one job, assuming that no individual has more than two jobs. This amounts to 1 in every 22 of the Area's resident working population having more than one job.
- 7.55 The proportion of people with more than one job appears high, relative to a national figure of 1 in every 35. It may be that a high proportion of households in the Central Lancashire Area require income from double jobs because of a high incidence of low paid employment.

Unemployment

- 7.56 The model mirrors the labour market in that it treats unemployment as a residual.
- 7.57 In this context, unemployment is the difference between the resident labour force in the Central Lancashire Area and those who are employed or self-employed, irrespective of whether the employment or self-employment is based in the Central Lancashire Area.

Value Added

- 7.58 In the absence of information on value added specific to the Central Lancashire Area, the model assumes that value added per employed person in the Central Lancashire Area is the same, in each sector, as is value added per employed person in that sector in the North West region.
- 7.59 Equally, the model assumes that labour productivity gains within each sector in the North West will be mirrored in the Central Lancashire Area. As such, any overall differential performance between the Central Lancashire Area and the North West region is solely the result of differences in the two areas' industrial structures.

¹ M Simic and S Sethi, People with Second Jobs, Labour Market Trends, May 2003.

Employment Land Requirement

- 7.60 The model amalgamates the employment and self-employment projections into broad headings of: manufacturing, construction, retail in-town, retail out of town, hotels and catering, transport and communications, finance and business services, public administration and defence, education and health, and other services.
- 7.61 Standard square metres per employed person figures are then applied for each of the broad headings in order to produce the floorspace required to accommodate the stated number of people.
- 7.62 Finally, employment density estimates are applied to the floorspace requirements in order to arrive at estimates of the employment land requirement for each of the broad headings.
- 7.63 Appropriate amalgamations of headings are then used in order to arrive at the employment land requirements for each category.
- 7.64 In addition, more than one set of floorspace and employment land requirement figures were calculated. Specifically, one set was produced using the standard floorspace and density levels specified in the Office of the Deputy Prime Minister (ODPM) (now Department for Communities and Local Government (DCLG)) guidance², one set was produced using the Central Lancashire Area specific Valuation Office derived figures and one set was produced based on the findings from a survey of 320 local employers, at least 100 from each of the Local Authorities.
- 7.65 Whilst these different sets of floorspace and land requirements were generated, the figures presented in the following section of this report are primarily based on local findings rather than on the ODPM standards. For example they will represent the key industries in the area more effectively as well as the local market forces governing land and premises. The ODPM standards do, however, offer a useful comparison and “sanity check” for the other two methods of analysing land requirements.
- 7.66 This approach has been adopted because it better reflects the current employment and site densities in the Area, and the three Local Authorities, which are, themselves, better indicators of future densities than are any other measure, including national standards.
- 7.67 The main reasons for this are twofold. Firstly, those manufacturing activities already operating in the Area, and the three Local Authorities, are likely to constitute the occupiers of most of the manufacturing floorspace in the future. Many will continue to occupy the same buildings on the same sites. As such, current manufacturing floorspace and site densities will dominate future manufacturing and floorspace site densities and thereby determine the quintessence of manufacturing in the area.
- 7.68 Secondly, new office developments are being focused in the Area’s business parks and not purely in town centre locations, in which major development is limited across the Central Lancashire Area. This means that floorspace and site densities within new developments will replicate those within existing developments rather than deviate from them.
- 7.69 The overall land requirement figures show that despite an increase in total employment, there is a steady decline in employment land requirement from 2006 to 2021. This is principally due to the continued loss of

² Employment Land Reviews Guidance Notes, ODPM (now DCLG), 2004

manufacturing employment, with high employment densities in terms of floorspace, and growth of service industries, such as wholesale and retail sectors with low employment densities in terms of floorspace. However, this varies considerably in terms of the three Local Authorities.

- 7.70 The total land requirement for Chorley is forecast to decline significantly due to a combination of declining levels of employment in Manufacturing and Construction. By contrast, the total requirement for Preston is forecast to increase slightly due to sustained increased in requirements for Offices, Distribution and Warehousing. The land requirement for South Ribble is forecast to remain relatively stable but increase slightly as losses in the requirement for manufacturing floorspace is more than mitigated by growth in requirement for Offices and Construction land.
- 7.71 The use of local figures is a recommendation within the ODPM guidelines.

Findings of the Forecasting Model

Introduction

- 7.72 The following details the principal outputs derived from the small area forecasting model for the Central Lancashire Area, and the three associated models for Chorley Borough, Preston City and South Ribble Borough.

Population

- 7.73 At the time of the 1991 Population Census, the total population of the Central Lancashire Area was 313,112. By 2001, this number had grown to around 328,210.³
- 7.74 Based on forecasts produced by ONS, it is estimated that the Central Lancashire Area has a current (2007) population of 344,300.
- 7.75 ONS's forecasts suggest that the population of the Central Lancashire Area will continue to rise in the foreseeable future, reaching 358,400 by 2016 and 366,500 by 2021.
- 7.76 The way that the population forecasts for each of the three Local Authorities break down are shown in Figure 2.1.
- 7.77 As this shows, all three local authorities are forecast to increase in terms of population from 2007 to 2021. The rates of growth are different though; the total change from 2007 to 2021 is highest within Chorley (10.5%), then South Ribble (6.9%) and Preston (2.8%).

Table 7.1 Population Forecasts by LA

Year	ONS			
	2007	2011	2016	2021
Chorley	105,400	108,500	112,600	116,500
Preston	131,700	132,600	133,900	135,400

³ Figures from standard table SO16/SO28 from NOMIS/ONS. Population figures for Chorley and Preston in particular are unstable when further analysis (in this case the age of residents) is required. For the purposes consistency in forecasting the working age population these lower figures have been used throughout this report.

	ONS			
South Ribble	107,200	109,200	111,900	114,600
City Area	344,300	350,300	358,400	366,500

Demographic Structure

- 7.78 Whilst the overall size of the population has implications both for the level of demand for housing land and for the level of demand for local services, it is the structure of the population that is of more concern in terms of the demand for employment land.
- 7.79 This is because the age structure and gender of the population largely determines the size and structure of the resident labour force.
- 7.80 The following figures, (Table 2.2 and 2.3), compare the structure of the Central Lancashire Area population at 2021 by broad age group.

Table 7.2: Population Projections for the Central Lancashire Area by Age and Gender, 2007

	ONS		
Age	Male ('000)	Female ('000)	Total ('000)
0-15	33.0	31.6	64.6
16 to normal retirement age	113.6	103.0	216.6
Over normal retirement age	23.2	39.8	63.0
Total population	169.8	174.4	344.2

Source: ONS (derived);

Table 7.3: Population Projections for the Central Lancashire Area by Age and Gender, 2021

	ONS		
Age	Male ('000)	Female ('000)	Total ('000)
0-15	33.0	31.8	64.9
16 to normal retirement age	114.9	103.9	218.7
Over normal retirement age	33.5	49.4	82.9
Total population	181.4	185.1	366.5

Source: ONS (derived);

- 7.81 As this shows, population growth is concentrated in those aged over normal retirement age. Although there is forecast to be a slight rise in the normal working age population, the number of residents aged under 16 is expected to remain roughly the same. At the present time, retirement age is still considered to be age 65 for males and 60 for females.

7.82 Further detail is contained in the following figure, (Table 2.4).

Table 7.4: Comparison of Population Forecasts by Age

	2007	2021
Age		
0-15	18.8%	17.7%
16 to normal retirement age	62.9%	59.7%
Over normal retirement age	18.3%	22.6%
Total	100.0%	100.0%

7.83 The proportion of the population of the Lancashire City Area over normal retirement age is forecast to increase from 18.3% in 2007 to 22.6% by 2021. Accordingly this results in a slight decrease in the proportion of the population of normal working age and below normal working age despite a relatively stable population level within these age groups. This has serious implications for the overall size of the City-Region labour force, as activity rates for those above retirement age are typically lower.

Activity Rates

7.84 The activity rates used in the model were derived from ONS forecasts. Activity rate forecasts are no longer produced for each Government Office Region and so national projections are used to drive labour force growth.

7.85 The annual change in national activity rates were applied to the initial figure for economic activity estimated by the Annual Population Survey (2006 data) for each of the three District population forecasts in order to arrive at a total Central Lancashire Area labour force projection. The ONS activity rate figures are shown in figure 7.5 below.

Table 7.5: ONS Activity Rate Assumptions – 2007, 2011, 2021

Age	2007 (%)	2011 (%)	2021 (%)
15-19	53.9	52.9	52.3
20-24	75.8	75.8	75.7
25-29	84.9	84.4	84.1
30-34	84.3	84.6	84.7
35-39	83.8	84.1	84.2
40-44	84.2	84.2	84.2
45-49	85.4	85.4	85.4
50-54	85.0	85.1	85.1
55-59	81.6	82.7	83.4
60-64	70.9	72.5	73.4
65-69	42.9	45.1	47.1
70-74	13.9	14.9	15.4

Source: ONS

- 7.86 Overall, the figures indicate a marginal reduction in economic activity rates for 15-19 year olds and for 25-29 year olds. In contrast, economic activity rates for those aged 50+ are forecast to rise steadily including for people above retirement age.
- 7.87 Census data indicates that activity rates in the Central Lancashire Area are substantially below national estimates. Therefore, labour force figures may be subject to over or under-statement dependent on whether the activity rates converge with the national average or continue to remain below the national average by the same proportion.
- 7.88 For the purpose of this model, we have assumed that activity rates within the Central Lancashire Area do not converge with national activity rate forecasts but change in line with national forecasts. Although, this is a conservative assumption there is likely to be slight over-statement of labour force figures.

Labour Demand

- 7.89 The Central Lancashire Area economy is relatively manufacturing dependent, when compared with the rest of the North West and the rest of the UK. Nevertheless, it is service activities that dominate all three economies. This is shown in the following figure.

Table 7.6: Comparative Employment Structures, 2007

	Central Lancashire	North West	UK
Primary	0.7%	0.7%	1.7%
Manufacturing	13.8%	11.6%	10.3%
Utilities and Construction	6.4%	6.6%	7.2%
Services	<u>79.1%</u>	<u>81.0%</u>	<u>80.8%</u>
Total	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

Sources: Cambridge Econometrics, NOMIS

- 7.90 As can be seen in figure 7.7, below, manufacturing is most prominent in South Ribble, whilst Preston and Chorley are both below the national average in terms of manufacturing employment. South Ribble also has a substantially higher rate of employment in utilities and construction. Within Chorley and Preston, employment in service industries is above the regional and national average and employment in utilities and construction below the regional and national average. As this shows, the composition of employment within South Ribble severely skews the employment composition of the Central Lancashire Area towards manufacturing employment and away from service employment. This is despite Chorley and Preston being above the national and regional average for employment in services.

Table 7.7: Comparative Employment Structures, 2007

	Chorley	Preston	South Ribble
Primary	1.2%	0.4%	1.0%
Manufacturing	6.4%	10.4%	25.5%
Utilities and Construction	6.1%	4.3%	10.4%
Services	<u>86.4%</u>	<u>84.9%</u>	<u>63.1%</u>
Total	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

- 7.91 Within manufacturing, employment in the Central Lancashire Area is concentrated in the Motor Vehicles sector, which accounts for around 26.3% of all manufacturing employment. Other sectors accounting for over 5% of manufacturing employment include: Other Transport Equipment (18.3%), Food & Drink (9.7%); Paper, Printing & Publishing (8.2%); Basic Metals & Metal Products (8.2%); and Rubber & Plastic Products (5.7%).
- 7.92 Within the service industries, the Central Lancashire Area is relatively over-represented in Distribution (9.2%) and Public Administration, Education & Health (38.5%) compared to the regional and national average. It is under-represented Transport & Communications (5.4%) Financial Services (1.7%) and Other Services (4.1%), although it is slightly above the national average for employment in Other Business Services (21.7%). The following figure, (Table 7.8), provides more detail:

Table 7.8: Comparative Services Sector Employment, 2007

	Central Lancashire	North West	UK
Retailing	12.4%	13.3%	12.4%
Distribution	9.2%	8.0%	7.6%
Hotels & Catering	7.0%	7.7%	7.7%
Transport & Communications	5.4%	8.0%	7.4%
Financial Services	1.7%	3.8%	4.3%
Other Business Services	21.7%	18.3%	21.0%
Public Administration, Education & Health	38.5%	33.1%	31.5%
Other Services	4.1%	7.7%	8.0%
Total	100.0%	100.0%	100.0%

Sources: Cambridge Econometrics; Nomis

- 7.93 At Local Authority Level, there is some variation in terms of employment in service industries. As the economic centre of the City area, Preston has a higher level of Retailing (13.0%), Public Administration, Education & Health (41%) and Financial Services (2.2%). South Ribble has a far higher level of both Distribution (14.4%) and Transport & Communications (8.1%) as these activities are complementary to manufacturing which is far more prominent in South Ribble. Chorley has a higher level of Hotels & Catering (8.8%) and Other Business Services (29.0%) suggesting that it may be a more affluent area. This is shown in figure 7.9, below.

Table 7.9: Comparative Services Sector Employment, 2007

	Chorley	Preston	South Ribble
Retailing	12.2%	13.0%	11.3%
Distribution	7.5%	7.8%	14.4%
Hotels & Catering	8.8%	6.2%	7.1%
Transport & Communications	2.3%	5.6%	8.1%
Financial Services	1.3%	2.2%	0.7%
Other Business Services	29.0%	20.9%	16.5%
Public Administration, Education & Health	33.2%	41.0%	37.5%
Other Services	5.7%	3.4%	4.5%
Total	100.0%	100.0%	100.0%

- 7.94 The forecasts through to 2021 indicate that manufacturing employment within the Central Lancashire Area will continue the decline seen over recent years such that, by 2021, manufacturing will account for only 11.0% of total employment in the overall study area. This is shown in the following figure, (Table 7.10) and by local authority in Table 7.11.

Table 7.10: Forecast Relative Shares of Employment in 2021

	Central Lancashire	North West	UK
Primary	0.4%	0.4%	1.1%
Manufacturing	11.0%	9.3%	8.1%
Utilities and Construction	6.0%	6.3%	7.3%
Services	<u>82.5%</u>	<u>83.9%</u>	<u>83.5%</u>
Total	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

Sources: WM Enterprise Consultants; Cambridge Econometrics

- 7.95 The decline in manufacturing employment does not mean, however, that the overall significance of manufacturing, as a generator of value added in the Central Lancashire Area economy, will similarly decline. Rather, the success of manufacturing in the Central Lancashire Area, as in the rest of the North West and the UK, will be dependent upon increased labour productivity and upon increased concentration on the production of higher value added, non-commodity products.

Table 7.11: Forecast Relative Shares of Employment in 2021

	Chorley	Preston	South Ribble
Primary	0.7%	0.2%	0.6%
Manufacturing	4.9%	8.0%	21.7%
Utilities and Construction	5.7%	4.0%	10.3%
Services	<u>88.7%</u>	<u>87.8%</u>	<u>67.4%</u>
Total	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

Sources: WM Enterprise Consultants; Cambridge Econometrics

- 7.96 By estimating GVA growth, it is expected that the proportion of value added generated from manufacturing activities in the Central Lancashire Area will remain relatively constant at around 14.4% of value added for the City Area from 2007 to 2021.

- 7.97 Over the same period, the service sector's share of gross value added in the Central Lancashire Area is expected to rise from a current 66.5% in 2007 to reach 69.3% by 2021. This is a broadly proportional increase in line with an increase in the service sector's share of total employment rising from 79.1% to 82.5%, over the same period.

- 7.98 The forecast for the service industries by 2021, is shown in figure 7.12, below:

Table 7.12: Comparative Services Sector Employment, 2021

	Chorley %	Preston %	South Ribble %
Retailing	11.99%	12.93%	11.30%
Distribution	7.12%	7.50%	13.90%

	Chorley %	Preston %	South Ribble %
Hotels & Catering	8.19%	5.84%	6.75%
Transport & Communications	2.25%	5.50%	8.05%
Financial Services	1.31%	2.20%	0.67%
Other Business Services	31.57%	23.10%	18.28%
Public Administration, Education & Health	31.53%	39.27%	36.13%
Other Services	6.03%	3.67%	4.93%
Total	<u>100.00%</u>	<u>100.00%</u>	<u>100.00%</u>

7.99 Within the Central Lancashire Area service sector, it is the other business services sector (computing, services, research and development, accountancy, architectural and legal services, recruitment, cleaning and the like) that is expected to be the major source of new job opportunities, increasing its proportion of service employment by 2.2% within the area from 2007 to 2021. This is followed other services which is also forecast to increase its share of service employment.

7.100 Within the three local authorities, public administration, education & health is forecast to continue to dominate service employment in Chorley, Preston and South Ribble retaining a share of service employment in 2021 of 31.53%, 39.27% and 36.13% respectively. This is despite the total share of public administration, education & health declining slightly.

7.101 Other Business Services are forecast to increase in Chorley, Preston and South Ribble by 2.6%, 2.2% and 1.8% respectively. In contrast, employment in hotels & catering is forecast to decline 0.6%, 0.4% and 0.3% respectively reflecting the lack of opportunities for tourism in the Central Lancashire Area.

Commuting

7.102 The Central Lancashire Area is both an exporter and importer of labour to other parts of Lancashire, the North West region and elsewhere. However, census data indicates that the majority of City Area employment in 2001 came from residents within the Central Lancashire Area.

7.103 Our labour forecasts suggest that commuting will vary considerably for the Central Lancashire Area, adjusting to the relative growth and employment opportunities of the of the Area's economy. According to 2001 data, the Central Lancashire Area had a balanced net commuting figure, this is expected to vary but remain close to a balanced figure.

Double Job Adjustment

7.104 The forecasts assume that, by 2021, the number of jobs within the Central Lancashire Area that are taken by individuals who have another job will be around 10,600. This amounts to around 5.2% of all jobs in the Area. At present, around 4% of the UK workforce has more than one job and so the Central Lancashire Area broadly accords with this rate.

Labour Market Summary

7.105 The following provides summaries of the model's population projections for the Central Lancashire Area labour market based on the on the ONS population projections with inputs from Census data, Annual Population Survey data and Annual Business Inquiry data, all forecast to 2021. Figure 7.13 is a composite of the three separate local authority forecasts, figures 7.14, 7.15 and 7.16 are for Chorley, Preston and South Ribble respectively.

Table 7.13: Central Lancashire Area Labour Market Projections Based on Small Area Forecasting Model's Population Projections

	2001	2006	2007	2008	2009	2010	2011	2016	2021
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	328.2	342.7	344.3	345.8	347.2	348.8	350.3	358.4	366.5
Of which: of normal working age	205.3	216.2	216.6	216.6	217.4	217.1	218.1	217.5	218.7
over normal retirement age	55.1	61.6	63.0	64.8	65.9	67.7	68.8	76.5	82.9
Labour force (all ages)	164.5	179.9	181.1	182.2	183.4	184.4	185.5	188.7	189.8
Plus net in commuting	0.1	1.2	0.5	-0.1	-0.6	-0.6	-0.6	0.9	2.5
Full-Time Students economically active	7.7	9.2	9.4	9.6	9.8	9.9	10.0	9.9	9.3
Local Employment	172.3	190.2	191.1	191.7	192.6	193.7	194.8	199.5	201.7
Net local jobs	165.5	182.5	182.3	183.0	183.7	184.7	185.6	190.2	194.8
Unemployment	6.8	7.8	8.7	8.8	8.9	9.0	9.2	9.4	6.9

Source: WM Enterprise Consultants

Table 7.14: Chorley Labour Market Projections Based on Small Area Forecasting Model's Population Projections

	2001	2006	2007	2008	2009	2010	2011	2016	2021
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	98.1	104.6	105.4	106.2	106.9	107.7	108.5	112.6	116.5
Of which: of normal working age	62.4	66.6	66.8	66.5	66.7	66.8	67.4	67.2	68.5
over normal retirement age	15.9	18.7	19.3	20.4	21.0	21.7	22.2	25.8	28.2
Labour force (all ages)	51.3	56.3	56.8	57.3	57.8	58.1	58.4	60.1	61.0
Plus net in commuting	-12.6	-17.2	-17.5	-17.5	-17.5	-17.4	-17.5	-17.4	-17.4
Full-Time Students economically active	1.8	1.3	1.4	1.4	1.4	1.4	1.4	1.3	1.3

	2001	2006	2007	2008	2009	2010	2011	2016	2021
Local Employment	40.4	40.4	40.7	41.3	41.7	42.1	42.4	44.0	44.9
Net local jobs	38.5	38.6	38.8	39.0	39.2	39.4	39.7	41.0	42.3
Unemployment	1.9	1.9	2.0	2.3	2.5	2.6	2.7	3.0	2.5

Source: WM Enterprise Consultants

Table 7.15: Preston Labour Market Projections Based on Small Area Forecasting Model's Population Projections

	2001	2006	2007	2008	2009	2010	2011	2016	2021
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	127.1	131.5	131.7	131.9	132.1	132.4	132.6	133.9	135.4
Of which: of normal working age	79.1	83.9	84.1	84.1	84.5	84.6	84.7	84.5	83.9
over normal retirement age	20.9	22.0	22.2	22.4	22.5	22.8	23.0	24.4	26.2
Labour force (all ages)	60.0	66.1	66.5	66.7	67.1	67.3	67.6	68.2	67.8
Plus net in commuting	22.4	27.8	27.8	27.8	27.9	27.9	27.9	29.6	31.2
Full-Time Students economically active	4.0	5.1	5.2	5.3	5.4	5.4	5.5	5.4	5.1
Local Employment	86.4	98.9	99.5	99.8	100.3	100.5	101.0	103.2	104.2
Net local jobs	83.2	95.0	95.2	95.6	96.0	96.6	97.1	99.6	102.3
Unemployment	3.2	3.9	4.3	4.2	4.3	4.0	3.9	3.6	1.9

Source: WM Enterprise Consultants

Table 7.16: South Ribble Labour Market Projections Based on Small Area Forecasting Model's Population Projections

	2001	2006	2007	2008	2009	2010	2011	2016	2021
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	103.0	106.6	107.2	107.7	108.2	108.7	109.2	111.9	114.6
Of which: of normal working age	63.8	65.7	65.7	66.0	66.2	65.7	66.1	65.9	66.4
over normal retirement age	18.3	20.9	21.5	22.0	22.4	23.2	23.6	26.3	28.5
Labour force (all ages)	53.1	57.5	57.8	58.2	58.6	59.1	59.4	60.4	61.0
Plus net in commuting	-9.6	-9.4	-9.8	-10.4	-10.9	-11.0	-11.1	-11.2	-11.3
Full-Time Students economically active	1.9	2.7	2.8	2.9	3.0	3.0	3.1	3.1	2.9

	2001	2006	2007	2008	2009	2010	2011	2016	2021
Local Employment	45.4	50.9	50.8	50.7	50.6	51.1	51.4	52.3	52.7
Net local jobs	43.8	49.0	48.4	48.5	48.6	48.8	48.9	49.6	50.3
Unemployment	1.7	1.9	2.4	2.2	2.0	2.3	2.5	2.7	2.4

Source: WM Enterprise Consultants

7.106 The principal findings from these labour market projections can be summarised as follows:

- n The total population of the Central Lancashire Area is forecast to increase to over 366,000 by 2021. This represents a total increase for the area of 11.7% from 2001-2021. Population growth is forecast to be highest within Chorley (18.7%) and lowest within Preston (6.6%). South Ribble is roughly around the Central Lancashire Area average at 11.2%.
- n The projected labour force is forecast to be almost 190,000 by 2021. This represents a total increase for the area of 15.4% from 2001-2021. Once again, labour force growth is forecast to be highest within Chorley (18.8%) and lowest within Preston (13.0%) with South Ribble just below the Central Lancashire Area rate at 14.9%.
- n Total employment (including self-employment) is forecast to increase to over 205,000 in the Central Lancashire Area by 2021. This represents an increase of 17.6% for the period 2001-2021. In contrast to both population and labour force growth, total employment is forecast to increase by the highest rate in Preston (22.8%) reflecting its status as the economic centre of the City Area. Total employment is expected to increase a total of 14.8% in South Ribble and 10.3% in Chorley from 2021.
- n As the labour force is expected to grow faster in both Chorley and South Ribble than the growth in jobs in the area, the model predicts a higher level of net out-commuting for both these areas. This prevents the local labour market from seriously overheating. Net out-commuting is forecast to grow to a total of some 17,000 in Chorley and 11,000 in South Ribble by 2021.
- n In contrast, net in commuting to Preston is forecast to increase steadily, to a total of some 31,000 workers by 2021. In total, net in commuting for the Central Lancashire Area is forecast to become negative from an almost balanced figure in 2001. Net out-commuting is forecast until 2013, where the relative growth in jobs results in net in-commuting once again.
- n The forecasts suggest that the Central Lancashire Area labour market will weaken from 2007-2013 and the unemployment rate will increase gradually to a peak of 5.3% in 2013 before a steady decline results in a decline in unemployment to 3.6% in 2021, a rate below the 2006 level.
- n This initial weakening in the labour market is most prominent within Chorley and Preston. A slow rate of growth in jobs is forecast to result in higher unemployment levels resulting in a peak unemployment rate of 5.1% in 2012. A continued high unemployment rate is forecast within Preston until 2015 before significant job growth results in a steep decline in unemployment.
- n In terms of commuting, the weakening of the labour market until the mid 2010's results in net out-commuting levels before the growth in jobs leads to a recovery that results in net in-commuting by 2021.
- n The number of Central Lancashire Area residents with more than one job is expected to increase very slightly to just over 10,600 by 2021 in response to a growth in the number of available jobs and a desire to maintain living standards.

7.107 Ultimately, the expectation is that the Central Lancashire Area will have a relatively stable rate of population growth and growth in unemployment. However, a lower level of employment growth relative to the regional economy from 2007 to the mid 2010's results in a weakening of the labour market, a rise in unemployment and net out-commuting. However, continued growth in employment will result in a reversal of this trend and a strengthening of the labour market to 2021. This is particularly true for Preston for which strong employment growth and relatively low population growth leads to a strong labour market performance by 2021.

Employment Land Requirement

7.108 The mechanism used to translate employment into an employment land requirement is firstly to multiply the number of employed persons, (employees in employment plus self-employed), by an assumed number of square metres per employee. The resultant number is then divided by an assumed plot development ratio in order to arrive at a total site requirement.

7.109 Whilst the ODPM's Employment Land Reviews Guidance Note provides national standards for use in this type of work, there is also recognition in the Guidance Note of the need to use local figures, where these are available. The salient figures from the Guidance Note are set out in the table below.

Table 7.17: Standard Square Metres Per Employee and Site Density by Activity

Activity	Square Metres Per Employed Person		Site Density
	Gross Internal Area	Gross External Area	Site Density ⁽¹⁾
<u>Industry</u>			
General	34.0	35.0	0.35 to 0.45
Small Business	32.0	33.0	
High tech / R & D	29.0	30.0	0.25 to 0.40
Science Park	32.0	33.0	
<u>Warehousing & Distribution</u>			
General Warehousing	50.0	50.0	0.40 to 0.60
Large Scale & High Bay	80.0	80.0	
<u>Office</u>			
General	19.0	20.5	0.41 to 2.00
Headquarters	22.0	23.0	
Serviced Business Centre	20.0	21.0	
City of London	20.0	21.0	
Business Park	16.0	17.0	
Call Centre	12.8	13.0	
<u>Retail</u>			
Town / City Centre	20.0	24.0	
Restaurants	13.0	13.0	

	Square Metres Per Employed Person	Site Density
Food Superstores	19.0	23.0
Other Superstores / Retail Warehousing	90.0	93.0

Source: Planning: Employment Land Reviews - Guidance Note, ODPM (now DCLG) Government), December 2004.

⁽¹⁾ Figures only available for some activities.

- 7.110 As mentioned above, the ODPM guidance recognises that the standards will not apply in all areas and therefore recommends that local information be used, where possible.
- 7.111 Accordingly, three different sources of employment density information were considered. The first was from the national guidelines, as issued by the ODPM, (i.e. the numbers cited in the above figure). The second was from local information derived from Valuation Office floorspace statistics for the three local authorities within the Central Lancashire Area for 2006 and the sectoral employment estimates for the Area. The third source was the findings from a telephone survey of over 300 businesses operating from premises in the Central Lancashire Area. This survey was conducted in August and September 2007 and, *inter alia*, sought information on numbers employed, floorspace occupied and the total site area.
- 7.112 The densities derived from Valuation Office floorspace statistics were calculated by taking the Valuation Office gross internal floorspace by use category, deducting the vacant floorspace and then dividing the result by the number of persons employed in the Central Lancashire Area in industries using premises within the relevant use category.
- 7.113 For example, the manufacturing floorspace per person was derived from the VO figure of 1,462,000 square metres of industrial floorspace less the 78,030 square metres of vacant industrial floorspace, giving total industrial floorspace in use of 1,383,970 square metres. Dividing this by the estimated 25,000 employees and 1,600 self-employed engaged in manufacturing in the Central Lancashire Area in 2006, gave a square metres per person figure of 47.4.
- 7.114 The survey-derived figures were generated by asking each respondent business for details of both the number of employees that were based at its premises and also the square metres of floorspace occupied. The resultant numbers were then weighted and aggregated by major activity (e.g. manufacturing, distribution) before dividing the resultant floorspace by the number of persons employed to arrive at a square metres per person figure.
- 7.115 The survey covered only those industries and sectors relevant to the study.
- 7.116 Given the nature of economic activity in the Central Lancashire Area and given the aims of this study, only the broad ODPM employment density rates are considered.
- 7.117 As such, the following table (Table 7.18) contains the employment density figures considered when calculating the building space required to accommodate the Central Lancashire Area's employment. Table 7.18 shows data for the Central Lancashire Area and Table 7.19 shows a comparison for each of the three local authorities.

**Table 7.18: Comparison of Employment Density Figures
(Square Metres Per Person)**

Activity	Central Lancashire		
	ODPM (Gross Internal) Sq m	Derived Sq m	Survey ⁽¹⁾ Sq m
Industry - General	34.0	47.4	60.5
- Small business	32.0		
Warehouse - General	50.0	44.3	65.0
- Large scale & high bay	80.0		
Construction	-	19.9	14.1
Offices - General	19.0	13.3	20.1

n ⁽¹⁾ Based on findings from a telephone survey of 300 businesses.

- 7.118 The survey figures in the above table show the average manufacturing floorspace per employee to be almost twice the ODPM standard although the derived figure is closer to the ODPM figure. For both offices and general warehousing the survey figure is slightly above the ODPM standard although both are slightly above the derived figure. Only for construction, is the employment density from the survey above the derived figure although there is no figure for comparison available from the guidelines.

**Table 7.19: Comparison of Employment Density Figures
(Square Metres Per Person)**

Activity	Chorley			Preston		South Ribble	
	ODPM (Gross Internal) Sq m	Derived Sq m	Survey ⁽¹⁾	Derived Sq m	Survey ⁽¹⁾	Derived Sq m	Survey ⁽¹⁾
Industry - General	34.0	102.1	46.3	40.7	55.9	41.8	59.2
- Small business	32.0						
Warehouse - General	50.0	57.0	64.3	39.6	62.7	45.4	69.4
- Large scale & high bay	80.0						
Construction	-	19.4	11.2	20.8	20.6	19.7	10.2
Offices - General	19.0	7.3	16.0	16.7	13.6	12.5	26.3

- 7.119 Figure 7.19 shows a comparison of the survey and derived figures to the ODPM standard by local authority. In general, the survey figures appear to be slightly above the ODPM standard and the derived figures slightly below the standard. The figure for derived manufacturing floorspace per employee for Chorley appears anomalous at over 102 square metres per employee

and suggests that there is some low density manufacturing in the area that was not covered by the survey. Since, however, there is little manufacturing employment within Chorley, this does not impact significantly on the overall figures for the Central Lancashire Area when amalgamated with those for Preston and South Ribble.

- 7.120 However, there is little manufacturing employment within Chorley and so this does not affect the overall figures substantially.
- 7.121 The detailed figures from the survey show some variance in terms of differences in the floorspace per employee in different manufacturing industries. These are illustrated in figure 7.20, below. Food & Drink is the industry with the lowest amount of floorspace per employee, with the non-metallic minerals industry the highest. These findings are not surprising, given the labour intensive nature of the former activity and the high level of automation associated with the latter.
- 7.122 Other manufacturing industries in the Central Lancashire Area with a high level of floorspace per employee are paper, printing & publishing at 63.3 square metres per employee and other manufacturing at 62.5 square metres per employee. Due to the number manufacturing companies surveyed in the sample it is not appropriate to break this down by each of the three Local Authorities.
- 7.123 The average manufacturing floorspace per person was obtained by weighting the floorspace per employee figures from the survey across seven broad manufacturing industry groups. Using total employment in each industry in the Central Lancashire Area, gives a weighted floorspace per person figure of 51.7 square metres for manufacturing.
- 7.124 Based on the survey findings, the floorspace requirement to accommodate the total the Central Lancashire Area manufacturing activity is 817,100 square metres. This figure is significantly lower than the 1,384,000 square metres shown as being occupied by the Valuation Office figures. Differences between the two may be due to the fact that the survey samples business in the area and so is not comprehensive with some key employers refusing to participate or may be due to recent changes in staffing levels in the surveyed businesses. Also, industrial activities may occur in spaces such as garages which are outside the Standard Industrial Classification for manufacturing.

Table 7.20: Central Lancashire Area Manufacturing Employment Density

Manufacturing Industry	Square Metres per Employee from Survey	Total Employment ⁽¹⁾ ('000)	Total Floorspace ⁽²⁾ ('000 sq m)
Textiles, Clothing & Leather	48.3	1.3	62.8
Paper, Printing & Publishing	63.3	2.2	139.3
Metal Fabrication	57.6	1.3	74.9
Machinery & Equipment	48.3	1.3	62.8
Electrical, Electronic & Instrument Engineering	55.5	0.7	38.9
Food & Drink	45.5	2.6	118.3
Transport Equipment	46.7	5.2	242.8
Non metallic mineral products	85.3	0.1	8.5
Other Manufacturing	62.5	1.1	68.8
Total	-	15.8	817.1
Weighted Average Floorspace	<u>51.7</u>	-	-

- (1) Weighting using employees in employment
- (2) Employees in employment plus self-employment

- 7.125 Figures for square metres per person in warehouses and in manufacturing from the survey are slightly higher than the ODPM average figures, for all three local authorities. This may be due to the type of employment located in the Central Lancashire Area. For example, if there is a low level of shift work this may explain why the local employment density figures are higher.
- 7.126 This variation in figures confirm the need to use the Central Lancashire Area specific employment density figures for warehousing and distribution rather than rely on the ODPM standard.
- 7.127 The figure for office space from the survey at 614,100 square metres, is similar to the ODPM standard for general offices of 667,800 square metres although slightly higher than the derived figure.
- 7.128 The sum of the warehouse, distribution and construction derived figures equates 978,400 square metres, this is well below the Valuation Office reported occupied warehouse and distribution floorspace of 1,293,800 square metres.
- 7.129 However, the ODPM does not include construction as a separate employment land use activity. Ignoring it and assuming that it is subsumed within warehousing and distribution, means that the ODPM based warehousing and distribution requirement is, at 1214,500 square metres, close to the amount actually available.

Current Floorspace Requirement

- 7.130 Applying the figures for square metres per employee to the 2007 employment estimate produces the following range of estimates for the amount of built space required in the Central Lancashire Area, and the three Local authorities, to house its various business activities.

Table 7.21: Central Lancashire Area Built Accommodation Requirement, (Gross Internal Floorspace), Under Different Employment Density Assumptions, 2007

Activity	ODPM (‘000 sq m)	Survey (‘000 sq m)	Derived (‘000 sq m)
Industrial	1016.2	1835.7	1497.2
Warehouse	634.2	832.6	624.0
Distribution	373.4	486.0	354.4
Construction	315.1	149.8	236.1
General Office	667.8	614.1	500.1

*Weighted by Employment Structure.

Table 7.22: Chorley Built Accommodation Requirement, (Gross Internal Floorspace), Under Different Employment Density Assumptions, 2007

Activity	ODPM (‘000 sq m)	Survey (‘000 sq m)	Derived (‘000 sq m)
Industrial	90.7	134.3	293.3
Warehouse	114.3	147.0	143.2
Distribution	35.2	45.2	44.1
Construction	62.7	23.8	45.6
General Office	190.4	170.4	78.2

*Weighted by Employment Structure.

Table 7.23: Preston Built Accommodation Requirement, (Gross Internal Floorspace), Under Different Employment Density Assumptions, 2007

Activity	ODPM (‘000 sq m)	Survey (‘000 sq m)	Derived (‘000 sq m)
Industrial	412.6	735.2	529.1
Warehouse	300.4	376.7	261.6
Distribution	214.4	268.9	186.7
Construction	107.8	75.6	84.0
General Office	367.0	280.7	344.4

*Weighted by Employment Structure.

Table 7.24: South Ribble Built Accommodation Requirement, (Gross Internal Floorspace), Under Different Employment Density Assumptions, 2007

Activity	ODPM (‘000 sq m)	Survey (‘000 sq m)	Derived (‘000 sq m)
Industrial	513.0	966.2	674.8
Warehouse	219.5	304.7	219.2
Distribution	123.8	171.9	123.6
Construction	144.7	50.4	106.6
General Office	110.5	163.0	77.6

*Weighted by Employment Structure.

- 7.131 From Tables 7.21 to 7.24, it is apparent that there is a fairly consistent pattern of current employment floorspace requirement from the derived figures and the ODPM guidelines. However, the survey figures tend to be above both the derived figures and ODPM figures apart for construction, where the survey figures are substantially lower and for offices, where the survey figures are only slightly lower.
- 7.132 As such, the survey indicates that employment densities in the Central Lancashire Area are different from the national averages represented by the ODPM guidelines and that reliance should, therefore, be placed on the

local information. This is because the local figures will reflect more accurately the land market in the Central Lancashire Area and the industries in the area.

- 7.133 One further point in relation to Table 7.15 is that the figures in the table only provide sufficient gross internal floorspace to accommodate the current level of activity. As such, there is no allowance for spare capacity linked to frictional or other elements of the market, including the need to secure a balanced portfolio of land and premises linked to providing adequate choice within the market place. Equally, there is no allowance for walls, plant rooms and outbuildings. Typically, a 5% addition is applied to convert gross internal floorspace to gross external floorspace in manufacturing and 15-20% for offices. Percentage additions to allow for market conditions can be between 15% and 40%.

Employment Land Requirement

- 7.134 Translating floorspace requirements into employment land requirements necessitates the adoption of appropriate factors to translate internal floorspace into gross external floorspace. It also requires the adoption of appropriate site development density assumptions.
- 7.135 The factors used in translating internal floorspace into gross external floorspace were a 5% increase for manufacturing, 5% for warehousing and 15-20% for offices. These figures are based on industry standards, including as presented in the 2001 Arup Economics Study for English Partnerships.
- 7.136 Two sets of site development density figures are available. These are the ones provided by ODPM and the ones available from the survey of the Central Lancashire Area businesses. The following tables compare the numbers from these two sources, shown as the amount of square metres of floorspace expected to be accommodated on one hectare of employment land.

Table 7.25: Site Density Figures: ODPM and Survey (Central Lancashire Area)

	ODPM	Survey
Industry	4,000 / ha	4,000 / ha
Warehousing	5,000 / ha	5,000 / ha
Distribution	-	5,000 / ha
Construction	-	5,000 / ha
Offices	36,000 / ha	9,000 / ha

Table 7.26: Site Density Figures: ODPM and Survey (Local Authorities)

	ODPM	Chorley	Preston	South Ribble
Industry	4,000 / ha	4,000 / ha	5,000 / ha	4,000 / ha
Warehousing	5,000 / ha	4,000 / ha	4,000 / ha	6,000 / ha
Distribution	-	4,000 / ha	4,000 / ha	6,000 / ha
Construction	-	3,000 / ha	6,000 / ha	6,000 / ha
Offices	36,000 / ha	10,000 / ha	9,000 / ha	8,000 / ha

- 7.137 From Tables 7.25 and 7.26, it is apparent that the site density of industry in the Central Lancashire Area, as revealed by the survey, is in line with the

national average apart from for offices, for which the figure is substantially lower.

7.138 The site density for offices is considerably lower in the Central Lancashire Area than that indicated by the ODPM figure. This is due to a significant proportion of Central Lancashire Area offices being located on low-density businesses parks, with few high-density office blocks present in the area that influence the national figures compared to areas such as London or Manchester.

7.139 Applying the various site density ratios to the calculated square metres required to accommodate existing economic activity in the Central Lancashire Area provides an estimate of the amount of land in existing employment use (as at 2007). This is detailed in the following Tables:

Table 7.27: Central Lancashire Area: Estimate of Land in Existing Employment Use (Hectares), 2007

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	266.8	251.1	481.9	455.1	393.0	373.3
Warehousing	133.2	144.9	174.0	188.2	131.0	142.2
Distribution	78.4	85.8	102.1	111.2	74.4	81.0
Construction	110.8	75.5	66.3	34.7	83.0	56.2
Offices	31.5	132.8	20.0	80.1	16.3	64.7

Table 7.28: Chorley: Estimate of Land in Existing Employment Use (Hectares), 2007

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	23.8	23.8	35.3	35.3	77.0	77.0
Warehousing	24.0	27.9	30.9	35.9	30.1	35.0
Distribution	7.4	8.6	9.5	11.1	9.3	10.8
Construction	22.0	26.1	22.0	10.0	16.0	19.0
Offices	2.6	9.2	5.6	20.0	2.6	9.2

Table 7.29: Preston: Estimate of Land in Existing Employment Use (Hectares), 2007

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	108.3	81.7	193.0	145.7	138.9	104.8
Warehousing	63.1	75.1	79.1	94.2	54.9	65.4
Distribution	45.0	53.6	56.5	67.2	39.2	46.7
Construction	37.9	21.3	26.6	14.9	29.5	16.6
Offices	12.7	49.7	9.2	35.8	11.2	44.0

Table 7.30: South Ribble: Estimate of Land in Existing Employment Use (Hectares), 2007

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	134.7	145.6	253.6	274.2	177.1	191.5
Warehousing	46.1	41.9	64.0	58.2	46.0	41.8
Distribution	26.0	23.6	36.1	32.8	26.0	23.6
Construction	50.9	28.1	17.7	9.8	37.5	20.7
Offices	16.2	73.9	5.3	24.2	2.5	11.5

7.140 The above figures indicate that reliance on ODPM standards would underestimate the current actual employment land requirements in the Central Lancashire Area. This is particularly true in relation to office-based activities but also for distribution and warehousing.

7.141 Equally, the inference has to be that local employment land relationships need to be used when producing forecasts of the Central Lancashire Area's future employment land requirements. This is reflected in the following figures.

Employment Floorspace and Land Forecasts

7.142 The following figure, Table 7.31, shows the current, (2007), floorspace occupied on the Central Lancashire Area by different use categories, together with the forecast floorspace requirement for selected years through to 2021. The forecasts are based on local employment densities with table 7.31 showing a composite for the entire study area based on the three local authority forecasts shown as Tables 7.32 to 7.34.

Table 7.31: Forecasted Employment Floorspace Requirements for the Central Lancashire Area ('000 square metres)

	2006	2007	2008	2009	2010	2011	2016	2021
Industrial	1,936.6	1835.7	1718.7	1656.6	1604.9	1583.6	1513.3	1441.9
Warehouse	832.2	828.4	832.6	837.2	842.1	846.3	867.0	886.4
Distribution	473.5	486.0	489.5	492.2	495.1	498.7	514.7	532.7
Construction	151.1	149.8	150.5	150.9	150.9	151.4	152.5	154.7
General Office	607.0	614.1	620.2	627.4	635.4	643.7	692.9	742.3

Source: WM Enterprise Consultants

Table 7.32: Forecasted Employment Floorspace Requirement for Chorley ('000 square metres)

	2006	2007	2008	2009	2010	2011	2016	2021
Industrial	137.9	134.3	132.1	130.2	129.1	128.0	122.0	115.2
Warehouse	147.7	147.0	147.8	148.6	149.4	150.2	153.9	157.3
Distribution	44.1	45.2	45.6	45.8	46.1	46.4	47.9	49.6
Construction	24.0	23.8	23.9	24.0	24.0	24.1	24.2	24.6
General Office	168.4	170.4	172.1	174.1	176.4	178.7	192.6	206.5

Source: WM Enterprise Consultants

Table 7.33: Forecasted Employment Floorspace Requirement for Preston ('000 square metres)

	2006	2007	2008	2009	2010	2011	2016	2021
Industrial	768.8	735.2	668.8	641.7	631.7	619.8	583.0	550.9
Warehouse	378.4	376.7	378.6	380.7	382.9	384.9	394.2	403.1
Distribution	262.0	268.9	270.8	272.3	273.9	275.9	284.8	294.7
Construction	76.2	75.6	75.9	76.2	76.2	76.4	77.0	78.1
General Office	277.7	280.7	283.5	286.7	290.4	294.1	316.4	338.6

Source: WM Enterprise Consultants

Table 7.34: Forecasted Employment Floorspace Requirement for South Ribble ('000 square metres)

	2006	2007	2008	2009	2010	2011	2016	2021
Industrial	1,029.9	966.2	917.9	884.7	844.0	835.8	808.4	775.8
Warehouse	306.1	304.7	306.2	307.9	309.7	311.3	318.9	326.0
Distribution	167.5	171.9	173.1	174.1	175.1	176.4	182.0	188.4
Construction	50.8	50.4	50.7	50.8	50.8	51.0	51.3	52.1
General Office	160.9	163.0	164.6	166.5	168.6	170.8	183.9	197.2

Source: WM Enterprise Consultants

7.143 The figures in Tables 7.31 to 7.34 are in accordance with the normal convention used by property agents and developers in reporting floorspace. As such, they represent gross internal areas for industrial and warehouse premises and the net internal area for offices. This means that the

floorspace figures are not directly comparable between different uses and need to be variously adjusted in order to raise them to a common gross external area basis for use in calculating land requirements.

7.144 Also, in using the floorspace figures in Tables 7.31 to 7.34, it is important to recognise that these do not include any allowance for vacant premises and do not allow for the provision of a balanced portfolio providing choice. As such, they are the absolute minimum needed merely to accommodate current and forecast activity.

7.145 The following figure (Table 7.35), sets out the anticipated employment land requirement for the Central Lancashire Area to 2021 based on current employment densities and land development densities in the Area. In producing these figures, the manufacturing warehouse and distribution gross internal floorspace shown in Tables 7.18 and 7.19 has been increased by 5% and the office floorspace by 17.5% in order to raise them to gross external area, before applying appropriate employment densities.

Table 7.35: Forecasted Employment Land Requirements for the Central Lancashire Area (Hectares)

	2006	2007	2008	2009	2010	2011	2016	2021
	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)
Industrial	480.8	455.1	427.6	412.4	398.6	393.6	376.9	359.5
Warehouse -	189.1	188.2	189.2	190.2	191.4	192.3	197.0	201.4
Distribution	108.2	111.1	111.9	112.5	113.2	114.0	117.6	121.8
Construction	34.9	34.6	34.8	34.9	34.9	35.0	35.2	35.8
General Office	79.2	80.1	80.9	81.8	82.9	84.0	90.4	96.8

Source: WM Enterprise Consultants

Table 7.36: Forecasted Employment Land Requirements for Chorley (Hectares)

	2006	2007	2008	2009	2010	2011	2016	2021
	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)
Industrial	36.2	35.3	34.7	34.2	33.9	33.6	32.0	30.2
Warehouse -	36.1	35.9	36.1	36.3	36.5	36.7	37.6	38.4
Distribution	10.8	11.0	11.1	11.2	11.3	11.3	11.7	12.1
Construction	10.0	9.9	10.0	10.0	10.0	10.0	10.1	10.2
General Office	19.8	20.0	20.2	20.5	20.7	21.0	22.6	24.3

Source: WM Enterprise Consultants

Table 7.37: Forecasted Employment Land Requirements for Preston (Hectares)

	2006	2007	2008	2009	2010	2011	2016	2021
	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)
Industrial	152.3	145.7	132.5	127.1	125.2	122.8	115.5	109.1
Warehouse -	94.6	94.2	94.6	95.2	95.7	96.2	98.6	100.8
Distribution	65.5	67.2	67.7	68.1	68.5	69.0	71.2	73.7
Construction	15.0	14.9	15.0	15.0	15.0	15.1	15.2	15.4
General Office	35.5	35.8	36.2	36.6	37.1	37.6	40.4	43.3

Source: WM Enterprise Consultants

Table 7.38: Forecasted Employment Land Requirements for South Ribble (Hectares)

	2006	2007	2008	2009	2010	2011	2016	2021
	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)
Industrial	292.3	274.2	260.5	251.1	239.5	237.2	229.4	220.2
Warehouse -	58.4	58.2	58.5	58.8	59.1	59.4	60.9	62.2
Distribution	32.0	32.8	33.1	33.2	33.4	33.7	34.8	36.0
Construction	9.8	9.8	9.9	9.9	9.9	9.9	10.0	10.1
General Office	23.9	24.2	24.5	24.8	25.1	25.4	27.4	29.3

Source: WM Enterprise Consultants

- 7.146 As with the figures in the preceding tables, the figures in Table 7.35 to 7.38 represent the absolute minimum needed to accommodate existing and future activities, with no allowance for vacancies or the need for a balanced land portfolio.
- 7.147 From the above, there is expected to be an increasing land requirement for offices, warehouses and other distribution space. However, there is a continued decline in the requirement for manufacturing land. The land requirement figure for Construction remains fairly stable.
- 7.148 The total requirements reflect the size of each of the three authorities that make up the Central Lancashire Area and their industrial structure. Although the total land requirement for the Central Lancashire Area declines slightly, the requirement for Chorley actually rises, due to the lack of incumbent manufacturing industry at the present time. The decline for land requirement is most significant within South Ribble, due to its reliance on manufacturing compared to the rest of the Central Lancashire Area.
- 7.149 Ultimately, appropriate additions need to be made to the above figures in order to ensure that a balanced portfolio of sites is available to meet the

needs of indigenous businesses and of those either planning to start-up in business in the Area or to re-locate into it.

Scenarios

- 7.150 The above forecasts and associated employment land use requirements are based on current best estimates of the way in which the international, national and regional economies will develop over the longer term. They are also based on best estimates of the likely growth in population in the Central Lancashire Area and its associated structure
- 7.151 Inevitably, there are a number of factors that could impact on the actual outcomes over the forecast period, some of which could have implications for the amount of employment land required. These are explored further below.

Economic Growth Rates

- 7.152 Underpinning the forecasts is an assumption that the UK economy will grow at an average rate of 2.6% per annum through to 2014 and thereafter at a rate of 2.7% per annum. These growth rates represent underlying trends, with an expectation that there will be year on year deviations. It is only if there is a sustained deviation that there will be any long-term impact on employment land requirements, both nationally, regionally and in the Central Lancashire Area.
- 7.153 A sustained deviation is considered unlikely, with UK GVA growth rates traditionally adhering to a consistent long-term trend. As such, the forecasts are considered robust over the longer-term.
- 7.154 Should there be, however, a sustained deviation, the cause of that sustained deviation will determine the sectors most likely to be affected. Irrespective, it cannot be assumed that 10% higher or lower growth will mean a 10% increase or decrease in the amount of employment land required. This is particularly so if the higher or lower growth is the result of changes in consumer expenditure, with changes in consumer expenditure primarily impacting directly on the retail and service sectors and not on manufacturing. Also, with many consumer goods now sourced from abroad, the indirect impact on manufacturing is likely to be small. Supporting this is the fact that many British manufactured goods are exported.
- 7.155 This does not mean that a recession that impacts particularly on manufacturing is impossible. History shows that the 1979-81 recession was manufacturing led and impacted mainly on those areas that had a high dependency on manufacturing. In contrast, the 1990-92 recession was consumer led and left manufacturing relatively unscathed.
- 7.156 A sustained manufacturing led recession seems unlikely. Should such a recession occur, then a reduction in manufacturing employment land proportionate to the associated decline in manufacturing employment would be expected to occur.
- 7.157 At present, the most likely type of a recession is a consumer led recession. This reflects the fact that consumer debt, expressed as a percentage of household income, is, at 154%, at its highest level ever. Such a recession will impact most on the retail and service sectors and not on manufacturing. It will, however, impact on the housing market and thereby on the construction sector. It will also impact on the distribution sector as less goods are purchased by consumers.

7.158 Even in a period of recession, basic consumer needs will continue to be met, with many of these needs likely to be met from lower value goods. For example, luxury foods will be replaced by more basic foods. In addition, decisions to replace white goods (e.g. kitchen equipment such as fridges) and brown goods (e.g. televisions) will be delayed rather than cancelled altogether. Best estimate is that a sustained 10% decline in consumer expenditure will, at most, reduce employment land requirements by 2.5%.

7.159 In conclusion, any sustained slow down in economic growth rates is likely to be consumer related and have only limited impact on employment land requirements. Higher than forecast growth rates could, depending on their cause, impact disproportionately on employment land requirements. Even then, the overall impact is expected to be limited, particularly as the economy has limited capacity to grow at a rate above its long-term growth trend.

Population Levels

7.160 The workings of the forecasting model are such that an increase or decrease in the population does not *per se* directly influence the employment land requirement. This is because employment land is primarily concerned with satisfying business-to-business relationships rather than with satisfying household demand.

7.161 A change in population levels will directly impact on household demand but this will be largely reflected in the activities of sectors such as retail, personal services, education and health, all of which fall outside of the scope of the employment land study.

Working Population Levels

7.162 Changes in working population levels, be they as a result of changes in the overall population or as a result of changes in activity rates, also have little direct impact on the demand for employment land. This is because the demand for employment land is driven by wider economic considerations rather than by the supply of labour. This is true of both the real economy and of the forecasting model.

7.163 As such, an increase in the working population not matched by an increase in overall activity within the economy will result either in a higher level of out-commuting as individuals seek jobs elsewhere, or will result in an increase in unemployment or both. The converse is also true, with a decline in the working population not matched by a decline in economic activity leading to increased in-commuting and reduced unemployment. It may also lead to a higher incidence of double jobs.

Public Policy

7.164 Should the population of the Central Lancashire Area grow at a faster rate than projected and should it be public policy to provide sufficient employment land to accommodate the employment needs of that population, then a greater amount of employment land will be needed than the central forecast assumes.

7.165 In calculating the amount of extra employment land needed, assumptions need to be made about the structure of the increased population. If it is assumed that the increased population has the same age and gender structure as the forecast population and if it is assumed that it has the same activity rate profile, then each 10,000 additional people will generate a

requirement for around 22.5 hectares of additional employment land. Further detail is contained in the following table, **Table 7.39**.

Table 7.39: Forecast Additional Employment Land Requirements to Meet Employment Needs of an Additional 10,000 Population in Each Area (Hectares)

	Central Lancashire*	Chorley	Preston	South Ribble
Industrial	10.0	2.7	8.1	20.0
Warehouse	5.5	3.4	7.5	5.5
Distribution	3.3	1.0	5.5	3.2
Construction	1.0	1.0	1.0	1.0
General Office	2.7	2.1	3.5	2.7
Total:	22.5	10.2	25.6	32.4

Source: WM Enterprise Consultants

*Assumes 10,000 population increase distributed across the area in line with forecast population split.

Labour Productivity Change

- 7.166 One of the features of the British economy and, in particular, manufacturing has been a growth in labour productivity. This has been driven by a global economic change that has seen lower value added activities move to the economies of Central and Eastern Europe and Asia. The result has been a concentration of higher value added activities in Britain, including the Central Lancashire Area.
- 7.167 This trend is expected to continue into the foreseeable future.
- 7.168 The employment land forecasts assume that labour productivity growth will not impact on the overall employment land requirement and that average employment densities will remain unchanged over the forecast period.
- 7.169 Should, however, employment densities fall due to labour productivity growth within manufacturing, then a greater amount of manufacturing employment land will be required than the forecasts assume.
- 7.170 The forecasts suggest that, despite a decline in manufacturing employment, manufacturing GVA in the Central Lancashire Area will grow by 17.5% between 2006 and 2021. The growth will not, however, be spread uniformly across the area, with the strongest growth expected in Preston, (22.9%), followed by South Ribble, (14.0%), and then Chorley, (8.6%). The differences in the forecast growth rates are largely determined by the mix of industries in each area.
- 7.171 It would be misleading to suggest that a forecast increase in manufacturing GVA will lead to a proportional increased requirement for employment land for manufacturing. Rather, the increase in manufacturing GVA suggests that the reduction in employment land for manufacturing may not be as great as is suggested by employment forecasts alone. Placing a precise figure on the adjustment is not, however, easy. Nevertheless, the maximum adjustment factors would be 25% in Chorley and South Ribble and 40% in Preston. The effects of these adjustments are shown in the following table, **Table 7.40**:

Table 7.40: Manufacturing Employment Land Requirement Taking Account of GVA Change (Hectares)

	2021 Base	2021 GVA Adjusted
Chorley	30.2	34.7
Preston	109.1	129.2
South Ribble	220.2	245.5
Central Lancashire Area	359.5	409.4

Source: WM Enterprise Consultants

7.172 The areas in the second column of the above figure should be viewed as absolute maxima. Even so and as with all of the forecast figures, there is still a need to add on an amount to allow for choice and for friction within the market.

Other Assumptions

7.173 In line with best practice, the forecasts make use of local information in so far as it is available. Making use of other information, such as that published in the ODPM Guidance, inevitably provides different results.

7.174 The following table shows the employment land requirements for each of the areas based on the ODPM Guidance figures and contrasts these with the forecasts based on the more local information that underpins the main forecasts.

Table 7.41: Employment Land Requirements in 2021 Based on Different Employment Density Estimates (Hectares)

	Central Lancashire		Chorley		Preston		South Ribble	
	ODPM	Local	ODPM	Local	ODPM	Local	ODPM	Local
Industrial	209.6	359.5	20.4	30.2	81.1	109.1	108.1	220.2
Warehouse	142.5	201.4	25.7	38.4	67.5	100.8	49.3	62.2
Distribution	86.0	121.8	8.1	12.1	49.4	73.7	28.5	36.0
Construction	114.4	35.8	22.8	10.2	39.1	15.4	52.5	10.1
General Office	24.6	96.8	2.2	24.3	9.4	43.3	13.0	29.3
Total	577.1	815.3	79.2	115.2	246.5	342.3	251.4	357.8

Source: WM Enterprise Consultants

7.175 From the above, it is evident that a movement away from current local employment densities and site densities would reduce the overall employment land requirement in 2021 by around 30%.

7.176 The reduction would be particularly significant in relation to general office space but with any such reduction predicated on a move to high-rise office blocks substantially occupying the whole of each plot.

Conclusion

7.177 Factors that would have the greatest impact on the required amount of employment land in the Central Lancashire Area would be a move towards higher employment and site densities and a public policy decision to provide additional employment land to meet the needs of a higher than forecast economically active population.

8. Findings From Employer Survey

Introduction

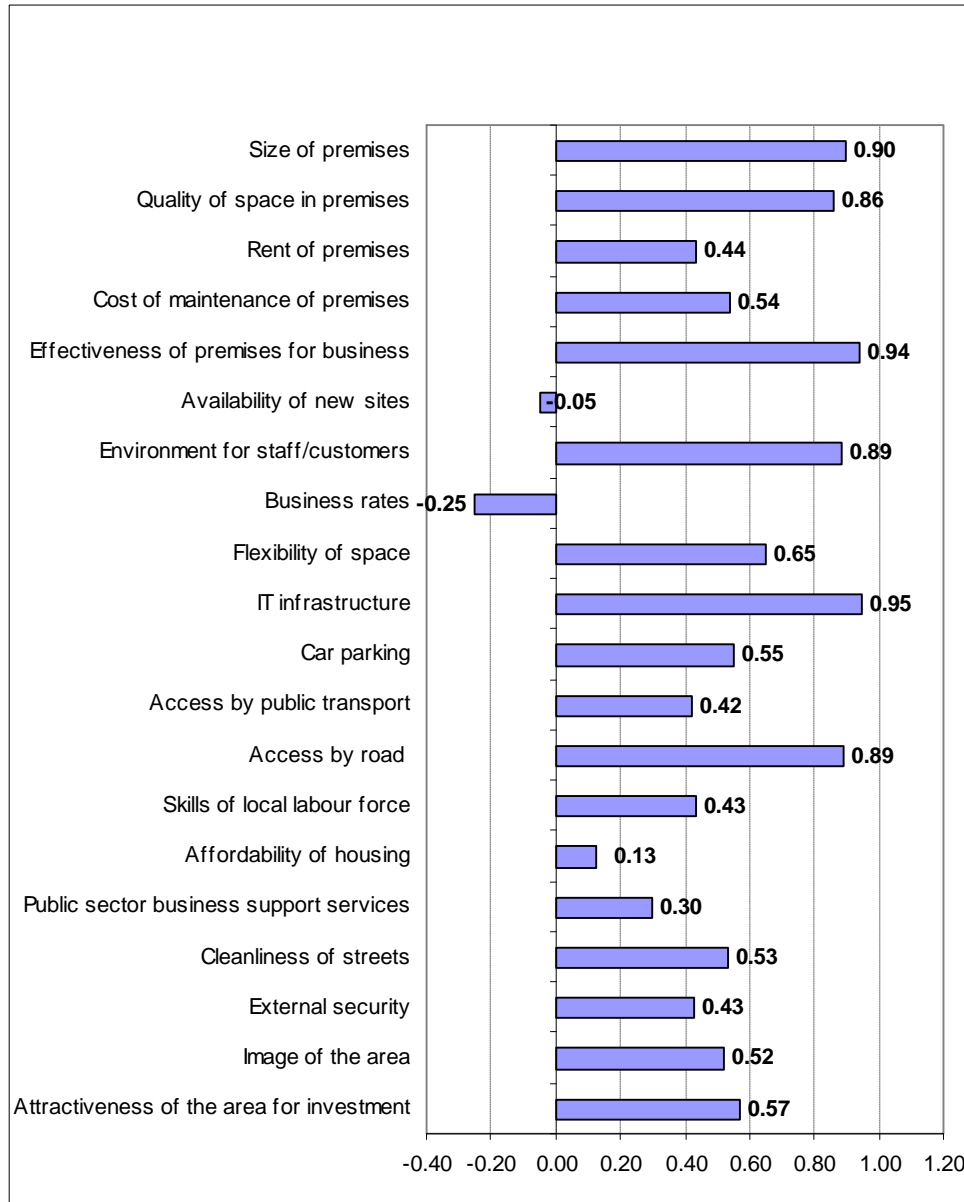
- 8.1 The following details the findings from a survey of 321 businesses operating in the Central Lancashire Region. Of these:
- n 109 were undertaken in the Borough of Chorley;
 - n 101 in the Borough of South Ribble; and
 - n 111 within the boundaries of Preston City Council.
- 8.2 The businesses operated in the manufacturing, construction, wholesale and distribution and business and financial services sectors.
- 8.3 The survey was conducted by telephone, with respondent businesses asked to complete a proforma questionnaire focusing on their current and future employment land requirements within the three council areas. Other questions sought to gain an insight into the dynamics of the local business sector and an understanding of perceptions of each borough as a place in which to operate businesses. In addition, the opportunity was used to gain an insight into perceptions of employment land premises availability within the area as a whole and within different parts of it.
- 8.4 The survey took place in August and September 2007, with those selected for interview drawn from a stratified database of eligible businesses. Those selected for interview were chosen so as to give as representative a sample as possible across and within sectors, but with due consideration being given to ensuring coverage of all relevant geographical parts of the Borough.
- 8.5 WM Enterprise would like to use this opportunity to thank all those businesses that participated in the survey and thereby enabled data from 321 respondents to be analysed, against an original target of 300.

Overview

- 8.6 Companies who responded to the survey had a total of 10,875 employees or 6% of the total workforce in the area. As indicated above, not all sectors were included in the survey (in line with the requirements of the study brief). Taking this into account lifts the percentage coverage of the workforce within eligible sectors to just over 12%.
- 8.7 Approximately 20% of the employees of the companies surveyed did not, based on the perceptions of their employers, live within the Central Lancashire boundaries. A limited amount of commuting between Chorley, Preston and South Ribble could be seen with 31% of employees who work within Chorley coming from the borough, compared to 25% within Preston and 28% within South Ribble.
- 8.8 Using a weighting of +2 for very good, +1 for good, -1 for poor and -2 for very poor, it is possible to capture how highly businesses rate various aspects of their current premises and locality. As the figures include people who were neutral, anything over +1 shows that a particular aspect is rated highly enough to cut through respondent apathy.

8.9 The length of each bar indicates the relative strength of opinion.

Figure 8. 1: Positive and Negative Aspects of Operating in Central Lancashire Area

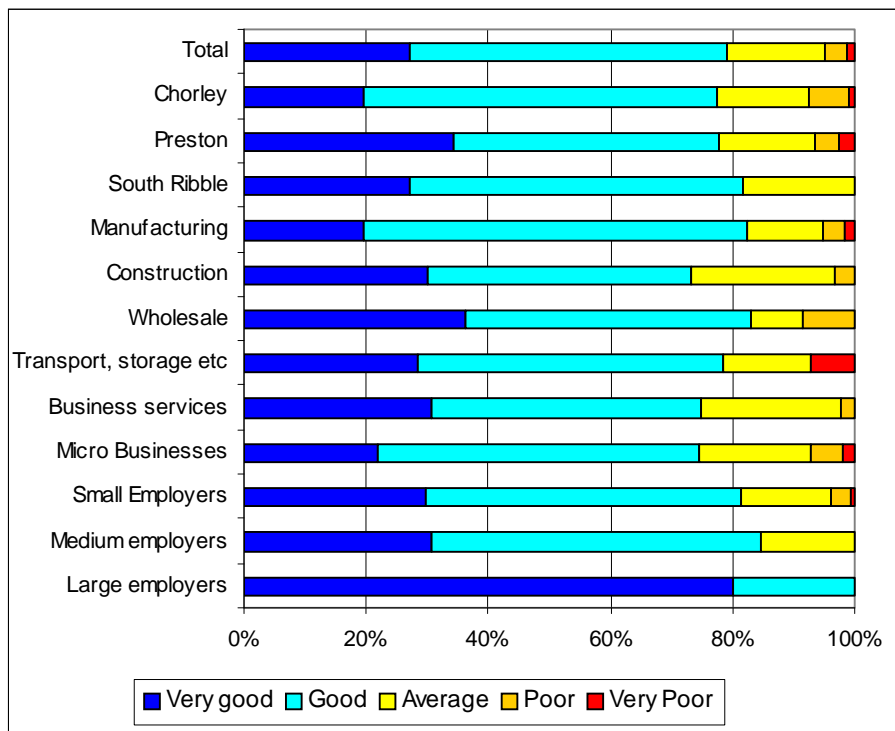


Source: WM Enterprise Consultants

8.10 As can be seen from the figure, the overall view of businesses operating in the Central Lancashire area is positive. The major concern is business rates. Cheaper rates were the most common response when interviewees were asked how the Council could help businesses in the area. Unfortunately, the setting of business rates is also outside of the control of the local authority and indicates a lack of awareness amongst businesses. This is however, quite similar to findings in other areas.

- 8.11 Availability of sites and affordability of housing in the area received a negative and low score respectively, indicating that land was an issue regardless of usage.
- 8.12 77% of respondents rated Central Lancashire as either a good or a very good place in which to do business. One in six felt it was only average but less than 5% thought it was poor.
- 8.13 These findings place the area marginally ahead of other areas where WM Enterprise Consultants has recently undertaken business surveys and employment land reviews. In these instances 60% of respondents, on average, rated their respective areas as very good or good places in which to do business and 12% rated them as poor or very poor.
- 8.14 From Figure 8.2 below, it is evident that the area is viewed particularly as a good location due to its centrality and access to roads. Where businesses tended to rate the area as poor was often in terms of access issues. Business services also show a relatively high scoring particularly amongst ICT related firms, which is unsurprising due to the comparably high score for IT infrastructure. The area is perceived as particularly good by large employers.

Figure 8.2: Percentage of Surveyed Businesses Rating Central Lancashire as a Very Good or Good Business Location, By Business Attribute



Source: WM Enterprise Consultants

8.15 Table 8.1 shows the geographical and sectoral distribution of surveyed activity within the area.

Table 8.1: Distribution of Surveyed Activity Within Central Lancashire City Area

	m ² per person	Site Density	Approximate proportions of floorspace					
			Office	Retail	Warehousing	R&D	Industrial	Other
Chorley	42.38	0.44	24%	1%	42%	0%	29%	4%
Preston	51.75	0.49	23%	4%	44%	1%	27%	0%
South Ribble (1)	57.46	0.43	20%	0%	26%	7%	47%	0%
Overall	50.53	0.45	22%	2%	37%	3%	35%	1%

Source: WM Enterprise Consultants

(1) One external outlier removed from sample

8.16 Figures indicate the mix of organisations between the three areas. Chorley has a higher proportion of office space from the companies surveyed although the number of business services companies contacted was comparatively similar.

8.17 One large organisation was excluded from this comparison as its land usage was unique and would have skewed the results, almost doubling the m² per person.

8.18 Analysis of the short-term premises needs of the surveyed business in each area, suggests that increases in office space will be higher in Preston (11%) than Chorley (6%) or South Ribble (6%). Retail space, as part of a wider mixed development, is expected to see a slight increase of 2% in Preston but this is from a low base and no specific retail units are planned by the surveyed companies. Warehousing space is expected to increase by 2-3% in all three areas. There is expected to be a higher increase in industrial space in Preston (18%) and Chorley (14%) than in South Ribble (4%). The increase in Preston may be considered on the high side due to the requirements of the increase indicated by one of the major employers.

8.19 For companies with over 50 people, market pressure was the main problem with 26% interviewees mentioning this, compared to 22% mentioning existing site constraints. The rising cost of doing business (9%) and traffic issues were the next most prominent problems.

8.20 The following provides a more detailed analysis of the survey findings by sectoral activity.

Manufacturing

Survey Sample

8.21 A total of 120 manufacturing companies, with a total of 5,632 employees, were interviewed as part of the survey. 39 were in Chorley, employing 1,208 people, 35 were in Preston, employing 1,343 people and 46 were in South Ribble employing 3,081 people.

8.22 78% of organisations were independent companies, 5% were head office sites and the remainder were branches or subsidiaries of larger organisations.

8.23 The main industries that were interviewed were fabricated metal manufacturing (16% of respondents), paper manufacturing and publishing ((12%) and textiles (11%). In Chorley fabricated metal (23%) and textiles (15%) were the most frequently mentioned, with paper manufacture (19%),

wood manufacture (14%) and textiles (11%) being prominent in Preston. In South Ribble, metal manufacturing (16%) and other non-metal manufacturing (16%) were the main industries.

Workforce

- 8.24 In total, 95% of the employees of the respondent businesses were employed full-time and 5% were employed part-time, this did not vary greatly according to location from 97% full time in Preston to 94% full time in Chorley. The maximum number of employees on site across all the businesses, at any one time, was 94% of the total number employed. This suggests that there is relatively little large-scale shift work within the area's manufacturing sector.
- 8.25 Around 86% of the manufacturing workforce was drawn from within the Central Lancashire area and 14% from further afield. 21% came from within a mile of the manufacturing site. This suggests that employees working on manufacturing sites are amongst those least likely to commute long distances. Those in the Preston area were most likely to live and work within the Preston City Council area with 29% living and working within a mile of the work site and 52% living within Preston. In contrast Chorley had 33% commuting into the Borough and South Ribble had 29%.

Site Characteristics

- 8.26 43% of the surveyed businesses held the freehold of their sites, with a further 45% occupying their sites under a lease. 7% occupied their premises under a licence agreement, with the balance having other arrangements, mainly involving a combination of freeholds and leaseholds. Leasehold was highest in South Ribble, which fits in with the overall figures from the area. In Preston City area 44% of manufacturers had freehold sites and 39% had leasehold, compared to 36% freehold and 42% leasehold for all businesses within the City Council's boundaries. This may, however indicate the maturity of the manufacturing industry compared to other types of business.
- 8.27 28% of the manufacturing businesses described their premises as budget, with a further 65% describing them as mid range. Only 8% considered their premises to be prestigious.
- 8.28 54% of the businesses had been trading within their respective council areas for more than 10 years and a further 17% for between 6 and 10 years. Only 10% had been trading in the area for less than two years and just 3% for less than a year compared to 7% who had been trading for 1 to 2 years.
- 8.29 Three out of the four of those trading in the Central Lancashire area for less than one year had recently relocated from an address within the Chorley, South Ribble or Preston area, which was in all cases a residential address. The other case purchased a business at this location. Those that had only been in the area for between one and two years were predominantly start ups with one in three relocating, in all instances from outside the area.
- 8.30 Overall, 43% of the surveyed manufacturers had always been at their present site in Central Lancashire area and a further 46% had relocated within the area. Just 11% had relocated into the Central Lancashire area. In most cases they had relocated from one council area to another.
- 8.31 56% of South Ribble and 46% of Chorley manufacturers have always been in this location in contrast to 31% from Preston. 50% of manufacturers in Preston had relocated within the City Council boundary compared to 36%

- in Chorley and 24% in South Ribble. The majority of those relocating within the Central Lancashire area had done so at least three years ago, with 50% moving into the area having done over 10 years ago. These figures indicate a relatively stable manufacturing sector.
- 8.32 Those that had relocated to their current address from within the three council areas had mainly moved because of a need for larger premises, although access to the motorway was also an important factor.
- 8.33 For those moving into the area, the main incentive was the access to the motorway and proximity to supply base.
- 8.34 Where companies had looked at other locations, those locations had typically been very close to where they were currently located. For those looking outside the boundaries of their local council, they tended to look at the similar areas in neighbouring boroughs. Outside the Central Lancashire area, Blackburn was most frequently mentioned as a potential location although Bolton and Wigan were also mentioned.
- 8.35 18% of companies that had relocated had not considered any other sites. This is about half that of other areas where this question has been asked and may indicate the difficulty in finding a suitable site.
- 8.36 The main reasons given for companies being located in the area are ease of access and the cost and size of premises. 27% of respondents mentioned ease of access to the motorway as being of importance, with just 1% also indicating rail and / or airport access. The size of premises (28%) was much more important than cost of premises (12%). Cost and quality of premises were less important for larger companies where access to the motorway was one of the key requirements.
- 8.37 Ease of access to the motorway network was most frequently cited by manufacturing businesses located in South Ribble and least frequently in Chorley. Manufacturers in Chorley were slightly more likely to mention size of premises as an issue compared to those in South Ribble.
- 8.38 Just fewer than 1 in 5 companies that had been based in the Central Lancashire region stated that the main reason for being located there was for historical reasons rather than any other factor that they were aware of. This was marginally higher in Chorley (19%) than Preston (16%) or South Ribble (15%).
- 8.39 87% of those businesses surveyed considered their current premises to be suited to their needs, which was a similar proportion to all businesses. Those who occupied their premises on a lease were slightly more likely to be dissatisfied with the suitability of their current premises (15%) compared to those who had a freehold tenure (10%) and those who were tenants under licence (0%). Premises not suited to current needs were split 36% prestigious, 6% mid range and 18% budget.
- 8.40 Between them, the manufacturers whose premises did not suit them occupied approximately 9% of the total manufacturing floorspace surveyed. 8 out of the 18 felt the premises was too small, 2 felt that the buildings were now too large for them, 2 felt that a one storey building would be better and for 2 manufacturers the quality of the building was low. The need for major repairs, frequent flooding, poor site access and age of the building were also issues as was the lack of telephone lines into the business.
- 8.41 Market pressure was the main difficulty being experienced by manufacturers (21% cited this as the main problem and 28% cited it overall) and this was more of a problem for this sector than for the other

sectors surveyed, (generally less than 10%). Lack of suitable premises was mentioned by 3% of manufacturers, the cost of land by 3% and site constraints by 13% suggesting that there may be a lack of suitable land available. 2% also indicated that planning constraints was a problem but this was not specific to one of the councils in the area.

- 8.42 Site density indicators were broadly similar within the three council areas as can be seen in the table below.

Table 8.2: Site Density indicators for Manufacturing Premises

	m ² per person		
	Total employment	Maximum Number on site at any one time	Site Density
Chorley	51.45	53.67	0.40
Preston	62.16	68.04	0.53
South Ribble (1)	65.79	71.07	0.37

Source: WM Enterprise Consultants

(1) One external outlier removed from sample

- 8.43 The major difference in site densities seem to be based on the type of industrial premises (i.e. whether there was warehousing on site) and the manufacturing sector rather than the council area in which they were located.

- 8.44 Over half of the space within the manufacturing premises was, predictably, given over to manufacturing activities, with the balance largely shared between offices and warehousing. This is shown in the table below.

Table 8.3: Percentage of Floorspace in Manufacturing Businesses Used for Stated Activity

Activity	% of Floorspace in Manufacturing			
	Total	Chorley	Preston	South Ribble
Manufacturing	61.1	61.1	55.3	62.1
Office	24.4	17.2	15.9	26.6
Warehousing	12.7	21.5	25.9	9.4
Research & Development	1.8	0.9	2.8	1.9
Retail	0.0	0.2	0.1	0.0
Other/Sublet	0.0	0.0	0.0	0.0

Source: WM Enterprise Consultants

- 8.45 The absence of space devoted to retailing reflects the nature of manufacturing in the area, with few consumer goods being produced.

- 8.46 Relatively little space was devoted to R & D, with only 10% of the surveyed manufacturing businesses having a specific R & D area. This does not mean, however, that none of the other businesses was undertaking R & D. Rather, to the extent that R & D was being conducted, it was being undertaken in areas not exclusively given over to R & D.

Growth Plans

- 8.47 50% of the manufacturing businesses surveyed were expecting to see their businesses grow in the short-term, with 4% expecting to see a decline. The balance, (45%), were expecting their businesses to remain static. In terms of employment, 47% expected to increase staff in the short-term and 4% expected employment numbers to decrease.

- 8.48 82% of those expecting growth, anticipated an associated increase in employment, with 18% expecting employment levels to stay the same. 4% of businesses expected to see a decline in employment numbers. The majority of companies where turnover was expected to remain the same, also expected employee numbers to remain the same, although one expected a decrease in employment numbers. Employment decline was only anticipated where turnover was also expected to decline.
- 8.49 21% of the surveyed manufacturers expected to expand their premises in the short-term, with the most significant expansions already at the planning stage. However, 50% of those who expected to see turnover growth (50%), did not expect this to lead to an increased premises requirement and 7% expected a decrease in the size of premises required.
- 8.50 Floorspace is expected to increase by 17% in Chorley, 4% in Preston and 13% in South Ribble in the short term. Just under half of this additional floorspace was, however, expected to come from one development.
- 8.51 Although timescales are highly dependent on a variety of factors including planning applications and investment constraints, the following changes to manufacturing floorspace is expected in the next 5 years:

Table 8.4: Predicted change in Manufacturing floorspace over the next five years

	Sublet	Office	Retail	Warehousing	R&D	Industrial
Within a year	920	- 750	-	- 1,255	420	10,421
Within 2 years	-	1,399	-	1,240	-	5,274
Within 3 to 4 years	-	19,578	130	6,000	-	39,273
Around 5 years	-	119	-	10	-	2,052
Do not know	-	- 442	-	210	-	- 4,428
Total	920	19,903	130	6,205	420	52,591

Source: WM Enterprise Consultants

- 8.52 One or two organisations were uncertain when they intend to make the change. These tend to be organisations where one person means to retire or manufacturers who are aware that the space they currently have is not ideal i.e. too large or too old but have not yet looked at the possible options.
- 8.53 The following figure shows the anticipated future use of premises occupied by manufacturing business within the three councils.

Table 8.5: Percentage of Floorspace in Manufacturing Businesses Expected to be Used for Stated Activity in 5 Years Time

Activity	% of Floorspace in Manufacturing			
	Total	Chorley	Preston	South Ribble
Manufacturing	61.6	61.8	60.1	61.8
Office	24.4	17.3	13.2	27.0
Warehousing	12.1	20.7	22.2	9.5
Research & Development	1.7	0.0	3.2	1.7
Retail	0.0	0.2	0.2	0.1
Other/Sublet	0.1	1.1	0.0	0.0

Source: WM Enterprise Consultants

- 8.54 Around 60% of the surveyed manufacturing businesses with quantified expansion plans were unable to accommodate those plans within their existing buildings. Reasons cited included a lack of room for expansion, leasehold constraints and restrictions on parking.
- 8.55 39% were able to accommodate their expansion plans as they typically had low site densities or were planning a wholesale site redevelopment, although one company did not need to make any changes to the premises to accommodate their increase, as the neighbouring building was currently vacant.
- 8.56 The largest developments are expected to rebuild or add further buildings on a current site, with most manufacturers surveyed, being negative about other possible sites or did not know as they had not yet started looking. Smaller companies were also expecting to be able to expand on their current site through building modifications
- 8.57 Leyland and Preston District were believed to be the most suitable areas but, in each case, only one or two companies felt that this was the case and were already located in the area. The majority of those who were looking to relocate were negative about site availability or did not know.
- 8.58 Lack of industrial sites was the main issue precluding an area and in some cases such as in and around Chorley where industrial sites were considered to be available, cost was a deterring factor.
- 8.59 83% of companies were looking to remain in the locality for their current or for all of their activities. 4% did not know and of the 13% some were already quite well advanced in their plans to leave the area.
- 8.60 3% of the surveyed manufacturing companies expected to see their turnover decline over the longer-term, as against 69% that were anticipating turnover growth. The remaining 28% expected turnover to remain unchanged.
- 8.61 Although 73% of all the manufacturers expected to see turnover growth, only 48% expect to see an associated increase in staff. Shop floor and process operatives were most likely to be in demand, followed by management and skilled manual workers.
- 8.62 Although this can only be a rough indication and a lot can happen over the timescale suggested, the expectation is for a net additional 3% of manufacturing floorspace to be required through to 2016. However this varies considerably between areas with increases in Chorley close to 15% compared to 2% and 3% currently located in Preston and South Ribble.
- 8.63 4 out of the 14 manufacturers looking to increase their floorspace expected to relocate, as there were doubts that the type of premises required could be obtained at a reasonable cost within the area. This would bring the increase in the area down to 6% from 8.6% if these organisations relocated.

Warehousing

Survey Sample

- 8.64 48 companies engaged in warehouse activities and employing a total of 1,327 people were interviewed as part of the survey. 15 wholesalers were interviewed in Chorley, employing a total of 143 people, 22 in Preston employing 879 people and 11 in South Ribble employing 305 people.

8.65 77% of these were independent companies, 6% were head office sites with the remainder being branches or subsidiaries. 57% of companies only employed full-time staff, with only a relatively low 27% of the total workforce living local to where they were employed. The maximum number of staff on site at any one time was 80% of the total employed. This implies a relatively high level of shift work as well as an element of delivery work.

Workforce

8.66 Employment within the wholesale businesses is predominately full-time, with 89% of employment full-time and 12% part-time.

8.67 The average floorspace per person in this sector was 73m², just under to the 80m² ODPM guide for large scale and high bay warehouses. When the maximum number of people on site was taken into account, the figure rose to 91m². In Chorley, floorspace per person seemed to be high at 93m² per person, but when the maximum number of people on site was factored in, the figure was 94 m², closer to the average for the three areas.

Site Characteristics

8.68 44% of the surveyed wholesale businesses owned the freehold of their premises, with a further 50% occupying their premises under a lease. The remainder occupied their premises under a license. The freehold premises tended to be the larger premises having, on average, 2,500 square metres of space as against 762 square metres of space for the leasehold sites and 1,200 square metres for premises held under a licence.

8.69 Whilst the majority of the wholesale businesses surveyed had a building footprint that covered the whole of the site, the larger facilities have a significantly lower building to site ratio. These have the effect of reducing the overall development density to 0.45, which is slightly lower than the ODPM's 0.5 guide.

8.70 This picture can be seen in the case of the three council areas. In Chorley (0.53) and South Ribble (0.57) the density was slightly above the 0.5 ODPM guideline for site density, but in Preston the figure was significantly lower due to the higher proportion of larger companies there.

Table 8. 6: Site Density indicators for Wholesale Premises by Council Area

	Total employment	Maximum Number on site at any one time	Site Density
Chorley	92.7	94.0	0.53
Preston	68.1	94.2	0.40
South Ribble	78.0	82.9	0.45

Source: WM Enterprise Consultants

8.71 The number of square metres per employee also varies considerably, ranging from around 4, (where there was a small office and open storage/parking), to significantly over 100. Site density also varied massively from 0.05 to almost 1.0.

8.72 Typically, 71% of the available floorspace is given over to warehousing, with the 17% used to house office functions. There was also a small amount of retail and workshop space of modifications overall, although in some premises this was a high proportion of the premises. The overall split is shown in Table 7 below.

Table 8.7: Percentage of Floorspace In Surveyed Wholesale Businesses Used for Stated Activity

Activity	% of Floorspace in Wholesalers			
	Total	Chorley	Preston	South Ribble
Manufacturing	3.3	0.0	0.0	12.6
Office	17.4	10.8	20.9	12.2
Warehousing	70.9	84.2	66.4	74.9
Research & Development	0.0	0.1	0.0	0.0
Retail	8.5	4.9	12.5	0.3
Other/Sublet	4.9	0.0	0.0	0.0

Source: WM Enterprise Consultants

- 8.73 56% of the wholesale premises surveyed were defined as mid range, 10% as prestigious with the remaining 33% defined as budget. The mid range premises tended, however, to be the larger premises such that significantly more than 60% of the surveyed floorspace was classified as mid range.
- 8.74 50% of those surveyed had occupied their current premises for more than 10 years, with a further 25% occupying their current premises for between 5 and 10 years. 6% had only been established for 1-2 years with one company having moved within the year.
- 8.75 56% of the surveyed wholesale businesses had always been at their current address in the council area. Of these, 60% had been there for more than 10 years and 22% for between 6 and 10 years. Only 6% had moved from outside the Central Lancashire area with 29% moving within this area. Out of these 14 businesses, 3 (21%) moved between council areas with the remaining 79% being retained within the area.
- 8.76 65% of wholesale premises were on one floor only. The majority of the remainder were on two floors, with the exception having three floors. This may indicate the age of some of the buildings as typically the storage is retained on the ground floor with any second storey being used for offices.
- 8.77 19% of organisations in this sector felt that their premises were not suitable for their business. Size was mentioned as a key problem although the age of the building and allied problems (difficult to maintain and on three floors) was also mentioned. 56% of those who stated that the premises was not suitable for their business came from Chorley compared with just one organisation from South Ribble.
- 8.78 Half the companies did not consider there to be any major problems facing their business. Those that did have problems tended to be fairly in line with standard business problems, such as red tape and market pressure. Size constraints (10%) and the rising cost of running a business (10%) were the main problems after market pressure. Access to roads/motorways tended to be local site issues rather than anything to do with the transport infrastructure.

8.79 87% of wholesalers in Chorley thought the place to be a good business location, compared to 80% in South Ribble and 77% in Preston. Preston was the most polarized of locations with half saying that the area was very good for business (compared with 25-30% in the other areas) but 13% thought that the area was very poor.

8.80 Specific traffic improvements and reducing congestion was a key area where improvement was wanted along with a reduction of crime and more investment in the area especially in the premises. Better site advertising was also mentioned by more than one wholesaler as an issue.

Growth Plans

8.81 48% of the surveyed businesses were planning to increase turnover, with 44% of the total expecting an increase in employment numbers. Despite this, only 21% of those expecting to expand believed that their growth would impact on their premises requirements. Overall, the immediate expansion plans of the surveyed businesses would add 13% of floorspace to that currently occupied by the surveyed warehouse businesses. This was highest in South Ribble (35%) due to one large development compared to 6% in Preston and 8% in Chorley.

8.82 The companies with additional premises requirements did not expect to be able to meet those requirements by adding to their additional premises. As such, they would be seeking alternative premises in the locality. The timescales for these developments tended to be more immediate than for manufacturers with the majority of foreseeable development happening within the next two years.

8.83 62% of companies felt that their current site was suitable for their business needs. Those who were negative about the area in terms of its having suitable buildings for their needs, mentioned cost and size of premises. Although a majority of those who did not feel that their current premises were suitable felt that there were other places in the area were suitable due to the size of local premises.

8.84 For those who were unconvinced that the area had suitable premises, the feeling was that Preston and Leyland were more suitable than other areas for new premises.

8.85 66% of wholesalers expected to see an increase in turnover over the longer-term and none expected a decrease. 48% expected employment to increase over the same period with sales staff, skilled manual workers and machine operatives in this case and drivers, being the key employment categories affected.

8.86 19% of the total and 31% of those expecting to expand envisaged that their growth would lead to them requiring additional space. Overall, the expanding businesses were expecting to require around 4,000 square meters of additional space. Although this does not include the amount of space required by one company that was anticipating moving, and 4 other firms that were unsure of the required premises needed, they felt that there was enough land for them to expand on their current site.

Transport and Storage

Survey Sample

- 8.87 29 transport and storage companies, with a combined employment total of 1,373 people, were covered by the survey. 69% of the companies were independent, 9% the head office location of multi-site operations and the balance either branches or subsidiaries.

Workforce

- 8.88 93% of the employees were full-time employees and 7% were part-time. At any one time, only 88% of staff were on site. 18% of staff lived locally to the site, however this varied from 43% in Preston to 7% in Chorley and 10% in South Ribble.
- 8.89 The average amount of floorspace per person was 57.2m². If those off-site are discounted, the floorspace per person rises to 69.2m². Preston showed the highest density of people with 40.4 m² per person compared to 57.9 m² in Chorley and 63.3 m² in South Ribble.

Site Characteristics

- 8.90 24% of the transport and storage businesses interviewed operated from freehold premises, as against 62% that operated from leasehold premises and 3% under licence. 41% were pure distribution depots, with the majority of the others being either predominantly offices or a mixture of office and depot facilities.
- 8.91 10% of the businesses operated from prestigious premises, 69% from mid range premises and 21% from budget premises.
- 8.92 Nearly three quarters of the surveyed businesses had been trading from their current premises for more than five years as against only 3% that had been trading from their current premises for two years or less.
- 8.93 72% of the surveyed businesses had always been there with the rest relocating from nearby. Just one company had moved into the area from outside the Central Lancashire area and this had bought an existing business there. Clearly the major pull for relocation was to move nearby to take advantage of closeness to current staff (15%) and access to the motorway (10%). The main reason for relocating was simply the size of the building (31%).
- 8.94 The average site density of 0.46 was much higher than previous surveys in the North West where land was relatively cheaper and the site density was less than 0.1 and the South East where the site density was closer to 0.3. In the case of the South East borough, this had a far higher density of people per m², which may simply indicate a much higher proportion of covered storage space in Central Lancashire.

Table 8.8: Site Density indicators for Transport and Storage Premises by Council Area

	m ² per person		
	Total employment	Maximum number on site at any one time	Site Density
Chorley	57.89	76.42	0.40
Preston	46.95	62.53	0.56
South Ribble	63.33	64.51	0.53

Source: WM Enterprise Consultants

- 8.95 As can be seen from the table above, all areas showed relatively high site densities from 0.40 in Chorley to 0.56 in Preston.
- 8.96 The available Floorspace was allocated by the surveyed companies in this sector to the following areas:

Table 8.9: Percentage of Floorspace In Surveyed Transport & Distribution Businesses Used for Stated Activity

Activity	% of Floorspace in Transport and Distributions			
	Total	Chorley	Preston	South Ribble
Manufacturing	1.5	0.3	0.0	4.1
Office	19.0	15.7	18.4	24.1
Warehousing	75.4	75.8	81.5	71.8
Research & Development	0.0	0.0	0.0	0.0
Retail	0.4	0.7	0.2	0.0
Other/Sublet	3.7	7.6	0.0	0.0

Source: WM Enterprise Consultants

- 8.97 From the above, the largest single use made of the available space was for warehouse activities, which accounted for 75% of the space. A further 13% was used for offices, with the balance used for workshops and storage vaults. 69% of premises were single storey, with the balance having two storeys. Other was a terminal building.
- 8.98 14% of companies felt that their premises were unsuitable for their needs, however these tended to be the smaller companies who were looking to expand. All but one of these was in the Preston area. Limited size, old premises or lack of room for expansion were the main reasons why the premises were unsuitable.
- 8.99 69% of the surveyed businesses stated that they were not experiencing any particular problems. For those with problems, the main issue was market pressure. These were mentioned by 15% of respondents. Other issues mentioned included health and safety legislation, and additional costs to the business such as fuel prices. Only one organisation mentioned existing site constraints amongst the major issues for their business.
- 8.100 Businesses in the sector generally felt that Central Lancashire area was a good location for their business, primarily due to access to the motorway networks, and also because of the quality of premises and the attractiveness of the area for investment. Concerns mainly focussed on the availability of new employment sites especially in South Ribble and business rates. Areas where immediate attention was most required were in improving availability of new sites for small distribution operators and access to industrial sites. The cost of land was also considered prohibitive by some companies in this sector and may explain the high site densities.

Growth Plans

- 8.101 Only 31% of respondents expected their turnover to increase in the short-term. 38% expected employment to increase over the same period, but employment growth was not necessarily linked to output growth. Despite this, only one of the surveyed businesses was expecting to see a short-term drop in both turnover and employment.
- 8.102 Only 21% of the companies expected an increase in terms of their property requirements. The scale of the anticipated requirements were, however, difficult to gauge, as a number of companies were unsure about the extent

of any increase especially the larger ones. A required expansion of at least 5% of floorspace is required and figures closer to 15%, based on those that did give figures may be required. South Ribble showed the most pent up demand in terms of premises required.

- 8.103 Businesses were equally split between those that felt their premises/land could meet the short term change and those that did not know as they had not planned for how to meet any expansion.
- 8.104 In the longer-term, 52% of respondents expected their turnover to grow and 48% expected employment requirements to grow, whilst 7% expected a decrease in either area. A shortage of drivers, warehouse workers and admin staff were the main anticipated employment problems.
- 8.105 14% of respondents expected that their longer-term premises requirements would be higher than their current usages. Although some respondents were unable to indicate their future premises requirements, the general expectation is that a minimum of 4% increase over current floorspace provision will be needed. Two companies are looking to relocate to meet their expansion plans and one felt it was unlikely to continue within the area.

Office Based Activities

Survey Sample

- 8.106 In terms of the number of businesses surveyed, office based activities formed the largest sub-group in the study, with 93 respondents. They accounted for 30% of respondents in Chorley, 31% in Preston and 25% in South Ribble.
- 8.107 Of these, 70% were independent businesses, 8% head offices the rest were branches or subsidiaries of larger companies.

Workforce

- 8.108 Together, the survey respondents employed a total of 1,883 people, an average of around 20 per business. 9% of the employees covered by the survey lived locally, within a mile. This finding is not unexpected, with office based workers traditionally the most likely to commute long distances to work. The majority of workers came from within the Preston City Council area as 36% resided in this area.
- 8.109 92% of staff were full-time employees and 8% were part-time. In most cases up to 94% of the staff could be on the premises at any one time.

Site Characteristics

- 8.110 Overall, office space per person was 20.1m². This was slightly higher in South Ribble 21.3 m² compared to Preston 15.7 m². Due to the nature of the sector, there was little difference between the figures for total employment and those for the maximum number of staff on site at any one time.

Table 8.10: Site Density indicators for Office Based Activities by Council Area

	m ² per person		
	Total employment	Maximum number on site at any one time	Site Density
Chorley	18.39	18.39	1.0

	m ² per person		
	Total employment	Maximum number on site at any one time	Site Density
Preston	15.68	18.45	1.0
South Ribble	30.25	30.81	0.9

Source: WM Enterprise Consultants

- 8.111 By Standard Industrial Code (SIC) code Research and Development sites were the least densely occupied with 32.1m² per person. Computer based activities (15.3); real estate (16.1 m²) and Renting equipment without a driver (16.8m²) were the most densely occupied service sectors.
- 8.112 The following tables indicate the difference in site density based on this SIC Code. The finding that financial intermediation businesses have more floorspace per person than the average for business services fits in with other previous surveys on employment land.

Table 8.11: Site Density indicators for Office Based Activities by SIC code

	m ² per person		
	Total employment	Maximum number on site at any one time	Site Density
Research and Development	32.1	32.1	0.51
Financial Intermediation	21.2	21.2	2.43
Computer based activities	15.3	16.7	0.86
Real estate	16.1	16.3	1.37
Renting equipment without a driver	16.8	18.6	0.35
Other business activities	23.1	21.73	1.09

- 8.113 35% of the surveyed offices were freehold, 54% leasehold and 11% occupied under a licence agreement. The practice of occupying premises under a licence was particularly prevalent amongst financial service sector respondents. 57% of buildings were considered by their occupants to be mid range, 18% saw their buildings as prestigious and the remainder considered their offices to be budget.
- 8.114 39% of respondent businesses were on a single floor, 47% on two floors, 12% on three floors and the remaining 2% on four or more floors. This does not necessarily mean, however, that some of the offices were single storey. It merely means that the surveyed activity only took place on one floor and may be one reason why the site density figures for the area, at 0.93, are significantly lower than the ODPM guidelines (3.6). Preston and Chorley have a higher site density (just over 1.0) than South Ribble (0.79). There are, however, even in Preston, few obvious office blocks in the Central Lancashire area, when it is compared to major urban areas such as London or Manchester.
- 8.115 Office based businesses were the most likely of all those surveyed to have only been trading for a relatively short period of time in their current location. 25% had been at their current location for less than 2 years as against 35% that had been at their current address for more than 10 years. The remaining 40% had been in their current location for between 3 and 10 years.
- 8.116 Of the businesses trading at their current address for less than two years, 65% were relocations from within the Borough, 13% new businesses and

- 17% had moved into the area. The remaining 4% was accounted for by a company that had purchased a business in the area.
- 8.117 Overall, 38% of the businesses surveyed had always been at their present address. 48% had relocated within the Central Lancashire area, and the balancing 13% were relocations into area.
- 8.118 Relocations within the area were all for reasons of expansion and included a small number of businesses that had started at home and then located into formal business premises. As such, there is a need to ensure that there is an adequate supply of office premises to meet the varying needs of start-ups, growing businesses within the Central Lancashire area and incomers.
- 8.119 Competing sites to the sites selected by respondents tended to be elsewhere within their respective council area but around 46% did not look at another location. Reasons for selecting the current location were proximity to where key staff live, (33%), access to the motorway, (22%), and proximity to customers, (28%). Premises considerations were comparatively low on the selection criteria as size of premises is often the most prominent reason, yet only 15% mentioned this.
- 8.120 The majority of the surveyed space was devoted to office type activities. Specifically, such activities accounted for 78% of the available space. As can be seen from Table 12, the floorspace for South Ribble is very different from the other two areas due to a number of R&D companies in the area. Other refers to training rooms and conference rooms.

Table 8.12: Percentage of Floorspace In Surveyed Office based Businesses Used for Stated Activity

Activity	% of Floorspace in Office based businesses			
	Total	Chorley	Preston	South Ribble
Manufacturing	2.3	1.0	2.6	0.0
Office	78.1	77.6	93.6	67.7
Warehousing	5.8	4.2	2.4	10.7
Research & Development	6.4	1.7	0.2	17.8
Retail	0.0	0.0	0.0	0.0
Other/Sublet	7.4	15.5	0.0	0.0

Source: WM Enterprise Consultants

- 8.121 16% of the respondents considered that their premises were not suited to their current needs. Whilst lack of car parking/delivery space were mentioned, the main reasons were the lack of space and the need for significant renovation/refurbishment of the site often due to the age or internal composition of the building.
- 8.122 45% of companies stated that there were no major problems affecting their business. For those businesses with problems, a shortage of appropriately skilled staff was the main issue, (mentioned by 16% of respondents), followed by legislation issues. Existing site constraints was an issue for 8% of these businesses, in all cases it was the second of their three problems, rather than the primary one.

Growth Plans

- 8.123 55% of the surveyed businesses expected to see turnover increase in the short-term. Of these, 93% expected to recruit additional staff, whilst the remainder expected to be able to cope with their existing staff complement.

- 8.124 3% of the surveyed businesses expected to see a reduction in turnover and an associated loss of staff, but only in one case was there a reduction in premise space, due to retirement.
- 8.125 44% of the businesses expecting to recruit additional staff, (24% of all businesses), also expected to have an increased floorspace requirement. In the short-term, an additional 5,000m² is required. This amounts to around an additional 13% on the current office floorspace covered by the survey. The majority of this extra space is expected to be office space (66%) and warehousing (31%). Some industrial and other usage (music studio and training rooms) were also envisaged.
- 8.126 Growth varied amongst the council areas. Businesses in South Ribble were anticipating a 19% growth, with 60% of this being storage space compared to 17% in Preston and 92% allocated for office space. Chorley anticipated premises growth of just 7% with 84% in office space and 15% storage.
- 8.127 60% of those asked, stated that they felt that there were suitable premises in the Central Lancashire area to meet their business needs. Reasons varied, with the most popular responses being due to the size and quality of the available premises and access to the motorway.
- 8.128 Those that did not think that there were any suitable premises in the Central Lancashire area were predominantly based in Preston, but considered the issue to be a wider problem. Specifically, respondents did not feel that their needs could be met in a different part of the area from that in which they were located. Despite this, 88% of respondents would wish to stay in the Central Lancashire area although 38% were looking to relocate outside the Central Lancashire area, generally looking at areas with neighbouring areas such as Blackburn with good motorway links.
- 8.129 74% of the surveyed businesses expected to see their turnover increase in the medium to long term, with only 2% expecting their turnover to decrease. On average, those expecting turnover growth expected a rate of growth of around 14% per annum, although the modal rate was between 5 and 10% per annum.
- 8.130 60% of respondents expected to increase their staff numbers over the longer term, but at a slower rate than the anticipated rate of growth in turnover. On average, the expectation was that staff numbers would grow by between 5 and 10% over the medium term. All of those expecting a decrease in turnover were also expecting a reduction in staff numbers.
- 8.131 Those companies able to quantify their requirements were expecting to require an additional 5,800m² of floorspace. This equates to an 11% increase on the floorspace currently occupied by all respondents.
- 8.132 Strongest demand for office space in the long-term appears to be in Preston, where an increase of around 20% is expected, compared to 9% in South Ribble and 6% in Chorley.

Construction

Survey Sample

- 8.133 31 companies, employing a total of 660 people, were surveyed in this sector. 77% of the companies were independent and 10% were head offices with the remaining 13% being subsidiaries of larger firms. The most common type of building was offices (26%) and mixed-use office and

warehouse (26%). Although a number had a workshop, although none considered themselves to be factory units. The remainder were residential.

Workforce

- 8.134 91% of the employees of the surveyed businesses were full-time, and only 9% part-time. Only 20% lived within a mile to where their employing business was based, although 50% of employees lived within the same council area as their premises.
- 8.135 48% of construction businesses had always been at their present address in Central Lancashire area, with the same percentage relocating to their present address, from within this area. 1 company had purchased a business that was already trading here.
- 8.136 The construction industry shows a similar sort of level of mobility as the services sector, in that 42% of businesses have been in the area for more than 10 years and 29% have moved locations within the last 2 years.

Site Characteristics

- 8.137 The importance of site work explains the relatively low amount of space per person, which averages out at 14.1 square metres per person, even allowing for the relatively high proportion of storage space.
- 8.138 The construction industry is different from other sectors as the majority of time is spent on other peoples' properties. For this reason, there is a significant difference between floorspace per person (14.1m²) and the floorspace for the maximum number of employees on site at any one time (24.2 m²).
- 8.139 Construction firms based in Preston had significantly more room per person than those in South Ribble and Chorley. In Preston the employment space was 20.6 m² per person (30.6m² per person for those on the site), compared to Chorley (11.5 m² per person employed and 25.13 m² per person on the site) and South Ribble (10.23 m² per person employed and 17.32 m² per person on the site).

Table 8.13: Site Density Indicators for Construction Companies by Council Area.

	m ² per person		
	Total employment	Maximum Number on site at any one time	Site Density
Chorley	11.15	25.13	0.27
Preston	20.58	30.60	0.57
South Ribble	10.233	17.32	0.58

Source: WM Enterprise Consultants

- 8.140 Of the nine companies that had started trading in the last 3 years, one-third were in the premises that they started in and the others had moved within this time to another location in the local vicinity. Although a proportion of these premises were residential, this does indicate that there is a reasonable level of potential premises in the area.
- 8.141 Of the businesses that had relocated, 53% had not considered any other location, whilst only 13% had considered sites outside of their immediate eventual location and no companies looked outside the Central Lancashire area as a whole.
- 8.142 The most important factor for construction companies in selecting a site was proximity to where key staff lived, (39%), with access to the motorway,

(23%) and local business climate (16%), the next most important considerations. This emphasizes the importance of mobility and the local market to businesses in this sector.

- 8.143 48% of the properties from which the surveyed construction companies operated were freehold and 45% leasehold. Only 3% were rented under a licence agreement. The relatively high proportion of freehold properties may be due, in part, to some businesses being based in the owner's residential accommodation.
- 8.144 Site density varied considerably with an overall site density of 0.47, in South Ribble and Preston the figure was around 0.58 compared to 0.27 in Chorley. This suggests that there was more outside storage in the construction sites in Chorley than in the other two areas.
- 8.145 In terms of the floorspace there is little difference between Chorley, Preston and South Ribble, with office space and warehousing being the main elements of construction premises, although some workshop space was also provided. South Ribble had marginally more office space, which partially explains why the site density was relatively high (0.57) and the floorspace per person was comparatively compact (10.2m² per person).

Table 8.14: Percentage of Floorspace In Surveyed Construction Businesses Used for Stated Activity

Activity	% of Floorspace Construction			
	Total	Chorley	Preston	South Ribble
Manufacturing	11.0	11.1	10.0	12.8
Office	46.9	39.6	47.9	50.2
Warehousing	41.2	49.4	42.1	37.0
Research & Development	0.0	0.0	0.0	0.0
Retail	0.0	0.0	0.0	0.0
Other/Sublet	0.0	0.0	0.0	0.0

- 8.146 Just 6% of the surveyed businesses believed that their premises were not suited to their current needs. The sole reason given for premises not being suitable was that they were too small, although one mentioned that an expansion was needed to make the premises more environmentally friendly.
- 8.147 Although the construction industry has a skill shortage, this was only a major problem for one of the companies surveyed. The main problem that the sector was facing was the perennial one of cash flow.
- 8.148 In general, the construction businesses surveyed viewed the Central Lancashire area as a good or very good place in which to base their businesses, mainly due to the size, quality and flexibility of the available premises, and the access afforded to the motorway network. Marginal negatives focused on the availability of new sites and the level of business rates.

Growth Plans

- 8.149 42% of the businesses surveyed were anticipating expanding their businesses and 32% expected this to translate into increased employment. Of those who expected an expansion in their businesses, 19% expected an increase in their floorspace requirement. In this sector, a number of those who were planning expansion mentioned that this would be achieved

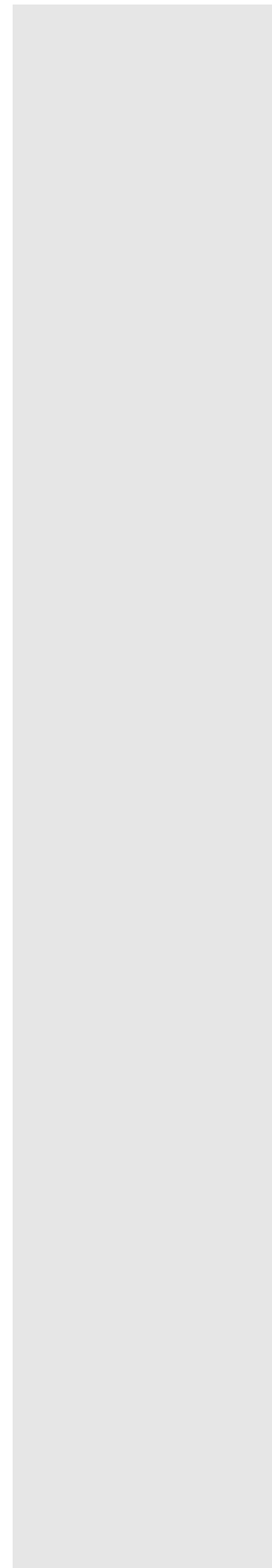
- through greater use of subcontractors (who did not need premises), rather than through directly employing new people.
- 8.150 The short-term additional floorspace requirement was equivalent to 11% of the total Floorspace surveyed. Higher growth (21%) was anticipated in South Ribble, due to one relatively large expansion. The growth rate overall is marginally higher than that seen in other surveys (typically 6 to 8%)
- 8.151 Most of the businesses looking to expand were seeking additional office space. This accounted for 48% of the increase and workshop space (46%). The high requirement for industrial space is based on a relatively small sample and only one of the organisations looking for increase industrial space did not have a relatively high proportion of workshop space already.
- 8.152 In the short-term, 71% of businesses felt that their existing buildings were suitable for their current needs. Those, for whom this was not the case, were businesses that needed larger premises to accommodate their expansion plans. Only two companies felt that there were not the buildings suitable for its short-term aspirations within the boundaries of the Central Lancashire area and this was due to a lack of alternative accommodation although size and quality of premises was an issue for one of the two. Others felt that there were adequate premises, highlighting their size and proximity to customers.
- 8.153 55% of the surveyed businesses were anticipating longer-term growth as against 3% (one company) that were forecasting a decline. Turnover growth was expected to translate into expected increases in employment for 45% of businesses. Anticipated requirements were for estimators and skilled construction workers.
- 8.154 In just under half of these companies there was expected to be an increase in the size of premises required (one fifth of the sector total). The expected growth from those companies that gave figures indicated an increase of around 1300m² or 13% of the surveyed current floorspace figure. Growth was anticipated to be slightly lower in the Preston area where there is currently a lower density in terms of floorspace per person.

Survey Conclusions

- 8.155 The main conclusions that can be drawn from the findings from the employer survey are:
- n The Central Lancashire Area is viewed as a good place in which to do business. Driving this view is ICT infrastructure, the accessibility of the area by road, highly functional buildings and size of the premises.
 - n The main disadvantages of the area are the affordability of housing and the availability of sites. Sites for new and small businesses are particularly in demand. This taken together with the lack of recently started up manufacturing businesses (in comparison to other surveys in areas as diverse as Cheshire, Yorkshire and Kent) could indicate that damage is already being done to the local economy by lack of such premises.
 - n Manufacturing, warehouse and distribution businesses have not tended to relocate into the Central Lancashire area and a number of companies are now looking outside the area with anecdotal evidence suggesting that incentives offered by neighbouring areas are enticing a minority of businesses away.
 - n The majority of businesses (77%) are, however, looking to meet their expansion plans from within the Central Lancashire area, with modification of

buildings or building on current land that they own. Modification is considered to be the most attractive option due to the high cost of land.

- n Site density, particularly amongst those who utilise warehousing space, is relatively high and in some cases over the ODPM guideline figures, yet many businesses expect to expand on their current site due to relatively high land prices. There are therefore questions about how sustainable such expansion may be in the future.
- n Many of the larger manufacturing and warehouse and distribution businesses are controlled from outside of the area. Ultimately, this means that decisions regarding activities and land use in the Central Lancashire area will continue to be made remotely, even though the indications are that larger employers are those most happy with the area for conducting business.



9. Conclusions and Recommendations

9.1 This section of the report sets out a summary of key findings and recommendations.

Forecast Employment Land Requirements

Small Area Forecasting Model

9.2 Chapter 7 sets out forecasts utilising a small area forecasting model specified by reference to local population, employment and other available data. This model is, in turn, driven by the labour market and output forecasts for the UK and for the North West region produced by the Cambridge Econometrics national and regional forecasting models.

9.3 In addition to the base forecast (which is considered to represent the best estimate of change over the period) a number of other forecasts have been produced based on various assumptions and scenarios which are explained at the end of Chapter 7. The following tables provide a range of forecasts for Central Lancashire and for the individual Council areas. It is important to emphasise that forecasts refer to the change in the amount of land to be occupied by different B Class employment sectors over the study period. As such they represent the absolute minimum amount of land required to accommodate the sector's activity across the period.

9.4 In simplistic terms, the base forecast is derived through applying site density information obtained through the business survey (and reflected in Tables 7.35 to 7.38 in Chapter 7). The high forecast uses (national) site density ratios as identified by the ODPM.

Table 9.1: Minimum Forecast Employment Land Requirements for Central Lancashire (2007 – 2021)

Forecast	Office	Manu.	W&D	Total
Base Forecast	16.7 ha	-95.6 ha	25.1 ha	-53.8 ha
High Pop. Growth Forecast	19.4 ha	-85.6 ha	34.9 ha	-31.8 ha
Labour Productivity Change Forecast	16.7 ha	-45.7 ha	25.1 ha	-3.9 ha

Table 9.2: Minimum Forecast Employment Land Requirements for Chorley (2007 – 2021)

Forecast	Office	Manu.	W&D	Total
Base Forecast	4.3 ha	- 5.1 ha	3.9 ha	3.1 ha
High Pop. Growth Forecast	6.4 ha	-2.4 ha	9.3 ha	13.3 ha
Labour Productivity Change Forecast	4.3 ha	-0.6 ha	3.9 ha	7.6 ha

Table 9.3: Minimum Forecast Employment Land Requirements for Preston (2007 – 2021)

Forecast	Office	Manu.	W&D	Total
Base Forecast	7.5 ha	-36.6 ha	13.6 ha	-15.5 ha
High Pop. Growth Forecast	11.0 ha	-28.5 ha	27.6 ha	10.1 ha
Labour Productivity Change Forecast	7.5 ha	-16.5 ha	13.6 ha	4.6 ha

Table 9.4: Minimum Forecast Employment Land Requirements for South Ribble (2007 – 2021)

Forecast	Office	Manu.	W&D	Total
Base Forecast	5.1 ha	-54.0 ha	7.5 ha	-41.4 ha
High Pop. Growth Forecast	7.8 ha	-34.0 ha	17.2 ha	-9.0 ha
Labour Productivity Change Forecast	5.1 ha	-28.7 ha	7.5 ha	-16.1 ha

- 9.5 In Central Lancashire there is an approximate 50 hectare difference between the base forecast and the high labour productivity change forecast, which assumes less of a decline in the land requirement for manufacturing.
- 9.6 Similar trends are generally replicated in each local authority area with all three local authorities experiencing a decline in the manufacturing sector and a growth in warehousing and distribution and offices in each forecast scenario in Tables 9.1 to 9.4.
- 9.7 As noted above, the forecasts represent the absolute minimum amount of land needed to accommodate the sectors' activities. This is because the figures do not allow for local market churn, the associated need for there to be a selection of vacant sites and premises to offer sufficient opportunities for new business start ups, expansion, relocation and inward investment for a range of business sizes as well as accommodating aspirations for economic growth based on specialist knowledge sectors. Equally, the figures are stated with no reference to the level and nature of existing employment land supply.
- 9.8 On this basis, it is important that future provision substantially exceeds the total requirements in the above tables to robustly meet forecast change in addition to any identified demand considerations.
- 9.9 With specific regard to the forecast reduction in manufacturing requirements, it is important to note that this is derived on a floorspace per employee basis. This base forecast assumes a constant floorspace per employee ratio over the study period but due to the nature of modern automated manufacturing moving towards being less employee intensive, this ratio could change in the future. As such there needs to be flexibility in the amount of land available. Forecast decline in terms of space may therefore be larger than actual real reductions in needs as in some cases space requirements could remain the same but employee requirements decline. Thus, it will be important to plan positively for future manufacturing by ensuring that anticipated labour productivity gains are taken into account when allocating employment land.

Planning Policies and Strategies

National and Regional Level

- 9.10 At the national and regional level, a number of key economic and planning strategy objectives can be summarised as follows:

Strategic Economic Development Objectives

- Attraction of higher value businesses, particularly those within key economic sectors such as advanced manufacturing / engineering (e.g. aerospace), environmental technologies, biomedical, tourism and conference sectors and creative industries;
- Promotion of clustering of existing and new activities and development of knowledge-based industries, focussed around research establishments, higher education institutions, major hospitals and technology-based businesses;
- Identify locations for Regionally Significant Economic Development that are capable of delivery, are highly accessible, well related in relation to high levels of worklessness, areas in need of regeneration and, meet the following more specific roles and requirements:

Role of Regionally Significant Site	Locational Requirement
Office development	In and adjacent to city and town centres
Knowledge-based services	Cluster close to universities, major hospitals or other research establishments
Knowledge-based manufacturing	Well connected to facilities by transport and ICT links
Logistics and high-volume manufacturing	Well connected to primary freight networks

- Identification of sub-regionally important employment sites (to accommodate key economic sectors) and local opportunities to secure a balanced portfolio of sites; and
- Develop and diversify the economy in rural parts of the Region.

Strategic Planning Objectives

- Maximise the use of Brownfield land and promote economy in use of land, including through the restoration of derelict and neglected land and buildings. Promote the modernisation and diversification of older manufacturing industry and their premises;
- Adopt a sequential approach to meeting development needs to reduce the need to travel, particularly for uses which generate travel demand. For offices, this includes directing development within or adjoining main city, town or district centres and near to public transport interchanges in urban areas;
- Plan for warehousing and distribution uses to avoid the unnecessary movement of goods by road, also taking into account of the need for proximity of labour supply, access by road, rail and ports / airports and for sites to be of a sufficient scale to allow for flexible development and expansion; and
- Ability to accommodate mixed use development.

9.11 During the preparation of this study, draft PPS4 was published for public consultation. Draft PPS4 includes a number of potentially significant policy changes relating to employment development, including:

- A flexible approach to the supply and use of land through planning policies to ensure increased competition and enterprise, enhanced skills and innovation, increased job opportunities and greater investment;

- Avoiding the designation of sites for single or restricted use classes wherever possible; and
- Local authorities should take a constructive approach to changes of use where there is no likelihood for demonstrable harm.

9.12 As PPS4 is still draft and does not yet form formal Government Policy (and could well change as a result of the consultation process), we have not sought to revise our conclusions or recommendations with regard to its emerging provisions at this stage. A number of the recommendations made in this report, such as in relation to identifying sites with potential for accommodating non-B Class employment-generating uses, mixed-use development and release to other forms of development do however, in part, reflect the emerging direction of PPS4.

Sub-Regional and Local Level

9.13 The Central Lancashire City Region's 'Core Area' of Preston, South Ribble and Chorley is seen as a focus for economic growth. The following table summarises the main spatial priorities and objectives at the sub regional and local level:

Local Authority Area	Summary of Priority
Chorley	<ul style="list-style-type: none"> • Identification of Chorley as a Key Service Centre to support surrounding villages and rural areas • Aim to strengthen its role as a market town , strengthen retail and leisure activities to complement Preston • Address issues: of low take up rates of employment land; relatively high vacancy levels; scale of out-commuting; and economic dependence on vulnerable sectors
Preston	<ul style="list-style-type: none"> • Identification of Preston as a Regional City and location to maximise growth opportunities as a key economic driver for the City Region • Regeneration of the City Centre • Inner East Preston – focus on socio economic regeneration to address deprivation • Address areas of acute deprivation and deliver a city centre commercial quarter / the Tithebarn scheme to enhance the City's reputation for business
South Ribble	<ul style="list-style-type: none"> • Identification of Leyland as a Key Service Centre to support surrounding villages and rural areas • Aim to retain industry in Leyland and consolidate the centre • Address issues of low take up rates of employment land and scale of out-commuting
General	<ul style="list-style-type: none"> • Consolidation of local centres in sensitive locations that meet the needs of the communities.

9.14 On a City Region level, adopted RSS identifies the following two sites as Regionally Significant Development Locations:

- Royal Ordnance, Chorley; and
- Cuerden Regional Business Park, South Ribble.

9.15 Emerging draft RSS sets out the following broad Locations for Regionally Significant Economic Development in the Central Lancashire City Region:

Site	Broad Location
Regional Investment Site	North West Chorley
	North of Leyland / Bamber Bridge*
Knowledge Nuclei Site	Central Preston

* Identified as a 'reserve site' for accommodating inward investment which would otherwise be lost to the Region

Overview of Market Demand

- 9.16 Across the three areas of Chorley, Preston and South Ribble, Preston has the largest commercial property market with a strong bias towards industrial property. It has the largest areas for expansion at the designated Employment Areas on the outskirts of the city close to the motorway connections. Its city centre and inner areas are reasonably densely developed, and without going into open countryside there are few identified opportunities for large-scale new employment development in these locations. Opportunities for new premises are more likely to come from redevelopment of older stock.
- 9.17 The only sub-area where the bias is towards the office sector rather than industrial is in Preston city centre, which has a larger quantum of office space. Much of this is older stock being refurbished and let in smaller units, but the market is slow and rents remain relatively inexpensive. As also identified in the 2006 Central Lancashire City: Offices Needs Assessment, there appears to be some demand for offices, particularly from local companies, start-ups and expanding businesses. This demand is not always realised in Preston City Centre or within other town centres within the study area however due to a range of factors including: a limited supply of opportunities for new office development in such locations; the often secondary nature of the existing stock; and competition from out of centre employment sites which are often less constrained than central urban areas in terms of car parking and congestion.
- 9.18 South Ribble has the second largest commercial market, with its industrial sector slightly out-stripping Preston's in terms of overall size. This shows the dominance of manufacturing in the Leyland area and its particular high importance to economic wealth in the Leyland and Lostock Hall sub-areas. In comparison the office sector has very low representation with just less than 10% of the overall market in space terms, and it is spread slightly more evenly across the borough. However it is unlikely that this sector will grow significantly, certainly in the outer parishes, given the more sparsely developed areas already in existence.
- 9.19 Chorley has a commercial property market around half the size of that in Preston, again with a heavy bias towards the industrial sector (around 85:15 split). Within the borough there is a heavy concentration of stock in

the central area, and the eastern and western sub-areas offer very little in the way of offices particularly.

Business Survey Main Conclusions

9.20 The main conclusions that can be drawn from the findings from the employer survey are:

- The Central Lancashire Area is viewed as a good place in which to do business. Driving this view is ICT infrastructure, the accessibility of the area by road, highly functional buildings and size of the premises.
- The main disadvantages of the area are the affordability of housing and the availability of sites. Sites for new and small businesses are particularly in demand. This taken together with the lack of recently started up manufacturing businesses (in comparison to other surveys in areas as diverse as Cheshire, Yorkshire and Kent) could indicate that damage is already being done to the local economy by lack of such premises.
- Manufacturing, warehouse and distribution businesses have not tended to relocate into the Central Lancashire area and a number of companies are now looking outside the area with anecdotal evidence suggesting that incentives offered by neighbouring areas are enticing a minority of businesses away.
- The majority of businesses (77%) are, however, looking to meet their expansion plans from within the Central Lancashire Area, with modification of buildings or building on current land that they own. Modification is considered to be the most attractive option due to the high cost of land.
- Site density, particularly amongst those who utilise warehousing space, is relatively high and in some cases over the ODPM guideline figures, yet many businesses expect to expand on their current site due to relatively high land prices. There are therefore questions about how sustainable such expansion may be in the future.
- Many of the larger manufacturing and warehouse and distribution businesses are controlled from outside of the area. Ultimately, this means that decisions regarding activities and land use in the Central Lancashire Area will continue to be made remotely, even though the indications are that larger employers are those most happy with the area for conducting business.

Overview of Supply

9.21 For the assessment of employment land supply, and also elsewhere in this study, where possible, the study area has been divided into sub areas for the purposes of analysis. As a broad guide, **Table 9.5** illustrates the general sub-division applied by way of identifying the 'best fit' of associated wards and ONS output areas. A plan showing the approximate boundaries of the study sub-areas is included at **Plan 9.1**.

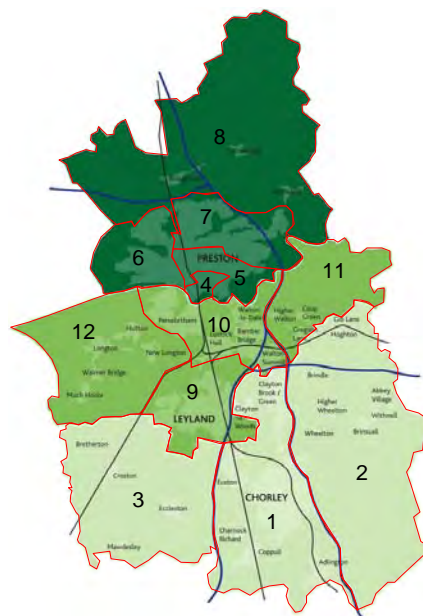
Table 9.5: Sub-Division of the Study Area

Local Authority Area	Sub Area (Plan Ref)	Ward	ONS Middle Layer Super Output Area*
Chorley Borough Council	Central (1)	Clayton-le-Woods North	
		Clayton-le-Woods West and Cuerden	
		Clayton-le-Woods and Whittle-le-Woods	Chorley 001
		Astley Village and Buckshaw	Chorley 003
		Euxton North	Chorley 005
		Euxton South	Chorley 006
		Chorley North East	Chorley 008
		Chorley North West	Chorley 009
		Chorley East	Chorley 010
		Chorley South West	Chorley 012
	Chorley South East	Chorley 013	
	East (2)	Coppull	
		Adlington and Anderton	
		Brindle and Hoghton	Chorley 002
Wheelton and Withnell		Chorley 004	
West (3)	Pennine	Chorley 014	
	Heath Charnock and Rivington		
Preston City Council	City Centre (4)	Lostock	Chorley 007
		Eccleston and Mawdesley	Chorley 011
	Inner Area (5)	Town Centre	Preston 017
		St Matthews	
		St Georges	Preston 011
		Fishwick	Preston 012
		Deepdale	Preston 014
		University	Preston 015
	Western Suburbs (6)	Moor Park	Preston 016
		Tulketh	
Lea			
Ingol		Preston 005	
Eastern Suburbs (7)	Riversway	Preston 008	
	Cadley	Preston 010	
	Greyfriars	Preston 013	
	Ashton		
	Larches		
Rural (8)	Ribbleton	Preston 003	
	Brookfield	Preston 004	
	College	Preston 006	
	Sharoe Green	Preston 007	
	Garrison	Preston 009	
	Preston Rural East	Preston 001	
	Preston Rural North	Preston 002	

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Local Authority Area	Sub Area (Plan Ref)	Ward	ONS Middle Layer Super Output Area*
South Ribble Borough Council	Leyland and Farington (9)	Farington West	
		Farington East	
		Moss Side	South Ribble 012
		Earnshaw Bridge	South Ribble 013
		Golden Hill	South Ribble 014
		Leyland Central	South Ribble 015
		Seven Stars	South Ribble 016
		Lowerhouse	South Ribble 017
		Leyland St Marys	
	Leyland St Ambrose		
	Lostock Hall, Bamber Bridge and Penwortham (10)	Howick and Priory	
		Whitefield	
		Broad Oak	South Ribble 001
		Middleforth	South Ribble 003
		Kingsfold	South Ribble 004
		Charnock	South Ribble 005
		Walton le Dale	South Ribble 006
		Bamber Bridge North	South Ribble 007
		Tardy Gate	South Ribble 008
		Bamber Bridge West	South Ribble 009
	Bamber Bridge East		
	Lostock Hall		
	Eastern Parishes (11)	Samlesbury and Walton	
		Coupe Green and Gregson Lane	South Ribble 002
	Western Parishes (12)	Longton and Hutton West	
		New Longton and Hutton East	South Ribble 010
		Little Hoole and Much Hoole	South Ribble 011

Plan 9.1: Broad Extent and Location of Study Sub Areas



9.22 **Table 9.7** provides an overview of vacant land across the Central Lancashire Area (potentially) available for employment development,

arising from extant planning permissions and local plan allocations specifically identified and assessed as part of this study. Separate tables and associated commentary on the supply of land and premises has also been prepared for each study sub-area. The main supply components included in these subsequent tables is explained in **Table 9.6**:

Table 9.6: Sub Area Supply Tables – Explanation of Components

Supply Component	Description	Report Reference
Employment Allocations	Sites without planning permission which are allocated for B Class employment development in an adopted Development Plan	Chapter 4 (Table 4.5)
Local Plan Commitments	Local Plan employment allocations with extant planning permission or with development under construction at the time of the study for B1, B2 and B8 uses	Chapter 4 (Table 4.7)
Other Commitments	Land and buildings outside of employment allocations with extant planning permission or with development under construction at the time of the study for B1, B2 and B8 uses	Chapter 4 (Table 4.8)
Pending Losses	Land allocated for B Class employment use but with planning permission or with development under construction for alternative forms of development; or extant planning permissions or development under construction at the time of the study which would result in the loss of an existing employment use or premises.	Chapter 4 (Table 4.9)
Commitments (Net)	Local Plan and Other Commitment (Gains) minus Pending Losses	-
Owner Specific Sites	Sites identified for use by an existing occupier (for future expansion for example). In accordance with good practice, such sites should not be counted towards employment land supply until planning permission has been received.	Chapter 4 (Table 4.6)
Other 'Qualitative Assessment' ('QA') Sites	Vacant land which has been subject to a qualitative assessment as part of this study but which is neither allocated for employment use in the adopted Local Plan nor has extant planning permission or under construction.	Chapter 4 (Table 4.10)
Vacant Premises	Details of premises revealed through discussions with local agents and interrogation of various information sources.	Chapter 4 (Tables 4.2 & 4.3)

Table 9.7: Overview of Vacant Employment Land Availability within the Central Lancashire Area

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Chorley Central	Railway Road (47)	OU	Medium to long	2	8,000	-	-	Part of site allocated as extension to park and ride for Adlington Railway Station. Retention of P&R considered important. Current owner is understood to not support employment on this site.
	Botany/ Great Knowley Site (1)	GU	Medium to long	14.1	14100	42,300	0	Comprehensive approach likely needed to bring forward this large greenfield site.
	Chorley North Industrial Estate (3)	GU	Immediate - short	0.4	280	800	650	Large modern site. Opportunities for infill and intensification only.
	Cowling Farm, Cowling Road (13)	OU	Medium to long	8.5	5,680	17,000	14,150	Large greenfield site adjacent to motorway but distant from a motorway junction. Access improvement works into the site are needed from Cowling Road. Addressing constraints could elevate its role in the hierarchy.
	M61/ Botany Site (2)	GU	Immediate - short	5.74 (committed)	3,729	11,712	7,000	Large site immediately adjacent to junction 8 of M61. Site is committed for employment development (3 separate planning permissions apply).
	Red Bank/ Carr Lane (Duxbury Business Park) (17)	GU	Medium - long	2.5	1680	5,000	4,150	Car park for adjacent convention centre (now closed) and mature vegetation. Link road junction now provided. Possible pressure for residential.
	Southport Road (19)	OU	Immediate - short	2.1	8400	-	-	Vacant greenfield site owned by Lancashire County Council. Part of the site is identified as a Biological Heritage Site.
	Ackhurst Park/ Common Bank Employment Area (5)	GU	Immediate - short	(0.74 committed) (1.1 allocated without pp)	1,100 2,200	1,124 1,760	500	Extant planning permission for B1 plus further 1.1 hectares suitable for employment development.
	Brook Mill, Brook Street (53)	O	Medium - long	0.44	-	-	-	Allocated for employment redevelopment. Poor quality site with constraints will limit market attractiveness.
Group 1 Buckshaw (37)	BU	Short-medium	5.4	12,960	8,640	-	Part of Royal Ordnance site. Master plan expected for site proposing some residential and some employment. Highly attractive site to the market.	

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Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
	Southern Commercial Area Buckshaw (38)	BU	Immediate - short	17.95 (allocated without permission)	14,360	28,720	35,900	Part of the high quality Urban Village at Euxton. 18ha of this site is allocated for employment and remains without permission. Around 5 ha has permission for employment development.
				4.69 (with permission)	2,814	8,442	7,035	
	Regional Investment Site Buckshaw (39)	BU	Immediate - short	8.9 (committed)	0	7,120	33,672	Part of the high quality Urban Village at Euxton site likely to be attractive to the market and all land committed (site subject to 3 separate planning permissions for manufacturing and warehousing and distribution development).
	Stump Lane (16)	GU	Immediate - short	0.98 (committed) 0.16 ha (available)	0 600	3800 0	0 0	Close to Chorley town centre, part of this greenfield site has been committed to provide 0.98 ha of B1 industrial development. A new access is being constructed.
	Crosse Hall Street Including Weir Mill (24)	OU	Immediate - short	0.21 (part)	140	420	350	Predominantly occupied. Weir Mill is accessed separately from the north.
	Common Bank Bleach Works (20)	OU	Medium - long	2.85	-	5,500	7,250	Former bleach works site. The site is likely to have limited market attractiveness at present given a number of development constraints.
Chorley East	-	-	-	-	-	-	-	-
Chorley West	Rear of New Street, Mawdesley (46)	OU	Immediate - short	0.6	1,200	1,200	-	Scrap yard and undeveloped land within an existing employment site. Further development likely require relocation of the scrap yard.
	Twin Lakes Industrial Estate	OU	Immediate - short	1.9	1,150	3,450	-	Committed but as yet unimplemented area forming part of a generally poor quality existing industrial estate.

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Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Preston City Centre	Hill Street Car Park	MU	Medium	0.20	21,774	-	-	Site has planning approval for offices up to 21,774 sqm and a 130 bed hotel.
Preston Inner Area	Ringway/ Falkland Street (78)	GU	Immediate - short-	2.10	8,200	-	-	The site is able to provide approximately 8,200 sqm. of office floorspace through comprehensive redevelopment.
	Deepdale Street/ Fletcher Road (44)	GU	Immediate - short	1.24	-	4,960	-	Remaining land likely to be most suitable for smaller industrial-type occupiers.
Preston Western Suburbs	Preston Riversway (excluding Phase B) (20)	GU	Immediate - short	Allocated – Site D2 (0.44 ha) Committed - Site 13C (0.93ha)	5,874	1,200	660	Plot 13C has planning permission for residential-led mixed use development including offices. Plot D2 is available for a range of B Class employment uses.
Preston Eastern Suburbs	Preston East Employment Area (7)	BU	Short - Long	18.0 ha (committed)	6,750	-	47,000	Established employment site with excellent business image likely to attract higher end users. Large part of site acquired by Helios Slough to provide 65,000 sqm of new industrial and warehouse floorspace.
				16.89 (allocated)	6,756	40,536	25,335	
	Red Scar Industrial Estate (17)	GU	Immediate - short	Allocation 4.53 ha	1,812	10,872	6,795	Some 22 hectares of land within the Red Scar site has been committed for employment uses. The site offers potential to meet a range of employment requirements.
				Committed (F, H and other) 21.92 ha	-	43,840	54,800	
	Millennium City Park (1)	BU	Immediate - short	3.5	1,400	8,400	5,250	This site has excellent opportunity to bring forward good quality new employment uses.
Site at Junction 31a (M6) West Loop (8)	MU	Immediate - short	4.32	1,728	15,552	-	Strategically located attractive greenfield site with potential to come forward as employment land although interest has also been expressed for Class D2 uses.	
Preston Rural	Land North of Eastway (Broughton Business Park)(15)	MU	Medium - long	24.68	24,680	44,424	37,020	Large greenfield site. Full delivery of the site is dependent on completion of the Broughton Bypass anticipated post 2010.

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Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office	Manu. B1c/B2	W & D B8	Comments
Leyland and Farington	Former Whittingham Hospital (87)	MU	Medium	3.83	9,000	-	-	Part of site has been committed for B1 office development as part of the wider redevelopment of the former hospital. Full delivery of the site is dependent on completion of a link to the proposed the Broughton Bypass although this is not anticipated until post 2010.
	Land adjoining Lancashire Business Park (AS4)	OU [GU]	Immediate - short	23.33	23,330	46,660	29,162.5	The site is within an established employment land cluster. Whilst greenfield in appearance, it is likely to have been in employment use in the past. A Green Travel Plan is likely to be required to improve its sustainability score and role in hierarchy.
	Carr Lane (AS5)	GU	Immediate - short	2.7	2,700	5,400	3,375	More than half of the site has been completed for industrial / warehouse development. The site has a positive business image and is likely to attract further employment development on the remainder of the site. The entire site has outline planning permission for B1. B2 and B8 development.
	Land within Lancashire Business Park (AS6)	OU/OS	Immediate - short	3.43 – (allocation) 14.6 (committed)	3,430	6,860 32,920	4,287.5	Allocated rectangular plot within the centre of LEBP used (informally) for open storage. Site may be owner specific (Leyland Trucks). 14.6 hectares with planning permission for a Waste Technology Park, classified as Use Class B2.
	West Paddock	GU	Medium - Long	1.94	7,760	-	-	Greenfield site but has been available without planning permission for several years. Council aspiration to develop for high quality employment use with part retained of site for open space/ leisure.
	OS2 RO Matrix Park	BU	Short - Medium	2.03 allocated 12.778 committed	8,120	-	28,394	Large, highly attractive site containing modern buildings and presenting a very good business image.
Lostock Hall, Bamber Bridge & Penwortham	South Rings (AS1)	GU	Immediate - short	5.147 (allocation) 6.03 (Committed)	19,322 24,120	-	-	The remainder of the site (6.03ha) has been allocated for B1 office development of which 3,863 sqm. is currently under construction. Remainder part of site also subject to part unimplemented planning permission which could deliver additional office development.

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Sub Area	Site	Classification	Availability	Area Available for Dev (Ha)	Office	Manu. B1c/B2	W & D B8	Comments
	Kellett Lane (AS7)	OU (GU)	Immediate - short	4.93 (allocated) 0.51 (committed)	17,680 2,040	-	-	Approximately 0.51 hectares has been committed for B1 Office use. The site is entirely greenfield with strong owner aspirations for employment use. Green Travel Plan and Sustainability Plan required to enhance sustainability score and potential role in the employment hierarchy.
	Lostock Hall Gas Works (MU2)	MU	Medium - Long	10.5 ha (assumed only 1.5 ha for employment)	900	5,000	654	Site remediated for residential led development with a 6,504 sqm. employment floorspace secured through outline planning permission.
Eastern Parishes	-	-	-	-	-	-	-	-
Western Parishes	Liverpool Road, Walmer Bridge (MU3)	MU	Immediate - short	2.79	3,720	3,720	4,650	Residential component has been completed but 2.79 ha of land allocated for employment use remaining uncommitted.

Chorley

Borough Wide

Existing Stock

- 9.23 Chorley Borough Council's area includes approximately 21% of total employment floorspace within Central Lancashire. Of this floorspace (roughly 636,000 sqm.) almost 50% is made up of manufacturing / industrial floorspace followed by warehousing / distribution (38%) and offices (13%). In terms of vacancies, there are a greater number of vacant warehousing / industrial units (52) than vacant offices (37) in Chorley. Also, the largest number of vacant offices are those that fall within the smallest size band of 0-100 sqm. whereas the highest number of vacant warehousing and industrial units are in size band 101-500sqm.

Employment Land Supply

- 9.24 Compared with South Ribble and Preston, Chorley Borough has the largest area in hectares of allocated employment land without planning permission at approximately 55 hectares. Key sites contributing to this figure include Botany / Great Knowley, Cowling Farm and Southern Commercial / Buckshaw Village.
- 9.25 In contrast, Chorley Borough has the lowest level of employment commitments on allocated sites in comparison to the other two Council areas, although the contribution from this particular component of supply is still important equating to around 21 hectares [although the relatively high level of pending loss (sites with planning permission which would result in the reduction of employment land or floorspace – also see Table 9.6) within the area does reduce the net commitment figure]. The majority of employment commitments are identified for B8 warehousing development at the Buckshaw Regional Investment Site.

Key to Tables 9.8 – 9.22 : **m²(hectares)** : floorspace/ total site area.

Table 9.8: Chorley Total – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	69,280 (17.33)	107,240 (26.81)	56,350 (11.28)
<i>Local Plan Commitments (Gains)</i>	8,793 (2.655)	35,648 (10.185)	47,707 (10.12)
<i>Other Commitments (Gains)</i>	2,395 (0.97)	998 (0.93)	1960 (0.95)
<i>Pending Losses</i>	0 (0)	-44,398 (-10.1)	0 0
Commitments (Net)	11,188 (3.625)	-7752 (1.015)	49,667 (11.07)
Other QA Sites	0 (0)	6,000 (1.50)	7,250 (1.45)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	4,296	36,486	36,488
Total (excludes vacant premises)	80,468 (20.955)	105,488 (29.325)	113,267 (23.8 }

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Total (excl vacant premises, other QA & OS Sites)	80,468 (20.955)	99,488 (27.825)	106,017 (22.35)

Chorley Central

Existing Stock

- 9.26 In excess of 75% of the Borough's total existing floorspace is located in the Central sub area. This dominance is most pronounced in the office sector accounting for 85% of the Borough's total office supply. In terms of vacant premises, at approximately 85%, Chorley Central contains by far the vast majority of Borough's currently available stock. Vacant office and industrial / manufacturing floorspace in the Central area accounts for 84% and 96% of Chorley's vacant employment floorspace respectively.

Employment Land Supply

- 9.27 Chorley Central accounts for 96% of the Borough's total potential employment land supply. Virtually all of the land contributing to the Borough-wide figure attributable Local Plan Employment Allocations without permission is in the Central sub-area. All but one of the Borough's local plan commitments are in the Chorley Central sub-area. Similarly all but one of the commitments outside of the allocated Local Plan sites are also in this sub area.
- 9.28 The sub area also has the largest area of pending employment land losses (see table 9.6 for definition), accounting for 98% of total within Chorley. This pending loss of employment land and floorspace is due almost entirely to a permitted development scheme on the approximately 10 hectare Lex Auto Logistics site at Pilling Lane.

Table 9.9: Chorley Central – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	68,680 (17.18)	105,544 (26.36)	56,350 (11.28)
<i>Local Plan Commitments (Gains)</i>	7,643 (2.18)	32,198 (8.76)	47,707 (10.12)
<i>Other Commitments (Gains)</i>	2,395 (0.97)	750 (0.56)	1,860 (0.95)
<i>Pending Losses</i>	0 (0)	-44,398 (-10.1)	0 0
Commitments (Net)	10,038 (3.15)	-11,450 (-0.78)	49,567 (11.07)
Other QA Sites	0 (0)	6,000 (1.50)	7,250 (1.45)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	4,296	35,266	35,266
Total (excludes vacant premises)	78,718 (20.33)	100,094 (27.08)	113,167 (23.8)
Total (excl vacant premises, other QA & OS Sites)	78,718 (20.33)	94,094 (25.58)	10,5917 (22.35)

Chorley East

Existing Stock

- 9.29 Chorley East has an existing employment floorspace of 134,000 sqm. which accounts for 21% of Chorley's total. Approximately 70% of this floorspace is within the manufacturing / industrial sector. Existing office floorspace in this sub area is limited, accounting for only 6% of the total floorspace.
- 9.30 At the time of the study, there were no vacant office or industrial and warehousing premises identified in Chorley East.

Employment Land Supply

- 9.31 Chorley East has a very small employment land supply of only 0.37 hectares which equates to below 1% of supply in the Borough. Additionally, no further sites have been identified through this study with capacity to provide additional employment floorspace in this sub area.

Table 9.10: Chorley East – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	0 (0)	0 (0)	0 (0)
<i>Local Plan Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	248 (0.37)	0 (0)
<i>Pending Losses</i>	0 (0)	0 (0)	0 (0)
Commitments (Net)	0 (0)	248 (0.37)	0 (0)
Other QA Sites	0 (0)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	0 (0)	0 (0)	0 (0)
Total (excludes vacant premises)	0 (0)	248 (0.37)	0 (0)
Total (excl vacant premises, other QA & OS Sites)	0 (0)	248 (0.37)	0 (0)

Chorley West

Existing Stock

- 9.32 Chorley West has the smallest amount of existing employment floorspace in any of the sub areas defined for Chorley Borough, accounting for just below 10%. Of the 62,000sqm of floorspace within this sub area, almost 40,000 sqm is in the warehousing and distribution sector. In October 2007, there were three offices and eight warehousing /industrial units vacant within the sub area, accounting for a total of 3,264 sqm. of available floorspace. No individual vacant unit was greater than 1,000sqm.

Employment Land Supply

- 9.33 Chorley West has a total employment land supply of 2.5 hectares which accounts for just over 3% of the Borough's total. The only allocated employment site without planning permission is located in Mawdesley and has an estimated potential to provide 2,400 sqm. of B1 office and industrial development.
- 9.34 The only employment commitment comprises vacant land at the Twin Lakes Industrial Estate site which is estimated could provide a floorspace of up to 4,600 sqm. for B1 and B2 development.

Table 9.11: Chorley West– Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	600 (0.15)	1,800 (0.45)	0 (0)
<i>Local Plan Commitments (Gains)</i>	1,150 (0.475)	3,450 (1.425)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	-266 (-0.2)	0 (0)
Commitments (Net)	1,150 (0.475)	3,184 (1.225)	0 (0)
Other QA Sites	0 (0)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	0	1,220	1,221
Total (excludes vacant premises)	1750 (0.625)	4,984 (1.675)	0 (0)
Total (excl vacant premises, other QA & OS Sites)	1750 (0.625)	4,984 (1.675)	0 (0)

Preston

City Wide

Existing Stock

- 9.35 The Preston City Council area provides approximately 1,320,000 sqm. of employment floorspace of which 28.5% is within the office sector, 51% in manufacturing / industrial and 20.5% in warehousing or distribution. As would be expected, the majority of offices are located within the City Centre sub area, accounting for 58% of total office floorspace within the local authority area. The Inner Area provides the largest amount of existing manufacturing and, warehouse and distribution floorspace.
- 9.36 The office vacancy rates are highest within the City Centre sub area in terms of the number of vacant premises, focussed particularly within premises of less than 500 sqm (however the Eastern Suburbs has the largest amount of vacant office floorspace, largely attributable to a number of vacancies in excess of 2,000 sqm). In terms of floorspace, the level of

vacancy for industrial and warehousing is highest in the Eastern sub area, accounting for 9,543 sqm. The Western sub area however had the largest number of vacant premises at the time of the study.

Employment Land Supply

- 9.37 When excluding Other QA and Owner Specific sites, Preston has the largest employment land supply of the three local authorities in Central Lancashire. It has a total net employment land supply of around 96 hectares, split unevenly between the three employment sectors. The smallest employment land supply is for offices which is estimated represents around 20% of the total land supply followed by manufacturing at 36% and the remaining 44% for warehousing and distribution.
- 9.38 Over half of the employment land supply is derived from allocated employment sites without planning permission with potential to deliver 55 hectares of new employment development. The largest sites contributing to this total include the Preston East Employment Area and Broughton Business Park. Excluding pending losses, approximately 46 hectares of land has also been committed for new employment development, made up largely from extant planning permissions at the Preston East Employment Area and also a number of sites at Red Scar.
- 9.39 Through qualitative assessment, the study has also identified a potential for a further 12 hectares of land which could contribute toward employment development (i.e. vacant sites assessed as part of this study which are currently not allocated or committed for employment development – see Table 4.10).

Table 9.12: Preston Total – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	44,576 (11.194)	125,944 (31.486)	75,060 (15.02)
<i>Local Plan Commitments (Gains)</i>	43,398 (7.22)	43,840 (10.96)	101,800 (26.7)
<i>Other Commitments (Gains)</i>	18,694 (1.394)	0 (0)	313.91 (0.03)
<i>Pending Losses</i>	- 984 (-0.246)	- 17987.91 (- 7.868)	0 (0)
Commitments (Net)	61,108 (8.368)	25,852.09 (3.092)	102,113.9 (26.73)
Other QA Sites	14,744 (3.622)	24,552 (6.138)	14,865 (2.973)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	39,074	11,593	11,593
Total (excludes vacant premises)	120, 428 (23.18)	176,348.09 (40.716)	192,038.9 (44.723)
Total (excl vacant premises, other QA & OS Sites)	105, 684 (19.56)	151,796.1 (34.578)	177,173.9 (41.75)

Preston City Centre

Existing Stock

- 9.40 Of Preston City Centre's total existing floorspace, approximately 2/3rds is in the office sector. At the time of the study, there were 63 vacant office premises in the City Centre (50% of the total number of offices vacant in the local authority area). However, in terms of floorspace, this accounts for only 31% of the Council's total, reflecting the relatively small size of units available in the City Centre. The level of office vacancy is likely to be significantly influenced by the often old and relatively poor quality secondary nature of existing supply, as reflected in the previous office needs assessment.
- 9.41 Manufacturing and industrial units account for just over 7% of all employment floorspace within the City Centre whereas warehouse and distribution floorspace accounts for roughly 15% of total employment floorspace within this sub area. In terms of vacant industrial and warehouse premises, 27% of Preston's total floorspace is located in the Preston City Centre sub area.

Employment Land Supply

- 9.42 Compared to other sub areas within Preston, the City Centre has a very limited amount of identified employment land supply, contributing to <1% of Preston's overall total. There are no allocated employment sites in the City Centre and supply is made up of a small number of commitments, most notably Hill Street Car Park, to be developed predominantly for high density office development.

Table 9.13: Preston City Centre – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	0 (0)	0 (0)	0 (0)
<i>Local Plan Commitments (Gains)</i>	21,774 (0.2)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	15,655 (0.717)	0 (0)	313.91 (0.03)
<i>Pending Losses</i>	-984 (-0.246)	-313.91 (-0.03)	0 (0)
Commitments (Net)	36,445 (0.671)	-313.91 (-0.03)	313.91 (0.03)
Other QA Sites	6,564 (1.641)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	17,959	4,388	4,388
Total (excludes vacant premises)	43,009 (2.312)	-313.91 (-0.03)	313.91 (0.03)
Total (excl vacant premises, other QA & OS Sites)	36,445 (0.461)	-313.91 (-0.03)	313.91 (0.03)

Preston Inner Area

Existing Stock

9.43 This sub area contains the largest proportion of Preston’s existing employment floorspace (over 40%). Of this existing floorspace, around 12% is in the office sector and the remainder is split fairly evenly between manufacturing and warehouse / distribution. Vacant industrial and warehousing premises (15 units) in this area accounts for around 23% of total vacant industrial / manufacturing floorspace in the Council area. There are also 23 vacant offices, made up of predominantly smaller units accounting for 15% of total vacant office units in Preston.

Employment Land Supply

9.44 There is only one allocated site within this sub area (Ringway / Falkland Street) and this is identified with potential for office redevelopment (Ringway / Falkland Street). The contribution of other sites with planning permission for employment development is also very limited at less than 0.2 hectares.

Table 9.14: Preston Inner Area – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	8,200 (2.1)	0 (0)	0 (0)
<i>Local Plan Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	750 (0.197)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	-3,022 (-2.79)	0 (0)
Commitments (Net)	750 (0.197)	-3,022 (-2.79)	0 (0)
Other QA Sites	0 (0)	768 (0.192)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	8,917	3,734	3,734
Total (excludes vacant premises)	8,950 (2.297)	-2,254 (-2.598)	0 (0)
Total (excl vacant premises, other QA & OS Sites)	8,950 (2.297)	-3,022 (-2.79)	0 (0)

Preston Western Suburbs

Existing Stock

9.45 Existing floorspace in the Western Suburbs is a relatively low proportion (13%) when compared to Preston as a whole. The existing stock is fairly evenly split between office, manufacturing / industrial, and warehouse / distribution. In terms of numbers of units, at the time of the study vacancy levels appear comparatively high in the sub area, accounting for just over 50% of the overall number of vacant industrial / warehouse units in Preston. However, given the small floorspace size of these units, they account for less than 19% of the Council’s overall total vacant industrial / warehousing floorspace. All the vacant industrial / warehousing units are below 1000

sqm. There are 13 vacant office premises within the sub area, most of which are in the size range of 101 and 500 sqm.

Employment Land Supply

- 9.46 It is estimated that the existing employment land supply within the Preston Western Suburbs area has the potential to provide up to 12,694sqm. of employment floorspace over 2.61 hectares of land. This is largely attributed to two sites at Preston Riversway (Site 13C and D2).
- 9.47 Through qualitative assessment, three other non allocated and uncommitted sites were identified with capacity to potentially contribute toward employment land. These sites include Riversway Phase B (9.91 hectares), Cottam Hall brickworks (0.69 hectares) and Cottam Local Centre (0.3 hectares) and collectively have potential to contribute up to 10.9 hectares of employment land toward Preston Western Suburbs supply.

Table 9.15: Preston Western Parishes – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	0 (0)	6,160 (1.54)	660 (0.14)
<i>Local Plan Commitments (Gains)</i>	5,874 (0.93)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	0 (0)	0 (0)
Commitments (Net)	5,874 (0.93)	0 (0)	0 (0)
Other QA Sites	8,180 (1.981)	23,784 (5.946)	14,865 (2.973)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	7682	3,088	3,088
Total (excludes vacant premises)	14,054 (2.911)	29,944 (7.486)	15,528 (3.113)
Total (excl vacant premises, other QA & OS Sites)	5,874 (0.93)	6,160 (1.54)	660 (0.14)

Preston Eastern Suburbs

Existing Stock

- 9.48 Around 20% of Preston’s existing employment stock is in the Eastern Suburbs. Over half of this employment stock is for Class B8 use with the smallest proportion (under 14%) for office use. There are 26 vacant office units within this sub area accounting for approximately 13% of all vacant office floorspace within the local authority. There are 13 vacant warehouse / industrial premises in the eastern suburbs, accounting for almost 30% of total vacant floorspace in Preston.

Employment Land Supply

- 9.49 A large proportion of Preston’s employment land supply (without planning permission) is located in the Eastern Suburbs sub area. For example, the uncommitted part of the Preston East Employment Area is nearly 17 ha with an estimated capacity to provide in excess of 70,000 sqm. of additional

employment floorspace. There is also already a commitment to provide in excess of 50,000 sqm. of employment land over 18 hectares at Preston East Employment Area and a further approximately 100,00 sqm. within Red Scar proposed over a number of sites which collectively, cover an area of around 22 hectares.

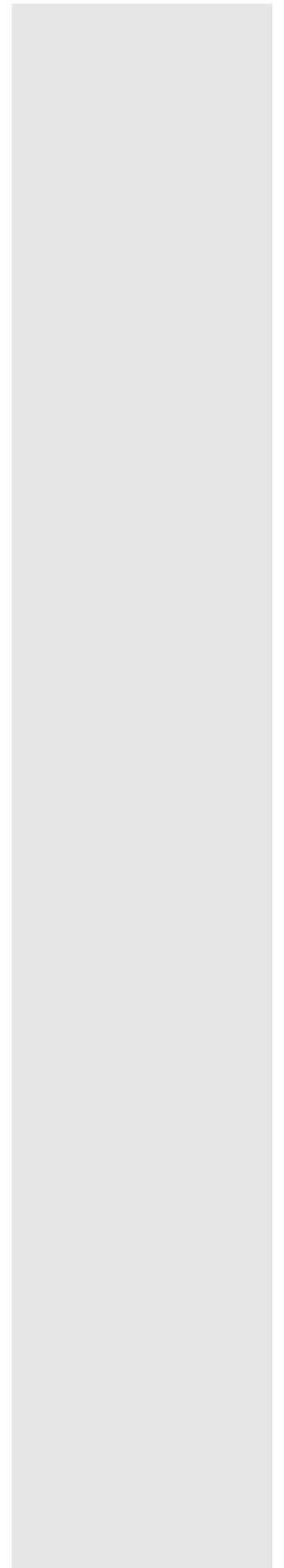


Table 9.16: Preston Eastern Parishes – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	11,696 (2.924)	75,360 (18.840)	37,380 (7.476)
<i>Local Plan Commitments (Gains)</i>	6,750 (2.26)	43,840 (10.96)	101,800 (26.7)
<i>Other Commitments (Gains)</i>	2,289 (0.48)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	-5,588 (-2.388)	0 (0)
Commitments (Net)	9,039 (2.74)	38,252 (8.572)	101,800 (26.7)
Other QA Sites	0 (0)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	22,475	4,771	4,772
Total (excludes vacant premises)	20,735 (5.664)	113,612 (27.412)	139,180 (34.176)
Total (excl vacant premises, other QA & OS Sites)	20,735 (5.664)	113,612 (27.412)	139,180 34.176

Preston Rural Area

Existing Stock

- 9.50 The Preston Rural area has the smallest existing employment floorspace in Preston, accounting for just 3% of Preston's total. The majority of existing floorspace in this sub area (65%) is in the manufacturing / industrial sector. There are no vacant offices or industrial / warehousing premises identified in this sub area.

Employment Land Supply

- 9.51 Land North of Eastway (formerly known as 'Broughton Business Park') is nearly 25 hectares and is estimated as having a potential to provide an employment floorspace of over 100,000 sqm (although in reality this sites contribution could be less as part of the land may be required to accommodate P&R proposals). In addition, a further employment commitment in the Preston Rural sub area exists on land at Whittingham Hospital (3.83 hectares) which has extant planning permission to provide 9,000 sqm. of B1 office floorspace. There is also a loss of an estimated 9,064 sqm. of Industrial floorspace at the depot site in Whittingham Lane in Broughton which has been committed for residential redevelopment.

Table 9.17: Preston Rural Area – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	24,680 (6.17)	44,424 (11.106)	37,020 (7.404)
<i>Local Plan Commitments (Gains)</i>	9,000 (3.83)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
<i>Pending Losses</i>	0 (0)	-9,064 (-2.66)	0 (0)
Commitments (Net)	9,000 (3.83)	-9,064 (-2.66)	0 (0)
Other QA Sites	0 (0)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	0	0	0
Total (excludes vacant premises)	33,680 (9.55)	35,360 (8.446)	0 (0)
Total (excl vacant premises, other QA & OS Sites)	33,680 (9.55)	35,360 (8.446)	0 (0)

South Ribble

Existing Stock

9.52 South Ribble provides 1,091,000 sqm. of existing employment floorspace, accounting for 35.8% of total employment floorspace within Central Lancashire. The majority of floorspace is within the manufacturing / industrial sector (52%), followed by warehouse / distribution which accounts for 39% of total employment floorspace within South Ribble. The majority of industrial / manufacturing and warehouse / distribution floorspace is located within two sub areas (Leyland and Farington, and Lostock Hall, Bamber Bridge and Penwortham). The Eastern and Western Parishes provide the least amount of employment floorspace.

9.53 Employment vacancies are focused in Leyland and Farington as well as in Lostock, Bamber Bridge and Penwortham (with only two vacancies falling outside of these sub areas). 47 vacant office units were identified which account for almost 40,000sqm. of vacant floorspace, (representing a total of 46.8% of total vacant office floorspace within Central Lancashire). This is mainly attributed to a large single office vacancy of 27,870 sqm. within the Lostock Hall, Bamber Bridge and Penwortham sub area. Leyland & Farington has the highest quantity of vacant industrial and warehousing floorspace as well as the number of vacant premises in South Ribble, accounting for 56% of total vacant floorspace within the Borough.

Employment Land Supply

9.54 There is 44.3 hectares of uncommitted allocated employment land within South Ribble which is estimated has the potential to provide approximately 185,000 sqm. of employment floorspace. Land adjacent to LEBP makes a significant contribution to this total, providing in excess of 23 hectares. In addition, a further approximately 38 hectares has planning permission for employment development, the majority of which is located within identified employment allocations, with land RO Matrix Park and land at LEBP making the largest contribution to this total.

9.55 Approximately 154 hectares is also identified as future Owner Specific opportunities. This very high total is largely attributable to land at Samlesbury Aerodrome which is likely to come forward for aviation related employment development.

Table 9.18: South Ribble Total – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	81,244 (20.6275)	60,572 (15.18225)	42,265 (8.49225)
<i>Local Plan Commitments (Gains)</i>	28,860 (7.215)	38,320 (15.45)	31,769 (13.445)
<i>Other Commitments (Gains)</i>	3,319 (0.9)	4,000 (1)	1,654 (0.3)
<i>Pending Losses</i>	0 (0)	-710 (-0.15)	-1,509 (-0.251)
Commitments (Net)	32,179 (8.115)	41,610 (16.3)	31,914 (13.494)
Other QA Sites	8,964 (2.241)	8,964 (2.241)	11,205 (2.241)
Owner Specific Sites	154,260 (38.565)	308,520 (77.13)	192,825 (38.565)
Vacant Premises	11,878	34,908	34,908
Total (excludes vacant premises)	276,647 (69.5485)	419,666 (110.8533)	278,209 (62.79225)
Total (excl vacant premises, other QA & OS Sites)	113,423 (28.7425)	102,182 (31.48225)	74,179 (21.98625)

Eastern Parishes

Existing Stock

- 9.56 Only 6% of South Ribble’s existing employment floorspace is located in the Eastern Parishes. Over 60% of this is in the manufacturing / industrial sector and less than 5% are offices, with the remaining 35% in the warehouse / distribution sector. No vacant premises were identified in the sub area through the study.

Employment Land Supply

- 9.57 There are no allocated employment sites in the Eastern Parishes. Salmesbury Aerodrome represents an extremely large possible future employment opportunity but is identified as being Owner Specific and as such, will only contribute to land supply once any employment development obtains planning permission.

Table 9.19: South Ribble Eastern Parishes – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	0 (0)	0 (0)	0 (0)
<i>Local Plan Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	0 (0)	0 (0)
Commitments (Net)	0 (0)	0 (0)	0 (0)
Other QA Sites	0	0	0

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
	(0)	(0)	(0)
Owner Specific Sites	142,960 (35.74)	285,920 (71.48)	178,700 (35.74)
Vacant Premises	0	0	0
Total (excludes vacant premises)	142,960 (35.74)	285,920 (71.48)	178,700 (35.74)
Total (excl vacant premises, other QA & OS Sites)	0 (0)	0 (0)	0 (0)

Western Parishes

Existing Stock

- 9.58 Only 5.4% of South Ribble's existing employment floorspace is in the Western Parishes. Nearly half of this is used as offices. No vacant offices were revealed in this sub area as part of the study and only one vacant industrial / manufacturing unit of 251 sqm was identified.

Employment Land Supply

- 9.59 There are no allocated sites without planning permission in Western Parishes. Additionally, there are no employment commitments outside of the allocated sites. However an unallocated and uncommitted mixed-use development site at Liverpool Road in Walmer Bridge has been assessed through the study with a potential capacity to provide approximately 12,000 sqm. of B1 office, industrial and B8 warehousing development over 2.79 hectares.

Table 9.20: South Ribble Western Parishes – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	0 (0)	0 (0)	0 (0)
<i>Local Plan Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	0 (0)	0 (0)
Commitments (Net)	0 (0)	0 (0)	0 (0)
Other QA Sites	3,720 (0.93)	3,720 (0.93)	4,650 (0.93)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	0	125	126
Total (excludes vacant premises)	3,720 (0.93)	3,720 (0.93)	4,650 (0.93)
Total (excl vacant premises, other QA & OS Sites)	0 (0)	0 (0)	0 (0)

Leyland & Farington

Existing Stock

9.60 Existing employment floorspace in Leyland and Farington accounts for over 40% of the Borough's total. The majority of existing employment land is in the manufacturing / industrial sector (67%) with relatively little in office use (11.2%). Only 14% of South Ribble's vacant offices were identified as being located in Leyland and Farington. The majority of these are smaller offices of 100 sqm. or below. However, almost 63% of South Ribble industrial and warehouse vacancies were located in this sub area at the time of assessment.

Employment Land Supply

9.61 There is approximately 30 hectares of allocated and uncommitted employment land within Leyland and Farington, predominantly attributable to land adjoining LEBP. A number of allocated employment sites also have extant planning permission to provide a further approximately 30 hectares of employment land. Land within Lancashire Business Park is the largest of these commitments (with planning permission for a waste technology centre), followed closely by land RO Matrix Park. In addition, 11.3 hectares is allocated employment land that is likely to come forward for Owner Specific employment development but has not yet been committed.

Table 9.21: South Ribble: Leyland & Farington – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	42,640 (10.66)	53,520 (13.38)	33,450 (6.69)
<i>Local Plan Commitments (Gains)</i>	2,700 (0.675)	38,320 (15.45)	31,769 (13.445)
<i>Other Commitments (Gains)</i>	0 (0)	0 (0)	0 (0)
<i>Pending Losses</i>	0 (0)	0 (0)	0 (0)
Commitments (Net)	2700 (0.675)	38,320 (15.45)	31,769 (13.445)
Other QA Sites	5,244 (1.311)	5,244 (1.311)	6,555 (1.311)
Owner Specific Sites	11,300 (2.825)	22,600 (5.65)	14,125 (2.825)
Vacant Premises	5,534	21,866	21,867
Total (excludes vacant premises)	61,884 (15,471)	119,684 (35.791)	85,899 (24.271)
Total (excl vacant premises, other QA & OS Sites)	45,340 (11,335)	91,840 (28.83)	65,219 (20.135)

Lostock Hall, Bamber Bridge & Penwortham

Existing Stock

9.62 Of the four South Ribble sub areas, Lostock Hall, Bamber Bridge and Penwortham has the largest existing employment floorspace accounting for 45% of South Ribble's total. The manufacturing / industrial and warehousing / distribution sectors are dominant in this sub area accounting for 47% and 49% of total employment floorspace (within the sub area) respectively. Less than 5% of this floorspace is in office use. A very large proportion of vacant office floorspace in South Ribble is located within this sub area (86%) and approximately 35% of vacant industrial / warehousing floorspace within the Borough is in this sub area, with approximately 50% of vacant industrial / warehousing units with a floorspace area of 500 sqm. or less.

Employment Land Supply

9.63 There are four allocated but uncommitted employment sites within the sub area providing approximately 10 hectares of land for employment development. Planning permission also exists to provide around 26,000 sqm of new office floorspace on identified employment sites, most notably at South Rings. A further 2.2 hectares of employment land has been committed on unallocated sites to provide mainly for B1 (office) uses.

Table 9.22: South Ribble: Lostock Hall, Bamber Bridge & Penwortham – Supply Overview

Supply Component	Office (B1a) m ² (hectares)	Manu. (B1b,c & B2) m ² (hectares)	Warehousing (B8) m ² (hectares)
Employment Allocations	38,604 (9.9675)	7,052 (1.80225)	8,815 (1.80225)
<i>Local Plan Commitments (Gains)</i>	26,160 (6.54)	0 (0)	0 (0)
<i>Other Commitments (Gains)</i>	3,319 (0.9)	4,000 (1)	1,654 (0.3)
<i>Pending Losses</i>	0 (0)	-710 (-0.15)	-1,509 (-0.251)
Commitments (Net)	29,479 (7.44)	3,290 (0.85)	145 (0.049)
Other QA Sites	0 (0)	0 (0)	0 (0)
Owner Specific Sites	0 (0)	0 (0)	0 (0)
Vacant Premises	6,344	12,115	12,115
Total (excludes vacant premises)	68,083 (17,4075)	10,342 (2.65225)	8,960 (1.85125)
Total (excl vacant premises, other QA & OS Sites)	68,083 (17,4075)	10,342 (2.65225)	8,960 (1.85125)

Conclusions and Recommendations

Headline Conclusions

- 9.64 Drawing together details in **Tables 9.8 – 9.22** enables a total table to be derived to illustrate supply for the Central Lancashire Area and individually for Chorley, Preston and South Ribble areas compared against forecast requirements. Totals against employment forecasts are reproduced in **Tables 9.24 – 9.27** below.
- 9.65 The overarching headline conclusions are:
- Overall, there is very generous quantity of employment land supply within the Central Lancashire Area (and within the three constituent local authority areas) when compared against forecast requirements using small area forecasting techniques. This is particularly evident for manufacturing which as a sector is predicted to decline.
 - Projecting past completion rates forward provides a different picture of requirements however. In particular, using this approach suggests a current shortfall in employment land supply for each local authority and hence, for the Central Lancashire Area as a whole, over the period up to 2021;
 - With the exception of one or two identified specific Other Urban sites, unless committed for other forms of development we would not recommend releasing or de-allocating any employment sites ranked as Best Urban, Good Urban or Other Urban at this time through the Development Plan process. There is scope however to release the poorest performing sites from the employment portfolio (i.e. those ranked as 'Other'); and
 - Each local authority area has a reasonable portfolio of employment land supply in terms of amount, range and type although supply is not always evenly distributed and there is a need to identify additional / enhance employment supply in certain parts of Preston and also in other parts of the Central Lancashire Area (including office opportunities in central urban areas and opportunities more generally in certain market towns and rural areas) to provide a better spatial distribution of opportunities. Increasing supply in such areas and addressing issues to promote the delivery of existing employment sites should be a key focus.

Quantitative Supply Versus Forecast Requirements

- 9.66 A snapshot illustrating this generous quantitative supply position compared against forecast growth / decline (in hectares) up to 2021 is shown in **Table 9.23** below. A more detailed breakdown of the main components of supply for the Central Lancashire Area and for each of the three local authority areas is included in **Tables 9.24 – 9.27**.

Table 9.23: Headline Overview of Land Supply Versus Forecast Requirements to 2021

	Base Forecast Growth / Decline to 2021	Total Net Employment Land Supply	Difference
<i>Chorley</i>	3.1 ha	71.13 ha	68.03 ha
<i>Preston</i>	-15.5 ha	95.9 ha	111.4 ha
<i>South Ribble</i>	-41.4 ha	82.2 ha	123.61ha
CLA Total	-53.8 ha	249.24ha	303 ha

- 9.67 Within Table 9.23, the 'Forecast Growth / Decline to 2021' is based on the small area forecast model (base forecast) included in Tables 9.1 to 9.4 and also reproduced in Tables 9.24 to 9.27 below (shown in bold in these tables). This figure represents the forecast change in the amount of land occupied for all B class employment uses between now (taken as 2007) and 2021.
- 9.68 The 'Total Net Employment Land Supply' column provides the total net amount of land currently contributing to future supply, in the form of employment commitments or employment allocation. Figures in this column reproduces information in Tables 9.24 to 9.27 (also shown in bold in these tables). The 'Difference' column is simply total net employment land supply less forecast growth / decline.

Table 9.24: Central Lancashire Total Supply versus Forecast Requirements to 2021

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Gross Total Employment Land Supply (1)	113.69ha	180.89 ha	131.31 ha	425.9 ha
B. Net Total Employment Land Supply (1)	69.25ha	93.88ha	86.09ha	249.2 ha
C. Base Forecast Requirement 2007 – 2021 (2)	16.9ha	-95.7 ha	25ha	-53.8 ha
Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C)	96.79ha	276.59 ha	106.31 ha	479.69 ha
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	52.35ha	189.58 ha	61.09 ha	303 ha

(1) Figures total corresponding rows in Tables 9.25 to 9.27

(2) Figures extracted from Table 9.1 (base forecast)

Table 9.25: Chorley Total Supply versus Forecast Requirements to 2021

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Gross Total Employment Land Supply (1)	20.955 ha	29.325ha	23.8ha	74.08ha
B. Net Total Employment Land Supply (1)	20.955 ha	27.825ha	22.35ha	71.13 ha
C. Base Forecast Requirement 2007 – 2021 (2)	4.3 ha	- 5.1 ha	3.9 ha	3.1 ha
Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C)	16.665 ha	34.425ha	19.9 ha	70.98ha
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	16.665 ha	32.925	18.45ha	68.03 ha

(1) Figures extracted from corresponding rows in Table 9.8

(2) Figures extracted from Table 9.2 (base forecast)

Table 9.26: Preston Total Supply versus Forecast Requirements to 2021

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Gross Total Employment Land Supply (1)	23.18 ha	40.716 ha	44.723 ha	108.6ha
B. Net Total Employment Land Supply (1)	19.55 ha	34.578 ha	41.75 ha	95.9ha
C. Base Forecast Requirement 2007 – 2021 (2)	7.5 ha	- 36.6 ha	13.6 ha	-15.5 ha
Surplus or Deficit (based on	15.68 ha	77.316 ha	31.123 ha	124.12ha

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
Gross Total ELS) (i.e. A minus C)				
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	12.05 ha	71.178 ha	28.15 ha	111.4 ha

(1) Figures extracted from corresponding rows in Table 9.12

(2) Figures extracted from Table 9.3 (base forecast)

Table 9.27: South Ribble Total Supply versus Forecast Requirements to 2021

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Gross Total Employment Land Supply (1)	69.55 ha	110.85 ha	62.79 ha	243.19ha
B. Net Total Employment Land Supply (1)	28.74 ha	31.48 ha	21.99 ha	82.21 ha
C. Base Forecast Requirement 2007 – 2021 (2)	5.1 ha	- 54 ha	7.5 ha	-41.4 ha
Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C)	64.45 ha	164.85 ha	55.29 ha	284.59ha
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	23.64 ha	85.48 ha	14.49 ha	123.61 ha

Note – the significant difference between gross and net land supply is predominantly due to the inclusion of Samesbury Aerodrome (142.96 ha) within the gross land supply total

(1) Figures extracted from corresponding rows in Table 9.18

(2) Figures extracted from Table 9.4 (base forecast)

- 9.69 The snapshot of quantitative supply included in the above tables does not however, take into account the qualitative or locational aspects of provision. Also, as noted previously, forecast figures should be seen as the absolute minimum amount of land needed to accommodate future forecast change in each of the main sectors of employment. These amounts therefore do not reflect the need to provide for choice in the employment portfolio. This includes ensuring that an adequate range of opportunities are provided for the growth of indigenous firms and for other new employment development and inward investment, including start-ups and SME's.
- 9.70 It is important to plan for new manufacturing development even though as a sector it is forecast to decline. Given the nature of the area's economy, manufacturing will continue to play an important role in the area. For example, there have been recent planning permissions and applications for B2 development on sites such as 'The Revolution' (the Regional Investment Site). Also, decline will likely vary across the study area and it will still be important to maintain an appropriate supply of land to accommodate change in industrial requirements and new development.
- 9.71 It is fair to conclude however that, notwithstanding qualitative considerations, given the very high level of supply when compared to forecast change, there is justification to consider the release of the poorest performing sites from the employment portfolio. This matter, and other qualitative issues, are considered in further detail in subsequent paragraphs.
- 9.72 Over the period, the office and warehousing sector is generally forecast to grow in the Central Lancashire Area and within each local authority area. Forecast office growth is most pronounced for Preston (with the high forecast identifying a requirement for an additional 11 hectares over the period). Qualitative and quantitative issues, including a lack of identified sites in Preston City Centre / Inner Area and the generally poor quality of a large proportion of the existing office stock may limit the ability to robustly

meet forecast requirements. The delivery of emerging proposals for the CBD will therefore be important in this regard.

- 9.73 The continued availability of sites with good access to the motorway network will likely continue to be an important element of the employment portfolio to accommodate the forecast growth in the warehousing and distribution sector over the period to 2021.
- 9.74 As a general point, which is applicable to all three of the local authority areas covered by this study, qualitative issues do (to varying degrees) apply to certain sites which will restrict the overall choice and availability of land for development. Consideration therefore needs to be given to addressing qualitative issues to enhance the attractiveness and deliverability of current supply in order to maximise choice and hence, the potential for realising economic development objectives.
- 9.75 Through the implementation of certain recommendations set out later in this chapter, there is potential to elevate the ranking and availability of certain sites and hence, improve their contribution and role within the employment hierarchy.

Employment Land Provision Requirements Based on the Draft Regional Spatial Strategy

- 9.76 Table 6.1 set out in the Secretary of State's proposed changes to the draft Regional Spatial Strategy includes a figure for the provision of employment land for Lancashire as a whole. This is essentially based on projecting past completion rates forward, together with an additional allowance for increases in take up and choice, to derive an employment land requirement figure.
- 9.77 Relevant information is reproduced in the following table, together with our estimate of requirements for the Central Lancashire Area and the three local authorities applying a similar approach to that adopted for Lancashire.

Table 9.27(a): Employment Land Provision Based on the Draft RSS Approach

	Lancashire	Central Lancashire Area	Chorley	Preston	South Ribble
2005 Supply (1)	1069	248 ha	70 ha	96 ha	82 ha
Current take up per annum (2)	68 ha	17 ha	4.5 ha	6.7 ha	5.8 ha
Projected inc in take up	4.25%	4.25%	4.25%	4.25%	4.25%
Projected take up per annum	71 ha	17.7 ha	4.7 ha	7 ha	6 ha
Flexibility Factor	20%	20%	20%	20%	20%
Need 2005 – 2021	1349 ha	336 ha	89 ha	133 ha	114 ha
Extra allocation required	280 ha	90 ha	19 ha	39 ha	32 ha

(1) Figures for CLA and Constituent Authorities taken from Table 9.23 in this chapter.

(2) Figures for CLA and Constituent Authorities are gross completion rates taken from Chart 4.1 in Chapter 4.

- 9.78 It should be noted that the above figures for the Central Lancashire Area and the three constituent authorities are provided only as a proxy guide. In accordance with emerging RSS policy, the distribution of land supply within

different sub-regions will need to be agreed between Local Authorities and other partners, and that this process is to be facilitated by the North West Regional Assembly. Also, completion rates included in the Table for Chorley, Preston and South Ribble (extracted from relevant annual monitoring reports) are understood to be gross average completion rates. As such, the average annual net change in employment land could be less when also considering losses to other uses.

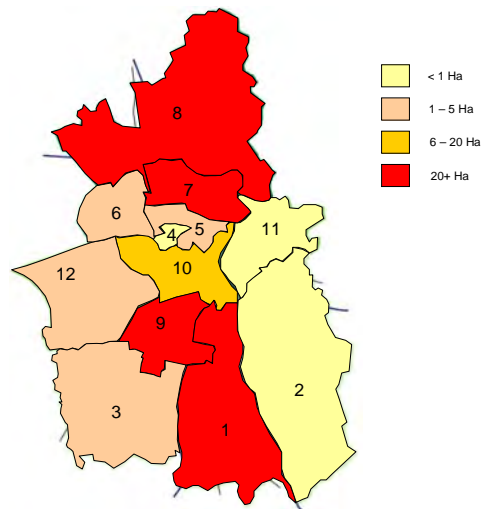
- 9.79 Accepting these caveats, the employment land requirements obtained using the approach set out in the draft RSS delivers significantly different results than using the small area forecasting model, which is based on modelling future change in the economy rather than projecting forward past take up rates of employment land.
- 9.80 This underlines the need to apply the outputs of the small area forecasting model as an absolute minimum land requirement and that in reality, a much larger amount of land will be required to ensure continuing economic development and an adequate portfolio of sites, particularly if past (gross) development rates are to continue in the future. It also illustrates the difficulty in providing an exact figure for future employment land requirements. Based on the above table however, outputs suggest that over the entire period up to 2021, there would be a need to increase total (net) supply. It will therefore be important to undertake periodic reviews of the quality and quantity of the employment portfolio in line with recommendations on monitoring set out later in this chapter.

Qualitative and Spatial Aspects of Supply

- 9.81 In order to provide a broad indication of the distribution and qualitative nature of supply within the three authority areas, **Tables 9.28 to 9.30** sets out an overview of the classification (i.e. ranking) and assessment of availability of key commitments and allocations (i.e. those sites included within Table 9.7) by study sub area. Utilising information in Tables 28 – 30, **Plan 9.2** illustrates spatially the current broad distribution of land supply across the Central Lancashire Area as a whole.

Central Lancashire Area

Plan 9.2: Broad Spatial Distribution of Supply Across the Central Lancashire Area



9.82 There is a wide spatial variation in the quantum of employment land supply across the Central Lancashire Area, with the most significant concentrations to be found within the sub areas of Chorley Central, Leyland and Farrington, Preston Eastern Suburbs and the Preston Rural Area. Conversely, there are several sub areas with less than 5 hectares of currently identified vacant employment land opportunities, with the Chorley West, Preston City Centre and South Ribble Eastern Parishes sub areas having less than 1 hectare of supply.

9.83 The main concentrations of supply are often located around the strategic motorway network, which is shown on Plan 9.1 earlier in this chapter. There is also often a broad spatial correlation between supply and the main centres of population within the sub area although this is not always the case with relatively low levels of supply in a number of central and strategically accessible locations within Preston for example (although this position will be improved through the implementation of emerging proposals for the CBD in the City Centre and with the identification of Preston Riversway Phase B as a 'Good Urban' future employment opportunity).

Chorley

9.84 A large amount of available land within Chorley is identified as being within either the Best Urban or Good Urban category, and much of this is likely to be available for development immediately or over the short term.

9.85 This being said, certain sites within Chorley's employment land portfolio are constrained in terms of their availability and / or role in the employment hierarchy (i.e. classification). Also, virtually all of Chorley's supply is located in the central sub area, which reflects the centre of population and main urban areas. As such, there is very little identified supply elsewhere in the Borough. Given the good level of existing supply in the Chorley Central sub area, there is scope to release certain undeveloped 'Other Urban' employment sites from the hierarchy. In particular, we would suggest that Cowling Farm could be de-allocated without unacceptably impacting on overall supply in this sub area.

Table 9.28: Overview of Land Availability in Chorley by Classification and Sub-Area (Sub Areas 1, 2 and 3 on Plan 9.2)

Classification	Availability	Area Available for Development (Hectares)		
		Chorley Central (1)	Chorley East (2)	Chorley West (3)
Best Urban	Immediate – Short	36.94		
	Medium - Long			
Good Urban	Immediate – Short	9.12		
	Medium - Long	16.6		
Other Urban & Mixed Use	Immediate – Short	2.31		2.5
	Medium - Long	13.35		
Other	Immediate – Short			
	Medium - Long	0.44		

Preston

9.86 Like Chorley, a significant amount of Preston’s employment land supply is either ‘Best Urban’ or ‘Good Urban’ and potentially available over an immediate or short timeframe. Supply is however very focussed within the Preston East suburbs sub area, with a very limited supply in the City Centre, Inner Area or Western Suburbs. By comparison, a more generous supply exists in the rural area but this is restricted in terms of classification and potential availability. In particular, much of the supply in the Preston Rural area is limited to a single site [Land North of Eastway (formerly referred to as Broughton Business Park)] and this is located within the southern part of the sub area remote from its more outlying settlements. Also, part of this site will likely be required for a park and ride facility thus, reducing the amount of land potentially available for employment use.

Table 9.29: Overview of Land Availability in Preston by Classification and Sub-Area (Sub Areas 4, 5, 6, 7 and 8 on Plan 9.2)

Classification	Availability	Area Available for Development (Hectares)				
		Preston City Centre (4)	Preston Inner Area (5)	Preston Western Suburbs (6)	Preston Eastern Suburbs (7)	Preston Rural (8)
Best Urban	Immediate – Short				38.39	
	Medium - Long					
Good Urban	Immediate – Short			1.37	30.77	
	Medium - Long					
Other Urban & Mixed Use	Immediate – Short	0.20	3.34			
	Medium - Long					28.51
Other	Immediate – Short					
	Medium - Long					

South Ribble

- 9.87 Within South Ribble, the majority of employment land supply is found within the Leyland and Farington sub area. Although most of this supply is identified as being available in the immediate – short term, a large proportion is defined as being ‘Other Urban’.
- 9.88 There appears to be a reasonable supply of employment land in the Lostock Hall, Bamber Bridge and Penwortham sub area but the quantity and quality of supply in the rural areas is more limited by comparison.

Table 9.30: Overview of Land Availability in South Ribble by Classification and Sub-Area (Sub Areas 9, 10, 11 and 12 on Plan 9.2)

Classification	Availability	Area Available for Development (Hectares)			
		Eastern Parishes (11)	Western Parishes (12)	Leyland & Farington (9)	Lostock Hall, Bamber Bridge and Penwortham (10)
Best Urban	Immediate – Short			14.808	
	Medium - Long				
Good Urban	Immediate – Short		2.79	2.7	11.117
	Medium - Long			1.94	
Other Urban & Mixed Use	Immediate – Short			41.36	5.44
	Medium - Long				1.5
Other	Immediate – Short				
	Medium - Long				

Recommendations

9.89 Our recommendations relate in particular to:

- A: Addressing Obstacles to the Development of Employment Sites
- B: Key allocated sites and major commitments where specific issues should be addressed to enhance their attractiveness, sustainability and availability;
- C: The level of protection to be given to the different sites specifically assessed as part of this study in terms of their role within the employment hierarchy;
- D: Vacancies and the Availability of Types and Mix of Premises;
- E: Rural Areas and Market Towns;
- F: Local Planning Policy and Other Responses; and
- G: Future Monitoring.

A: Addressing Obstacles to the Development of Employment Sites

9.90 Through this study a number of issues and obstacles have been identified which, in one way or another, constrain the deliverability of sites within the area's employment land portfolio. The extent to which these issues affect different sites vary from case to case. As a generic guide however, **Table 9.31** summarises some of the key constraints which have been identified as obstacles to the development of employment sites and the economy in general, together with a summary of possible actions which are also expanded upon / listed elsewhere in the report.

Table 9.31: Overview of Main Obstacles to Development and Suggested Responses

Issue	General Response
Limited availability of sites / premises for new and small businesses (as identified through the business survey)	<ul style="list-style-type: none"> • Use of policy approaches, including: <ul style="list-style-type: none"> ○ AAPs, SPDs and Masterplans on larger sites to seek to ensure range of available plots and premises, including for small businesses; ○ Provision for additional employment opportunities in those parts of the Central Lancashire Area where supply of land and premises is currently restricted in quantitative and / or qualitative terms. This should include LDF policies to promote rural businesses and small scale employment opportunities in and around Market Towns and other settlements; and ○ Identification of site-specific measures to enhance the availability and attractiveness of existing sites within the employment portfolio. • Influence through Economic Development and related strategies.
Qualitative supply constraints applying to vacant premises	
Competition from neighbouring areas (anecdotal evidence from the business survey)	

Issue	General Response
Pressure for non-employment use such as residential	<ul style="list-style-type: none"> • Inclusion of policies in the LDF to prevent the inappropriate erosion of better-performing sites to other non-employment (generating) uses.
Ownership and physical site constraints (such as access, ground conditions etc)	<ul style="list-style-type: none"> • Proactive approach by the Local Planning Authority to promote a comprehensive and co-ordinated approach to development through for example: <ul style="list-style-type: none"> ○ Undertaking negotiations with land owners; ○ Preparing AAPs, SPDs and Master Plans; ○ Use of SPZs, LDOs and CPOs); and ○ Promoting involvement of English Partnerships and the NWDA as appropriate.
Generally poor quality sites and buildings which make a limited contribution to the local employment portfolio	<ul style="list-style-type: none"> • Promotion of mixed use (re)development where this is a viable and effective means of enhancing a site's qualitative contribution to local townscape and employment land supply; • For the poorest quality employment sites, consider (re)development to alternative uses and relocation of any displaced occupiers; and • Application of a criteria-based LDF policy / associated SPD to guide decisions concerning the release of employment sites, including individual premises outside of employment allocations and established employment estates / areas.
Policy Constraints restricting the delivery of Class B1a office development on peripheral employment sites in Preston	<ul style="list-style-type: none"> • There is a limited supply of opportunities for new office development in Preston City Centre and also in other town centres within the study area. A balanced approach is recommended to promote office development across the study area in response to identified demand through: <ul style="list-style-type: none"> ○ Increasing the supply of opportunities for new office development in urban centres, notably in Chorley and Preston (for Preston, this position will be enhanced through the implementation of proposals for the CBD); and ○ Adoption of a policy which only allows 'standalone' office development at appropriate locations outside of City / town centres where it can be shown that alternative sequentially preferable sites are not available and where development would not impact on the delivery of major regeneration proposals for the CBD.
Sustainability and environmental constraints	<ul style="list-style-type: none"> • Preparation of a Sustainability Plan and Green Travel Plan to guide future development; and • Preparing AAPs, SPDs and Masterplans to guide site development to address sustainability and (site-specific) environmental issues.

9.91 For a number of the larger sites within the Central Lancashire Area portfolio, particularly those which are peripherally located away from central urban areas, and / or greenfield in nature, the preparation of a Sustainability Plan and Green Travel Plan to guide future development will assist in improving their environmental sustainability performance. Possible components of such Plans can be summarised as follows:

Sustainability Plan

9.92 A Sustainability Plan can be used to guide the design, construction and management of new development at key employment sites. A possible approach could be to seek to work towards ‘One Planet Living’ or carbon neutral initiatives, such as those listed in the following table.

Table 9.32: Sustainable Plan: Principles and Targets

Challenge	Principle	Goal and Strategy
Climate Change	Zero Carbon	Achieve net CO ₂ emissions of zero
Waste disposal	Zero Waste	Eliminate waste flows to landfill for incineration
Travel by car	Sustainable Transport	Reduce reliance on private vehicles and achieve major reductions of CO ₂ emissions from transport
Exploitation of resources	Local and Sustainable Materials	Transform materials supply to the point where it has a net positive impact on the environment and local economy.
Industrial agricultural processes and consumption of non-local food	Local and Sustainable Food	Transform food supply to the point where it has a net positive impact on the environment, local economy and peoples’ well being
Pollution of fresh water: depletion of water stocks	Sustainable Water	Achieve a positive impact on local water resources and supply
Loss of biodiversity and habitats	Natural habitats and Wildlife	Regenerate degraded environments and halt biodiversity loss
Loss of cultural heritage and local identity due to globalisation	Culture and Heritage	Protect and build on local cultural heritage and diversity
Fair trade	Equity and Fair Trade	Ensure that the impact on other communities is positive
Well being and contentment	Health and Happiness	Increase health and quality of life of OPL community members and others

Green Travel Plan

9.93 There is no standard format or content for Travel Plans / Green Travel Plans although their purpose (as set out in Government policy) is to seek to deliver sustainable transport objectives, including:

- Reductions in car usage (particularly single occupancy journeys) and increased use of public transport, walking and cycling;
- Reduced traffic speeds and improved road safety and personal security particularly for pedestrians and cyclists; and
- More environmentally friendly delivery and freight movements, including home delivery services.

9.94 From a review of travel plans applying to major commercial developments, a number of key steps or actions can be identified which could be applied to relevant employment opportunities:

Table 9.33: Overview of Main Green Travel Plan Initiatives

Action	Commentary
Designated Travel Plan Co-ordinator	<ul style="list-style-type: none"> Permanent member of staff to take overall responsibility for co-ordinating and implementing the GTP, acting as a key focal point for employers, employees, the local authority and transport providers.
Monitoring	<ul style="list-style-type: none"> Periodic staff surveys to ascertain changes in travel behaviour, modal shift and to help define any necessary modifications to the GTP.
Bus and Rail Services	<ul style="list-style-type: none"> Examine the viability / implement improvements to public transport services to and from the site
Promotion of Cycling and Walking	<ul style="list-style-type: none"> Provision of facilities for cyclists as part of development (secure cycle storage, showering and changing facilities, cycle network improvements); and Provision of pedestrian facilities as part of development (segregated footways and pedestrian crossings, convenient routes and maintenance to a high standard to create a safe and attractive pedestrian environment).
Travel Awareness Programme	<ul style="list-style-type: none"> Promotion, management and co-ordination of information to allow employees (and possibly extended to others resident in the local area) to make informed travel choices.
Other Incentives and Measures to Reduce Car Trips	<ul style="list-style-type: none"> Establishment of a car sharing database; Promotion of flexible working (e.g. working from home and / or variable start and finish times); and Preferential car parking spaces for car sharers and other benefits for encouraging staff to give up car parking spaces.

B: Key Allocated Sites and Major Commitments

9.95 The following paragraphs discuss key allocated sites and major commitments where specific issues should be addressed to enhance their attractiveness, sustainability or availability. Details should also be read in conjunction with information included in Chapter 5, including in relation to commentary on other sites not discussed below.

Chorley

Botany / Great Knowley

9.96 The site is in close proximity to Junction 8 of the M61 motorway. Access into the site is likely to be available from an adjacent roundabout. It is understood that the site is in multiple non-Council ownership but that there is no consensus amongst the owners in terms of their aspirations for this

site. Bringing together the various land owners on a voluntary basis will be very difficult to achieve. The Council has however adopted a Guiding Principles document to assist those wanting to develop the site.

- 9.97 The site is ranked as 'Good Urban'. Several constraints exist on site including TPOs over part of the site, drainage, site topography and strategic landscaping requirements. However, the site is sufficiently large to offer a reasonable range of plot sizes and layouts.
- 9.98 Given the nature of the opportunity, we would recommend the preparation of a Green Travel Plan and Sustainability Plan. Also, a comprehensive approach towards development may also be necessary to address constraints and bring the site forward in a co-ordinated manner.

M61 / Botany

- 9.99 This site is ranked as 'Good Urban' and has extant planning permissions for employment development. As with the Botany / Great Knowley site, given its location and nature, should the current planning permissions expire we would recommend the preparation of a Green Travel Plan and Sustainability Plan to support development of the M61 / Botany allocation.

Cowling Farm

- 9.100 Despite its strategic location close to the M61 motorway, there is no immediate access to it. Other issues, notably the site's undulating topography and poor access are major constraints which will need to be addressed to promote the delivery of this site and enhance its contribution to the employment portfolio.
- 9.101 Overall, the site is ranked as 'Other Urban' and given the level of supply in the Chorley central sub area, consideration could be given to the de-allocation of this site.

Red Bank, Carr Lane (Duxbury Business Park)

- 9.102 The site is currently a car park for the closed Chorley Convention Centre. In addition this site was recently being used by Birse Civils as a Site Office and for storing construction materials on a temporary basis in connection with construction of the Eaves Green link road. The link road junction has now been provided to serve the site. The site is ranked as 'Good Urban'.
- 9.103 Existing TPOs on site, together with adjacent new housing development and environmental designations means that a high standard of landscaping and design should be sought where possible in order to maintain and enhance the site's contribution to local environmental quality and minimise impacts on neighbouring uses.

Southport Road

- 9.104 This site is owned by Lancashire County Council and is allocated for business / industrial use (classes B1 and A2) and also for Further Higher Education facilities. Part of the site is also identified as a Biological Heritage Site and certain site features, such as boundary hedges and mature trees, will likely need to be safeguarded as part of development.
- 9.105 The site is ranked as 'Good Urban'. A proactive approach by the Council will likely be required to drive the opportunity forward, given that it has remained undeveloped for a number of years despite appearing relatively free from constraints. As with the Red Bank, Carr Lane site, a high standard of landscaping and design should be sought where possible in order to maintain and enhance the site's contribution to local environmental quality.

Group 1 (Buckshaw), Southern Commercial / Buckshaw Village (Central Business Area), Regional Investment Site (Buckshaw)

- 9.106 The Southern Commercial / Buckshaw Village site and the Regional Investment Site are located on land which formed part of the former Royal Ordnance Factory. Both of these strategically important sites are ranked as being 'Best Urban'. For marketing purposes, The Regional Investment Site has been branded as 'The Revolution'.
- 9.107 Significant remediation work has been carried out in relation to the Buckshaw Village site and is subject to the Buckshaw Village Land Use Plan which identifies B1, B2 and B8 development over a number of plots together with a mixed use area. Approximately 1/3rd of the Regional Investment Site has been constructed for employment development with a number of other remaining development plots with outline planning permission for employment use.
- 9.108 Unlike the other strategic sites in the area, the Group 1 Buckshaw site is ranked as 'Good Urban'. This is largely a reflection of the fact that although BAE has ceased working on the site, it will not likely be available for development until 2011. It is anticipated that the majority of this site will be development for housing but with an element proposed for B1 and B2 uses, to be guided by a master plan.
- 9.109 Preparation of a Green Travel Plan and Sustainability Plan would assist in enhancing the future sustainability performance of these strategic development opportunities.

Preston

Preston East Employment Area

- 9.110 This is a very large predominantly undeveloped opportunity strategically located adjacent to the M6 motorway. A large proportion of the site has been acquired by developers Helios Slough to provide around 65,000 sqm. of industrial and warehousing floorspace. In addition, a large part of the site also has planning permission for B1 and B8 uses.
- 9.111 The strategic importance and market attractiveness of this site is reflected in its ranking as 'Best Urban'. As with most other large employment opportunities, any future development of the site should be supported by a Green Travel Plan and Sustainability Plan to assist in addressing environmental and sustainability credentials.

Red Scar Site

- 9.112 This is a large regular site is ranked as 'Good Urban'. It is in multiple occupancy but with three committed plots within it, concentrated mainly towards the currently undeveloped south eastern part of the site.
- 9.113 Existing occupiers, including a large metal recycling operator, allied to its location, make this site most suitable for industrial and warehousing type users. Like the Preston East Employment Area, preparation of a Green Travel Plan and Sustainability Plan would assist in enhancing future sustainability performance.

Millennium City Park

- 9.114 This is a highly attractive site, ranked as 'Best Urban' and located close to the M6 motorway, serviced with a purpose-built internal site road network. Part of the site has been taken up with a number of modern B1 developments. Development of the remaining uncommitted 3.5 hectares

could appropriately seek to secure similar quality of development, including office occupiers.

- 9.115 In order to enhance the site's performance against environmental sustainability criteria, consideration could be given to preparing a Green Travel Plan as part of a strategic framework to guide the development of the remainder of the Park.

Site at Junction 31a (M6) West Loop

- 9.116 This allocated site is strategically located adjacent to junction 31a of the M6. Development is yet to commence which may, in part, be due to the nearby Millennium City Park which is likely to be a more attractive proposition given that it is serviced and unlike land at junction 31a, the site is also remote from residential uses. It is identified as a 'Mixed Use' site.
- 9.117 As with Millennium City Park, in order to enhance the site's performance against environmental sustainability criteria, consideration could be given to preparing a Green Travel Plan (and Sustainability Plan) as part of a strategic framework to guide development proposals.

Land North of Eastway (formerly Broughton Business Park)

- 9.118 This site is a substantial greenfield site in excess of 25 hectares set within open countryside. Part of the site is occupied by Grange Farm and is in close proximity to the residential fringe area of Preston. This employment allocation is subject to some environmental constraints, with a number of tree clusters and adjoining ponds which may have some ecological value and which will need to be considered as part of any comprehensive development.
- 9.119 The redevelopment of Whittingham Hospital Complex (north of this site) requires an upgrade of roads including the provision of a link to the Broughton Bypass which will dissect this site. Provision of this infrastructure will make the site more attractive for employment development although delivery of the by-pass is not anticipated until post 2010.
- 9.120 Pending completion of the by-pass, the site has the potential to accommodate a range of occupiers and to greatly enhance its qualitative contribution to the employment hierarchy. This site also offers one of the few identified opportunities in Preston outside of the Eastern Suburbs area and a proactive approach by the site owners (English Partnerships) should be encouraged.
- 9.121 Given its greenfield status and out of centre location, any future development of the site should be supported by a Green Travel Plan and Sustainability Plan to assist in addressing environmental and sustainability credentials. Completion of the bypass should be prioritised to enable the delivery of this opportunity and also the development of mixed use proposals on land at Whittington Hospital. The site is ranked as 'Mixed Use' which reflects the potential requirement for a Park and Ride facility over part of the site.

Land at Whittingham Hospital

- 9.122 This large hospital complex in a semi rural setting close to the village of Goosnargh. The complex is almost 60 hectares in size of which only 3.83 is proposed for employment use (B1 Office), forming part of a residential-led mixed use scheme (planning application 06/2001/0915). The site is ranked as 'Mixed Use'.

9.123 The site is surrounded by open countryside except for its northern boundary where it adjoins the local village road, opposite which are residential dwellings.

9.124 Overall, the site contains a significant number of mature trees, protected by Tree Preservation Orders and period attractive hospital buildings which appear in a poor condition. Comprehensive development of the site cannot start until construction of the Broughton bypass is commenced from J1 of the M55 to the north of Broughton village. Redevelopment of the hospital complex is therefore not anticipated until early 2010 and it is only following completion of the bypass that the development (of the office component) of the site may become attractive.

Potential Central Business District

9.125 This emerging area covers a large part of Preston City Centre and is in multiple occupancy. There have been several employment commitments within the site however there have also been two significant losses of employment floorspace. The site is complex as it is likely to be in a wide range of different ownerships and owner aspirations within the area are unknown.

9.126 The regeneration of the CBD would need to be underpinned by a comprehensive Area Action Plan or similar to guide the future development of this large site. A proactive approach by the Council, possibly also including the use of CPO powers, may be necessary to secure comprehensive and appropriate redevelopment, including securing an appropriate mix and level of employment and other uses. The site is ranked as 'Mixed Use' and the importance of the site in contributing to the knowledge economy / high value service sector employment has been identified.

South Ribble

Land adjoining Lancashire Business Park

9.127 This comprises an allocated (but not yet committed) large site in excess of 23 hectares. Despite being greenfield in appearance, it is understood that the site is contaminated and ground remediation works will be required in advance of development.

9.128 The site's owners, "Fact Focus", have aspirations to develop the site for employment development but also with an element of residential use. Progression of development proposals are awaiting the resolution of access arrangements associated with the approved Waste Technology Park, which in itself is identified as making a significant contribution towards committed employment land supply.

9.129 Given the large scale of the opportunity, we would recommend that the preparation of a Green Travel Plan and Sustainability Plan be considered to enhance the environmental sustainability performance of any future development proposals. Resolution of access arrangements should be secured to enable the effective delivery of this large site and potentially elevate its ranking from 'Other Urban' to 'Good Urban'.

RO Matrix Park

9.130 This forms part of the large mixed-use Buckshaw Village development, part of which also lies in Chorley Borough.

9.131 This is a highly attractive partly developed employment opportunity and together with other components of the Regional Investment Site, is of

critical importance to future employment land supply within the Central Lancashire Area. The site is ranked as 'Best Urban'.

- 9.132 It is recommended that a Green Travel Plan be prepared to guide the redevelopment of the vacant remainder of the site, particularly for proposals involving the creation of travel-intensive uses.

South Rings

- 9.133 The site is well located within the southern built up edge of Bamber Bridge. A number of site boundaries are also adjacent to the M65 motorway. It is ranked as 'Good Urban'.

- 9.134 A large part of the site has been taken up by non-B Class employment uses including a DIY store, hotel and a fast food restaurant. Given the market attractiveness to such uses, it will be important that the remaining land is safeguarded for future appropriate B-class employment development. A Green Travel Plan and Sustainability Plan should also be considered to guide the development of the remainder of the site.

Kellett Lane

- 9.135 The site is predominantly greenfield land occupied partly by Seed Lee Farm. It is steeply sloping in parts and adjoins the motorway to the south and east, employment uses to the west (Sceptre Point Business Park), and residential uses to the north. Current access to the site is limited via a narrow country lane to the north and a wider local road adjacent to the motorway along the south.

- 9.136 The site is allocated under the adopted Local Plan with a view to creating a prestigious gateway to Walton Summit to promote the business image and investment confidence in South Ribble.

- 9.137 Improving access to the site would significantly improve its market attractiveness and potentially elevate its ranking from 'Other Urban' to 'Good Urban'. As such, measures to improve access at an early stage should be investigated to enhance the development potential of this site and hence, the ability to attract higher value office occupiers on this prominent and potentially prestigious site. Given the nature and location of the site and the type of occupier which is likely to be attracted, a Green Travel Plan and Sustainability Plan should also be considered to guide the development of the site to improve environmental sustainability credentials.

C: Maintaining a Portfolio of Sites

- 9.138 The sites considered as part of this review have been ranked according to their importance and function in the employment land hierarchy. Site classifications and associated recommendations for each type of classification are summarised in the following table and expanded upon in subsequent paragraphs.

- 9.139 As a starting point and unless other site-specific recommendations indicate otherwise, Best Urban, Good Urban and Other Urban sites should be retained for employment use. The release of such land and sites for other forms of development through the development control process should be carefully assessed. We would recommend the use of the following hierarchy of employment policies to assess and control such development.

Table 9.34 Site Classification and Recommendations

Classification	Recommendation
Best Urban (BU)	Protect for B Class employment use
Good Urban (GU)	Protect for B Class employment use
Other Urban (OU)	Protect for B Class employment use – apply criteria-based policy to consider other employment-generating (and also non-employment generating uses) through the development control process
Mixed Use (MU)	Sites identified with particular potential for mixed use development to enhance their current contribution to local townscape quality and quality of the local employment portfolio
Other (O)	Potential for release to other forms of development

Best Urban and Good Urban Sites

9.140 Sites ranked as Best Urban and Good Urban should be retained as they are considered valuable employment sites / areas which should be protected against loss and the gradual erosion through the encroachment of alternative uses.

9.141 **Table 9.35 and 9.36** outlines the sites recommended for inclusion within these classifications:

Table 9.35: Best Urban Sites

	Site	Classification
Chorley	Group 1, Buckshaw (37)	BU
	Southern Commercial Area, Buckshaw (38)	BU
	Regional Investment Site, Buckshaw (39)	BU
Preston	Preston East Employment Area (7)	BU
	Millennium City Park (1)	BU
	RO Matrix Park (OS2)	BU

Table 9.36: Good Urban Sites

	Site	Classification
	Botany/ Great Knowley Site (1)	GU
	Chorley North Industrial Estate (3)	GU
	M61/ Botany Site (2)	GU
	Red Bank/ Carr Lane (Duxbury Business Park) (17)	GU
Chorley	Ackhurst Park/ Common Bank Employment Area (5)	GU
	Stump Lane (16)	GU
	Coppull Enterprise centre (31)	GU
	Highfield Industrial Estate (4)	GU
	East Chorley Business Park (9)	GU
	Telent Site (18)	GU
	Standish Street (26)	GU

	Site	Classification
	Cowling Business Park, Tincklers Lane (28)	GU
	Chapel Lane Industrial Estate (30)	GU
	Chorley Business and Technology Park (36)	GU
	Euxton Lane (40)	GU
	Market Street (48)	GU
	Adlington South Business Village (49)	GU
	Pincroft, Market Street (50)	GU
	Railway Road (64)	GU
	Sagar House, Langton Brow (44)	GU
	Ringway/ Falkland Street (78)	GU
	Preston Riversway (20)	GU
	North Preston Employment Area (30)	GU
	Red Scar Industrial Estate	GU
	Roman Way Industrial Estate (18)	GU
	Riversway Phase B (25)	GU
	Deepdale Street/ Fletcher Street (44)	GU
	Unicentre, Derby Street (49)	GU
	Winckley Square/ Chapel Street (54)	GU
	Walker Street (62)	GU
	Winckley Square (SW)/ East Cliff (65)	GU
	Winckley Square South and East/ Cross Street (66)	GU
	North Road B/ Kent Street (34)	GU
	Ribbleton Lane/ New Hall Lane (46)	GU
	Tulketh Mill (73)	GU
	Croft Street/ Wellfield Road (80)	GU
	West Strand/ March Lane (84)	GU
	Cottam Hall Brickworks (12)	GU
	Cottam Local Centre (13)	GU
	Hartington Road/ Fishergate Hill (22)	GU
	Bow Lane (27)	GU
Preston	Riversway A – Portway/ West Strand (28)	GU
	Rough Hey Industrial Estate (2)	GU
South Ribble	Carr Lane (AS5)	GU
	West Paddock (AS8)	GU
	South Rings (AS1)	GU
	Leyland Business Park (OS6)	GU

Site	Classification
North of Golden Hill Lane (EMP3/6)	GU
Tomlinson Road (EMP4/9)	GU
Braconash Road (EMP4/10)	GU
Heaton Street (EMP4/11)	GU
Walton Summit (EMP3/1)	GU
Sceptre Point (OS4)	GU
South of School Lane (EMP4/1)	GU
North of School Lane (EMP3/2)	GU
Kepak, adj. Walton Summit (SS11)	GU
Edward Street/ Winery Lane(SS26)	GU

Other Urban Sites

9.142 Those sites identified as ‘Other Urban’ are generally of reasonable quality but may be constrained limiting their full current availability or market attractiveness. Certain ‘Other Urban’ sites may be of interest mainly to local occupiers only. As a policy approach to be reflected in the LDF, we would recommend that proposals for non B class employment generating uses (such as trade counter uses, vehicle sales and repairs etc) which may come forward on ‘Other Urban’ sites through the development control process (and also on individual employment sites and premises not examined as part of this study) should only be permitted where the following criteria can be met. It will be necessary to monitor and manage the release of these sites for other uses to ensure that an overall shortage of sites and premises does not occur:

- There would not be an unacceptable adverse impact on the quality and quantity of employment land supply when assessed against requirements and the scale and nature of supply and demand within the area. In assessing quantitative and qualitative issues, regard should be had to available land and premises in the local area and it will therefore be important to monitor take up and losses using this study as a base position.
- These would not compromise the ability to accommodate smaller scale requirements – as identified through our analysis of market demand, employment requirements are often for small – medium scale development. Thus, in assessing qualitative impacts on employment supply, it will be important to assess the realistic potential of premises / sites to accommodate such development when assessing proposals for their release to other uses.
- There would be a net improvement in amenity – most relevant for ‘non-conforming’ uses close to residential areas which create unacceptable environmental or traffic problems and where recycling to an alternative use would offer amenity benefits. For sites in existing employment use, consideration should also be given to the ability to relocate existing occupiers where this is necessary.

9.143 For other uses such as housing, we would recommend that the following additional criteria are also applied:

- Details of active marketing - to allow the full consideration of specific demand, details should be sought on marketing including duration, method and price,

particularly in relation to premises. As part of this assessment, consideration should be given to the appropriateness for subdivision of premises.

- Viability of employment development – details of redevelopment costs to justify that employment development is not viable in the first instance, and if a pure employment scheme is not a viable form of development, whether mixed-use development (including an appropriate element of employment) is a feasible and desirable means of overcoming viability constraints.

- 9.144 In assessing details of active marketing, it will be important to ensure that this has been done for an appropriate period and in a robust way.
- 9.145 The precise period of marketing will be influenced by prevailing market conditions at the time but a minimum period of 12 months would normally be appropriate. Marketing should be carried out by an established commercial property agent and should include on-site boards, adverts in the relevant publications (national property publications and / or local press) and inclusion on the 'Locate in Lancashire' web site. The extent of marketing required will vary from site to site depending on its size and type.
- 9.146 Proposals should also demonstrate that the site is being marketed at a reasonable price comparable to other similar sites and premises in the locality. Flexibility in marketing should also be demonstrated; for example, offering sites / premises on a freehold or leasehold basis and promoting opportunities for smaller requirements through sub-division.
- 9.147 In determining the viability for employment, a development appraisal should accompany proposals to clearly demonstrate why redevelopment for employment purposes is not commercially viable, identifying the abnormal and other costs which would prevent an appropriate employment scheme coming forward.
- 9.148 A list of the 'Other Urban' sites identified through this study are included in **Table 9.37** below. Certain 'Other Urban' sites listed in Table 9.37 have also been identified as having potential to improve their employment classification to 'Good Urban' (as shown in brackets in the 'Classification' column) through the implementation of certain actions to address current issues / obstacles.

Table 9.37: Other Urban Sites

	Site	Classification
Chorley	Railway Road, Adlington (47)	OU
	Cowling Farm, Cowling Road (13)	OU
	Cowling Mill, Cowling Road (14)	OU
	Martindales Depot, Cowling Road (15)	OU
	Southport Road (19)	OU
	Crosse Hall Street including Weir Mill (24)	OU
	Blainscough Works, Blainscough Lane/ Preston Road (32)	OU
	Rear of New Street, Mawdesley (46)	OU
	Gas Works, Bengal Street (27)	OU
	Common Bank Bleach Works (20)	OU
	William Lawrence Site (23)	OU
	Twin Lakes Industrial Estate (41)	OU

	Site	Classification
	George Street Clarence Street Estate including Brunswick Mill (6)	OU
	Apex House, Stump Lane (7)	OU
	Yarrow Mill Industrial Estate (11)	OU
	Quarry Road Industrial Estate (12)	OU
	Land and Park Mills Deighton Road (21)	OU
	Duke Street Motors Site (22)	OU
	Clover Road (29)	OU
	Land at Wigan Road (33)	OU
	Euxton Mill, Dawber Lane (34)	OU
	Rear of 37-41 Wigan Road (35)	OU
	Westhoughton Road (51)	OU
	Grimeford Industrial Estate (54)	OU
	Swansea Lane (57)	OU
	Swansea Mill, Mill Lane (58)	OU
	Waterhouse Green, Rear of Chorley Old Road (59)	OU
	Kem Mill, Kem Mill Lane (61)	OU
	Preston Road (63)	OU
	Harpers Lane (68)	OU
	Briercliffe Road (69)	OU
	Gregson Lane Industrial Estate (65)	OU
	Transport Depot, Rufford Road, Mawdesley (66)	OU
	Grove Mill (43)	OU
	Towngate Works (45)	OU
Preston	Walker Street/ Great Shaw Street (60)	OU
	North Road A (69)	OU
	Warehouses, Home Slack Lane (3)	OU
	Frenchwood Knoll/ Selborne Street (48)	OU
	County Offices, East Cliff (53)	OU/OS
	Site of former St Mary's Church, Friargate Brow (58)	OU
	Hope Street/Corporation Street (59)	OU
	Kaymar Industrial Estate (68)	OU
	Fire Station, Blackpool Road (4)	OU
	Skeffington Road/ Castleton Road (5)	OU
	Moor Lane/ Cragg's Row (31)	OU
	Council Depot, Argyll Road (32)	OU
	Moor Lane/ Victoria Street (33)	OU
	Rye Street/ Canute Street (35)	OU
	Eastham Industrial Estate/ Aqueduct Street (36)	OU

	Site	Classification
	Deepdale Mill, Deepdale Mill Street (37)	OU
	Tennyson Road Mill (38)	OU
	Ribbleton Street/ Deepdale Road (40)	OU
	Ribbleton Lane/ Longworth Street (41)	OU
	Deepdale Mill Street (43)	OU
	Crook Street/ Campbell Street (45)	OU
	Blackpool Road/ West View (47)	OU
	Tulketh Brow/ Fylde Road (70)	OU
	Depot, Shelley Road/ Old Lancaster Lane (71)	OS/OU
	Shelley Road (72)	OU
	Lane Ends Trading Estate (74)	OU
	Oxheys Industrial Estate (75)	OU
	Cattle Market (76)	OU
	Starkie Industrial Estate/ Brierley Street (77)	OU
	Jubilee Trading Estate (81)	OU
	Brunel Court, Ladywell Street (82)	OU
	Leighton Street (Gypsy Site and adjacent Land) (83)	OU
	Greenbank Street/ Bond Street (85)	OU
	Maudlands, Aqueduct Street (86)	OU
	Hazelmere (County Fire Brigade HQ) (11)	OU
	Midland House, Maritime Way (23)	OU
	Paley Road (24)	OU
	Riverside Sites 5/6 (26)	OU
	Site at Junction 31a (M6) East Loop (9)	OU
	Fulwood Barracks (10)	OU
	Depot, Whittingham Lane, Broughton (16)	OU
	<hr/>	
	Farington Business Park (AS2)	OU
	Land Adjoining Lancashire Business Park (AS6)	OU (GU)
	Land within Lancashire Business Park (AS7)	OU/OS
South Ribble	Kellett Lane (OS7)	OU (GU)
	Moss Side	OU
	Lancashire Business Park	OU
	Centurion Way Estate	OU
	King Street (EMP4/8)	OU

Site	Classification
Club Street (EMP4/2)	OU
Brownedge Road (EMP4/3)	OU
Sherdley Road (EMP4/5)	OU
Factory Lane (EMP4/6)	OU
Dunkirk Lane (SS1)	OU
Leyprint, Severn Stars (SS2)	OU
Preston Road, Farington (SS4)	OU
Goldenhill, Leyland (SS7)	OU (GU)
Longmeanygate, Leyland (SS8)	OU
Quin Street, Leyland (SS10)	OU
Earnshaw Bridge Mill (SS31)	OU
Tardy Gate Mill (SS20)	OU
Hecla Works, Brown Street, Bamber Bridge (SS22)	OU
Pear Street, Bamber Bridge (SS23)	OU
Liverpool New Road, Much Hoole (SS24)	OU
Aspden Street, Bamber Bridge (SS27)	OU
Hopwood Street, Bamber Bridge (SS28)	OU
Higher Walton Mill (SS14)	OU
Coupe Foundry, Higher Walton (SS15)	OU
Walmer Bridge (SS32)	OU

Mixed Use Sites

9.149 A number of sites have also been identified through this study as being particularly suitable for mixed-use development as means of enhancing the site's current contribution to local townscape quality. We recommend that the sites included in **Table 9.38** are identified for mixed-use development.

Table 9.38: Mixed Use Sites

	Site	Existing Use	Classification	Size (Ha)
Chorley	Friday Street (8)	Retail & employment	MU	3.55 ha
	Withnell Fold Mill (55)	Part occupied (employment), part vacant	MU	1.60 ha
	Abbey Village Mill (56)	Industrial	MU	2.99 ha
	Park Road (52)	Warehouse and offices	MU	0.78 ha
	Radburn Works, Sandy Lane (62)	Vacant former concrete block / aggregates site	MU	2.95 ha
	Rear of Carrington Centre (42)	Retail & employment	MU	0.97 ha
Preston	Former Whittingham hospital (87)	Former hospital	MU	51.66 ha
	Land North of Eastway	Greenfield (vacant but part occupied by Grange Farm)	MU	24.68 ha

	Site	Existing Use	Classification	Size (Ha)
	Avenham Street (56)	Residential, employment & car park	MU	1.75 ha
	Shepherd Street/ Oakham Court. Laurel Street (63&64)	Employment & car park	MU	1.87 ha
	Potential Central Business District (79)	Various including employment, residential & retail	MU	9.77 ha
	Sharoe Green Hospital (29)	Former hospital, part still in use	MU	10.36 ha
	Ormskirk Road (50)	Office & leisure	MU	0.71 ha
	Fox Street/ Corporation Street/ Surgeon's Court (55)	Offices & car park	MU	1.34 ha
	St Joseph's Hospital, Mount Street (57)	Former hospital	MU	0.41 ha
	Church Street/ Pole Street (61) <i>Already Development for Mixed Use</i>	Residential & offices	MU	0.17 ha
	Princes Building, Lancaster Road (67)	Offices, retail & open space	MU	0.39 ha
	25-109 Garstang Road (14)	Residential & retail	MU	5.18 ha
	Junction 31a West Loop (8)	Greenfield – current LP Policy for employment / D2 use	MU	4.32 ha
	Land at New Hall Lane/ St Mary's Street (39)	Offices, ecclesiastical & commercial	MU	1.54 ha
South Ribble	Moss Side Test Track (MU1)	Former vehicle testing track	MU	39.93 ha
	North of Lostock Lane (EMP4/4 & OS7)	Retail, PFS, hotel, pub and vacant land with pp for offices	MU	21.74 ha
	Lostock Hall Gas Works (MU2)	Former gas works site (cleared)	MU	10.5 ha
	Liverpool Road, Walmer Bridge (MU3)	Residential & pub. Vacant remainder for employment	MU	2.79 ha
	Higher Walton Mill (SS14)	Employment (various)	MU	3.97 ha

9.150 The precise mix and nature of uses on specific sites will need to be examined on an individual basis and will need to consider a range of other policy and development requirements.

9.151 It would be anticipated however that an element of employment use should form part of the overall mix on any site to ensure that development maintains and where possible, improves the site's qualitative contribution to the employment portfolio. In this regard, consideration should be given to the potential for mixed-use sites to accommodate start-up space or incubation facilities, particularly where this can also promote the further development of the knowledge-based economy in the area. In many cases, it will be appropriate to consider a residential component as part of the overall mix, particularly where this is demonstrated to be the most appropriate level and type of employment provision for the site.

Other Sites

9.152 Sites classed as 'Other' generally perform poorly under the qualitative assessment, but can provide certain functions in the employment hierarchy such as through the supply of lower grade employment land and accommodation for secondary occupiers. Users on established sites are therefore often difficult to relocate – rentals are frequently prohibitive elsewhere and/or amenity considerations make this difficult. These sites

are identified as having potential for release from the employment portfolio. For those 'Other' sites in current occupation, consideration should also be given to relocating existing occupiers to other sites / premises in the local area as part of development proposals.

- 9.153 Those sites identified in the 'Other' category do not appear in Table 9.7 and hence, are not specifically relied upon to contribute to future employment land supply in terms of available vacant land. Although in instances where such sites include employment buildings (occupied and vacant), their loss sites would impact on the overall amount of the employment stock in that particular area, given their nature this loss is not considered significant.

Table 9.39: 'Other' Sites

	Site	Existing Use	Classification	Size (Ha)
Chorley	Brook Mill, Brook Street Adlington (53)	Part occupied (employment)	0	0.4
	Land off Chorley Old Road (60)	Scrap yard	0	0.14
Preston	The Brick House (6)	Office & open storage	0	0.98
	Vernon Carus, Factory Lane (SS18)	Vacant (factory building)	0	2.57
	Samlesbury Mill, Goosefoot Lane (SS12)	Industrial (pet food manufacturer and small workshops)	0	0.48
South Ribble	Roach Bridge Mill, Samlesbury (SS13)	Vacant mill	0	1.58
	Bannister Hall Works (SS16)	Warehouse & industrial	0	2.21
	Bamfords Mill, Midge Hall (SS3)	Globe Mill (employment)	0	2.34
	Peel View, Drumacre Lane (SS29)	Storage (trailer rental)	O/OS	0.89

D: Type and Mix of Vacant Premises

- 9.154 The supply of vacant premises, in terms of amount, size, nature and quality, varies significantly across the study area. In many of the more rural sub areas, very limited vacancies have been identified but this is influenced by the nature of local markets, with premises often not advertised through commercial agents for example.
- 9.155 The Chorley Central sub area offers a range of industrial units and has a high current vacancy rate in this sector, although this is mainly due to three very large currently vacant speculative units provided at the Revolution. In comparison, office vacancies are much smaller in number and average size, with very little speculative office development identified.
- 9.156 Within Preston City Centre, industrial vacancies are unsurprisingly limited. At the time of the study, office vacancies accounted for about 8% of overall office stock in the City Centre, a level which is to be expected in a normal market with space for tenants to move around and take space in a variety of buildings. Much of the office space is however of older stock being refurbished and let in smaller units. Elsewhere in Preston's urban areas, in general terms available industrial premises are often focussed towards smaller properties but as a sector, is more important than offices.

- 9.157 Within the South Ribble sub areas of Leyland and Farington and, Lostock Hall, Bamber Bridge and Penwortham, the industrial sector heavily dominates and there generally appears to be a reasonable availability of vacant premises providing for a range of size requirements. The office sector, and supply of vacant premises, is more limited by comparison, but with some new space being constructed including at Matrix Park.
- 9.158 In order to maximise the opportunity for accommodating requirements in the area, it is critical that prospective occupiers can readily obtain comprehensive and up to date details of vacant premises and land. As such, we would recommend that the 'Locate in Lancashire' vacant property database is maintained and regularly updated as an important proactive measure to promote local economic development.

E: Rural Areas and Market Towns

- 9.159 Overall the quantity of supply is generous for the Central Lancashire Area as a whole, although this is often focussed mainly in just one sub area of each Local Authority area i.e. in Chorley Central, Preston East and Leyland & Farington. Providing additional opportunities for (small-scale) sustainable employment outside of these sub-areas will also be important in order to promote a vibrant economy in other 'rural' sub areas within each Council.
- 9.160 To address this issue, we would recommend the inclusion of a suite of policies in the LDF to maintain and enhance opportunities for employment development within and on the edge of market towns and larger settlements as well as within rural areas more generally (see 'F' below).
- 9.161 Also, the identification of specific additional sites at those Market Towns and larger settlements included within the following sub-areas (where the current level employment land supply is particularly restricted in terms overall amount and number / quality of opportunities) could also be considered through the LDF:

Table 9.40: Rural Sub Areas With Potential For Additional Employment Sites

Local Authority	Sub Area
Chorley	Chorley East (2), Chorley West (3)
Preston	Preston Rural (8)
South Ribble	Eastern Parishes (11), Western Parishes (12)

F: Local Planning Policy and Other Responses

Planning Policy Responses

- 9.162 The adopted Local Plans for the three local authority areas take slightly different policy approaches towards the provision and protection of employment land. There are however a number of commonalities which can be generally summarised as follows:
- Policies to identify the main employment allocations (including strategic employment opportunities) and seek to protect these for employment purposes. Also site-specific policies and requirements for certain key new employment opportunities;
 - Protection of existing employment areas and promotion of appropriate employment-generating development / redevelopment in such locations;

- Policies to promote and guide employment development outside of identified sites, including in urban and rural areas; and
- Promotion of the re-use of rural buildings for business / employment-generating use in the first instance (notably within Chorley and South Ribble where Local Plans identify that such buildings have experienced pressure for conversion to residential).

9.163 We would recommend that a broadly similar hierarchical approach be carried forward into the LDF, such as that summarised in **Table 9.41** below:

Table 9.41: Suggested LDF Employment Policy Hierarchy

Issue	Policy Response
'Best Urban' Sites	<ul style="list-style-type: none"> • Identify 'Best Urban' new employment opportunities and existing sites, protect for B class employment uses, set out site-specific development requirements.
'Good Urban' Sites	<ul style="list-style-type: none"> • Identify 'Good Urban' new employment opportunities and existing sites, protect for B-class employment use, set out site-specific development requirements.
'Other Urban' Sites	<ul style="list-style-type: none"> • Identify 'Other Urban' sites and opportunities. Adopt a criteria-based policy to assess non-B class uses which may come forward through the development control process. Also apply criteria generically to proposals which would result in the loss of premises not part of employment allocations or established estates.
'Mixed Use' Sites	<ul style="list-style-type: none"> • Identify 'Mixed Use' sites, set out key development criteria in terms of mix etc.
'Other' Sites	<ul style="list-style-type: none"> • Identify 'Other' sites as those which can be released from the employment hierarchy (possibly actively promote for other forms of development through the LDF).
Market Towns and larger settlements	<ul style="list-style-type: none"> • General policy to promote small-scale sustainable employment opportunities in and on the edge of Market Towns and other larger settlements (notably in those sub areas where supply is currently restricted).
New employment in Other urban and rural areas	<ul style="list-style-type: none"> • General policy to promote / guide new employment development / expansion within urban areas and within other settlements; • General policy to promote / guide expansion of existing employment uses in rural areas; • Promotion of rural diversification and the business (i.e. employment generating) re-use of rural buildings in the first instance; and • Enhance currently available opportunities for new office development in Preston City Centre and also other urban centres, notably in Chorley and also adopt a policy to guide the location of new office development, including for locations outside of city / town centres (also see Table 9.31).

Supplementary Planning Documents

9.164 For major sites and those with complex or numerous issues to be considered, it will often be appropriate to prepare site Master Plans, Supplementary Planning Documents or Area Action Plans to guide future development. These can be a useful tool, particularly in terms of setting out clearly the main requirements and other considerations associated with particular development opportunities. They should be based on a thorough understanding of commercial considerations and market realism to ensure that the optimum form and mix of development can be delivered. This understanding will require the input of commercial development surveyors. It will also be important to ensure that sites are promoted to accommodate

a wide range of size requirements, including new start-ups and SME's, to accommodate demand.

Use of Other Planning Powers

- 9.165 Other powers such as the designation of Simplified Planning Zones and the making of Local Development Orders and Compulsory Purchase Orders could also be explored to assist in the delivery of specific sites where such actions are deemed necessary.

G: Monitoring

- 9.166 In order to maintain a robust basis for assessing proposals and keeping employment policies up to date, it is important that the Councils (potentially in conjunction with the Lancashire County Council), monitor and keep under regular review the following:

- Employment land supply, including commitments outside of identified local plan sites. Monitoring of site area and floorspace information should be carried out. Where possible B1 classes should be split between offices (B1a) and, research and development and light industrial sites (B1b&c) to allow for detailed monitoring of land take up and trend analysis. This allows for a more robust approach in terms of the assessment of land supply in the context of planning use class and importantly market sectors.
- Where possible business relocations and expansions into and out of the Borough / Central Lancashire area (through planning applications).
- Discussions with local agents.

- 9.167 Implementation of monitoring recommendations will be important in order to properly assess proposals impacting on employment land supply (i.e. application of the above-mentioned assessment policy criteria).

- 9.168 In accordance with emerging Regional planning policy, the local authorities should review their land portfolio every three years, which is in broad accordance with the 2004 ODPM good practice guide, which identifies that reviews should be undertaken at no more than 5 yearly intervals.