



Employment Land Review Study

Blaenau Gwent

Final Report

October 2019

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EXECUTIVE SUMMARY

Introduction

- i. This report provides an Employment Land Review to support the Blaenau Gwent Replacement Local Development Plan (LDP). The study links to, and is informed by, the Regional Employment Study for Torfaen, Blaenau Gwent, Monmouthshire, Caerphilly and Newport. The study updates previous employment land evidence base documents for the County Borough.

Methodology

- ii. A number of research methods have been used, including site visits and interviews with property market stakeholders such as developers, investors and their agents. Major employers in the County Borough have been individually consulted, as have key public-sector agencies. Finally, the land supply has been assessed against forecast data to understand future land need. The methodology follows Welsh Government '*Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan*' on employment land reviews and accounts for other Welsh Government Policy, including TAN 23 and Planning Policy Wales.

Findings

- iii. The socio-economic profile of Blaenau Gwent shows modest population declines over the last five years, against growth across Wales/UK. Blaenau Gwent's unemployment rate is high in the national context but below average for the Cardiff Capitol Region (CCR). Blaenau Gwent has issues with educational qualifications, a low proportion of residents are qualified to degree level and a comparatively high proportion of people have no qualifications.
- iv. As of 2017, Blaenau Gwent's economy supported 18,500 jobs. In the last five years, employment has declined by 12 percent, against the growth observed in the City Region and Wales as a whole. That reduction is primarily driven by net losses in health sector employment.
- v. The largest sector in Blaenau Gwent's economy is manufacturing, with 4,000 jobs (21 percent of total jobs), 2.7 times the proportional size of the manufacturing sector in Great Britain. This reflects the fact that while Blaenau Gwent may have lost much of its traditional industry, it has been successful in attracting new high value

manufacturing and production businesses.

- vi. The public sector makes up a considerable share of employment. There is however indication that some creative and high-value service sectors, such as ICT, Finance and Professional Services, which are under-represented in the economy, are growing fast, presenting an opportunity for diversification into a modern, service-based economy.
- vii. In terms of commuting, Blaenau Gwent has a modest level of self-containment, 52 percent. The strongest commuting relationships are with Monmouthshire, Caerphilly and Torfaen. In terms of migration, younger families appear to be leaving the Borough while the over 40s are attracted in.
- viii. Stakeholders were positive about Blaenau Gwent's economic future. In addition to the Welsh Government investment there are strong trends of inward investment, with new companies encouraged into the area by its affordable property, high quality environment and strong strategic transport links. Notwithstanding the comparatively low levels of educational attainment noted above, Blaenau Gwent's workforce is judged to be skilled, particularly in manufacturing sectors, and this further increases the attractiveness of the County Borough to businesses. Blaenau Gwent is also identified as having the second highest business start-up rate in Wales. The high level of start-ups brings demand for smaller industrial units of 0-100 sqm (up to up to 500 sqm in some estimates), although there are also shortages in the 5,000 sqm range to allow larger firms to grow.
- ix. Stakeholders argue that there are significant supply shortages across Blaenau Gwent, particularly for smaller industrial properties and freehold options. Much of the available property is also relatively dated and in need of refurbishment although investment has occurred in some privately-owned schemes. Rental values for general industrial units are typically around £19.40-£26.90/sqm (£1.80 - £2.50/sqft), rising to £32-£43/sqm (£3.00-£4.00/sqft) for refurbished options.
- x. Historically, office demand has been limited to local services utilising small office suites above shops in the town centres and public sector occupiers. The regeneration of the former steel works in Ebbw Vale has, however, stimulated positive market demand for small scale hybrid office/tech space. A number of recent decisions look set to further stimulate the market, including that by Thales to establish a new Cyber

Security Research Centre in Ebbw Vale and ongoing Welsh and Local Government investments in The Works.

- xi. In Blaenau Gwent, the main policy tool for driving forward change is the Ebbw Vale Enterprise Zone. To date, delivery in the Enterprise Zone has been slow. This is felt to reflect the level of site works and infrastructure needed to bring sites forward, rather than a lack of demand. Several key projects are now being progressed and are discussed further in Sections 5.0 and 6.0 of the Main Report.

Employment Land Supply and Need

- xii. The maximum employment land supply, from 13 LDP allocated sites, is 50.0 ha. However, a review of site conditions and owner intentions suggests a realistic supply of 45.81 ha in 12 sites.
- xiii. To assess need, three recognised methods of forecasting have been used, reflecting Welsh Practice Guidance:
- Practice Guidance Method One: Past Building Completions – Utilises all past take up data since 2007, identifying an annual average take-up rate of 1,937.9sqm/year calculated on a 40 percent plot ratio
 - Practice Guidance Method Two: Labour Demand Forecasting (Policy Off) – jobs growth, as identified in Oxford Economic (2019) forecast modelling, consistent with jobs densities and plot ratios defined in Welsh Practice Guidance
 - Practice Guidance Method Two: Labour Demand Forecasting (Policy On) – jobs growth, as identified in Oxford Economic (2019) forecast modelling, but with an allowance for an extra 3,375 jobs based on population projections, the impact of the Enterprise Zone, reducing out commuting, increasing the economic activity rate and reducing the employment rate. Approximately a quarter of the jobs, 800, would be in office sectors and 2,575 in manufacturing. The model again uses jobs densities and plot ratios defined in Welsh Practice Guidance.
- xiv. The outputs from all the models are outlined in Table ES1.

Table ES1 – Land Forecast Models – Summary

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
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Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
Practice Guidance Method One: Past Building Completions Minimum Land Target	45.81	B1 Office: - B1/B2 Ind: 5.02 B8: 2.10 Total: 7.12	B1 Office: - B1/B2 Ind: 1.67 B8: 0.75 Total: 2.42	B1 Office: - B1/B2 Ind: 6.69 B8: 2.85 Total: 9.54	36.27	Based on historic (11 years) take-up of 1,937.9 sqm/year at a 40 percent plot ratio
Practice Guidance Method Two: Labour Demand Forecasting (Policy Off)	45.81	<i>Net Change</i> B1: 0.25 B2/B8: (15.86) Total: (15.61) <i>Growth Only</i> B1: 0.65 B2/B8: 0.39 Total: 1.04	<i>Net Change</i> B1: 0.08 B2/B8: - Total: 0.08 <i>Growth Only</i> B1: 0.22 B2/B8: 0.13 Total: 0.35	<i>Net Change</i> B1: 0.33 B2/B8: (15.86) Total: (15.53) <i>Growth Only</i> B1: 0.87 B2/B8: 0.52 Total: 1.39	<i>Net Change</i> 61.34 <i>Growth Only</i> 44.42	Policy Off Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors
Practice Guidance Method Two: Labour Demand Forecasting (Policy On) Maximum land target	45.81	<i>Net Change</i> B1: 3.45 B2/B8: 27.28 Total: 30.73 <i>Growth Only</i> B1: 3.85 B2/B8: 27.54 Total: 31.39	<i>Net Change</i> B1: 1.15 B2/B8: 9.09 Total: 10.24 <i>Growth Only</i> B1: 1.28 B2/B8: 9.18 Total: 10.46	<i>Net Change</i> B1: 4.60 B2/B8: 36.37 Total: 40.97 <i>Growth Only</i> B1: 5.13 B2/B8: 36.72 Total: 41.85	<i>Net Change</i> 4.84 <i>Growth Only</i> 3.96	Policy On – 3,375 additional jobs Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors <i>N.B. if a lower Policy-On jobs growth figure of 1,500 is assumed, solely from the Enterprise Zone, needs become 1.85 ha in net need, 3.05 ha from growth only need. This equates to:</i> <i>Net change: 43.96 ha</i> <i>Growth only: 42.76 ha</i>

Source: Blaenau Gwent CBC/BE Group, 2019

*Realistic land supply

- xv. The figures allow for a minimum five-year flexibility buffer to allow for choice and potential change in needs during the LDP period as well as providing some accounting for further possible losses in the supply.
- xvi. Under all land take up models, Blaenau Gwent has enough quantity of land to meet its needs.
- xvii. The policy-off jobs based forecast model suggests the County Borough has a major oversupply of employment land. This indicates that all the current land supply may be surplus to requirements based on this quantitative assessment. However, the market assessment and a review of the historic trends in employment change and land take up (see Section 7.0) suggest that these forecasts underestimate land needs significantly.
- xviii. In terms of the other two forecasts it is argued that Practice Guidance Method One: Past Building Completions represents the minimum land requirement (9.54 ha) Blaenau Gwent will have if none of the Enterprise Zone programmes were realised and the County Borough's growth remained unchanged from the last decade. Practice Guidance Method Two: Labour Demand Forecasting (Policy On) represents the maximum land requirement (40.97-41.85 ha) generated if all policy on programmes are realised to their fullest extent, with extensive local job generation and growth, particularly in B2/B8 sectors. Actual growth, to 2033, may thus fall between the two.

Recommendations

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

Blaenau Gwent County Borough Council use the roll forward of historic take-up as the minimum land target and Labour Demand Forecasting (Policy On) as the maximum land target. In practice, this means that the Council should allocate a land supply of not less than 41-42 ha to meet emerging policy commitments and support the best level of jobs growth forecast. Even under the worst future economic conditions, however, the supply should not be allowed to drop below 9-10 ha to allow the County Borough to maintain its current rate of economic growth.

- xx. With quantitative land needs of up to 41.85 ha against a supply of 45.81 ha, there is enough land available to meet needs, although the resulting surplus is not large. To meet needs on a strongly pro-growth strategy, Blaenau Gwent requires effectively all the remaining allocated land it has. Thus, it is not recommended that the Council release any of the EMP1 Allocations for other uses, unless viable and deliverable alternative sites are put forward.
- xxi. Recommendations for individual employment sites have been summarised in Table ES2 (Employment Land Recommendations) below.

Table ES2 – Employment Land Recommendations

Policy ID.	Name	Allocate in the new LDP?	Recommendations
EMP1.1	Land at Festival Park	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment use. Key infill plot in a high value local employment area, which is attracting market interest. Given the demand for this land, the Council should put in place a plan to allow for its disposal, as soon as possible.
EMP1.2	Land at Tredegar Business Park	Yes Consider allocation as a 'Primary Site' to allow a broader range of B-Class uses on the land, in line with market interest.	The site should be retained for employment purposes. Land represents a logical extension to an existing business park and location is attracting market interest. Also, land supply is more limited in Tredegar compared to Ebbw Vale. Given market interest, it is recommended that acceptable uses here be broadened to B1/B2/B8 and relevant Sui Generis. Larger size of site also means it is better able to support B2/B8 options than many other sites in the Tredegar area.
EMP1.3	Land at Rising Sun Industrial Estate	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment purposes. Although the adjacent school puts some limits on what can be delivered here, the land is still required by the market, representing a defined growth plot for Rising Sun Industrial Estate.
EMP1.4	Rassau Platform A	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route.
EMP1.5	Rassau Platform B	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route. Site would be accessed through neighbouring land - EMP1.4 Rassau Platform A. It is assumed both sites would be brought forward as a linked development scheme. The site boundary, in the existing LDP, incorporates a sizable area of woodland to the south (5 ha, approx.) included to secure S106 funding for woodland management/improvements as part of any development scheme. This approach should be reviewed in the replacement LDP.
EMP1.6	Land at Waun y Pound	Maybe Protect as 'Primary Site' in the LDP hierarchy, subject to clarification on site conditions.	The site should be retained for employment use. Expansion land to a small, but modern, local industrial estate, accommodating major employers, which has seen some development. Site is attracting market interest, but stakeholders also suggest that historic uses on the site do impact on deliverability. This should be clarified before site is allocated again in the next LDP. Site boundary should be amended to remove developed land.
EMP1.7	Marine Colliery	Maybe Assumed not as current likely development is rail freight use	Review future of site, reflecting the differing requirements noted above. If rail freight for quarry emerges as preferred option, then the location becomes a minerals and waste transport facility rather than land for B1/B2/B8 employment. This change of focus should be reflected in the emerging LDP and the land removed as an ordinary employment allocation.
EMP1.8	Crown Business Park Platform A	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment use. Site owner is considering B-Class uses to meet both its own needs, and the needs of others. Development of this site thus appears likely.

Policy ID.	Name	Allocate in the new LDP?	Recommendations
EMP1.9	Crown Business Park Platform B	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Expansion land in a large local industrial estate, accommodating a number of major employers for the County Borough. The land has, and continues to, receive enquiries for several B-Class uses.
EMP1.10	Land at Roseheyworth Business Park	Yes - Part Protect as 'Primary Site' in the LDP hierarchy.	Protect the remaining land for B-Class uses. The Waste Facility significantly reduces the available B-Class development land, but a useful expansion site remains of 0.71 ha which allows some growth to Roseheyworth Business Park, now a local centre for high tech and high value businesses. Adjust site allocation boundary to allow for Waste Facility and to account for any land which is undevelopable due to flood risk.
MU1	Bryn Serth	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment. Although in the short term most development here is likely to be for non B-Class uses, the land represents a logical next phase of development for Rhyd y Blew to the north where development is likely in the short term. Completion of Rhyd y Blew would provide a critical mass of B-Class premises in the area and, assuming success here, encourage developers to look south for more development land to continue growth.
MU1	Rhyd y Blew	Yes Protect as 'Strategic Site' in the LDP hierarchy.	The site should be retained for employment purposes. The land has larger than local significance and is a key regeneration investment site for the County Borough. In seeking consent for B-Class uses, Welsh Government have made a commitment to development here and considered speculative delivery.
MU2	'The Works' Business Hub	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment use. Very high value infill plots in a key regeneration area. Plans for B-Class premises are being actively progressed on all the plots, with multiple planning consent's secured along with funding.

Source: BE Group, 2019

xxii. Table ES3 provides Area specific recommendations:

Table ES3 – Existing Employment Area Recommendations

Policy ID.	Name	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.1	Tredegar Business Park	The site should be retained for employment purposes, reflecting the range of high value uses found here. Site is primarily in B1 use, but future growth on EMP1.2 Land at Tredegar Business Park, will likely extend across the B1/B2/B8 use classes, reflecting wider demand. (Yes) Consider allocation as a 'Primary Site' to allow a broader range of B-Class uses on the land, in line with market interest.
EMP2.2	Rassau Industrial Estate	The site should be retained for employment use. Location comprises a well-established strategic scale industrial estate, a key part of the County Borough's offer in the Heads of the Valleys economic corridor and a focus for inward investment. (Yes) Given the focus of this location for major business occupation and its position on the Heads of the Valleys Road, we would recommend this location be designated a 'Strategic Site' in the LDP hierarchy
EMP2.3	Waun y Pound Industrial Estate	The site should be retained for employment use. Well located, mostly local scale site which has seen recent development and is attracting market interest. Constraints may mean that further expansion here is a slow process. Smaller scale premises are increasingly dominated by B8 trade uses, which requires further monitoring. LDP policy could consider splitting the location into separate areas for trade and industrial/warehouse employment to protect the remaining industrial/storage uses as a Primary Site. (Yes – part at least) Protect as 'Primary Site' in the LDP hierarchy, in part at least.

Policy ID.	Name	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.4	Festival Park	The majority of the site should be retained for employment use, as a high-quality local employment area including office and business centre options The boundary of the employment site could be amended to exclude the southern area of the site. The area is small and consists of only 5 employment units, a hotel and restaurant which are predominantly non B uses. This area of the site is located within a residential area and is divided from the rest of the industrial estate via the A4046. The larger offices should still be protected though, give the scarcity of such options locally. (Yes – part at least) Protect as 'Primary Site' in the LDP hierarchy, in part at least.
EMP2.5	Tafarnauach Industrial Estate	The site should be retained for a primary employment site. Location also appears to be a good source of further employment land, should it be needed. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.6	Crown Business Park	The site should be retained for a primary employment site as a local, but still high value site in the Heads of the Valleys Economic Corridor. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.7	Pond Road Workshops	Low value site, but still serving some economic functions. Based on an occupancy rate of around 70 percent the area should be protected, but not to the exclusion of any alternative options which may generate superior economic or community value. If vacancy rates, site conditions decline further, any allocation would need to be reviewed. (Yes) Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy.
EMP2.8	Blaenant Industrial Estate	The site should be retained for employment use, reflecting the presence of several key local occupiers for the County Borough. Some Council owned development land is available here, should it be required. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.9	Barleyfield Industrial Estate	Consideration should be given to change the site to a secondary employment site which allows an acceptable commercial service as well as B1, B2, and B8. The sub-division of the units has allowed for the creation of very small units. However, such small, affordable units are needed to serve the local market and the high level of local start-ups. The modest vacancy rate suggests that the site is still serving a function and should be protected. (Yes) Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy
EMP2.10	Rising Sun Industrial Estate	The site should be retained for employment purposes, reflecting both its offer of micro business space and the presence of several large employers. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.11	Cwmtilery Industrial Estate	The site should be retained for a primary employment site, based on the range of occupiers and the reasonable quality of most units. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.12	Roseheyworth Business Park	The site should be retained for employment use, reflecting good occupancy rates and the general quality of the stock. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.13	Cwm Draw Industrial Estate	Main estate in the north is of reasonable quality, with a mix of occupiers. Would suggest the wider area boundary is too widely drawn, including several disused plots in the south with only limited linkages to the main employment area. Consider removing them from the allocation and allowing some flexibility as to growth in this southern part while protecting a more tightly defined employment area in the north. (Yes – part at least) Protect as 'Secondary Site' in the LDP hierarchy, in part at least.

Policy ID.	Name	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.14	Marine Street Industrial Estate	The site should be retained for employment use. Site serves a function, with a 79 percent occupancy rate, but continued monitoring is required to identify further evidence of decline. In the long term, plans for refurbishment and/or redevelopment may need to be considered. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.15	Sirhowy Hill Industrial Estate	Area has value, but for a broader mix of employment generating uses beyond the B-Class. Due to the pressure for alternative uses, it may be more beneficial to not protect the industrial estate and allow the estate to be guided by the market. (No)
EMP2.16	Bridge Street Industrial Estate	The site should be protected for a Key Local Employment Site. Although quality is moderate, the estate is in full use and provides useful micro business space, particularly for car garages which may not be able to afford options elsewhere. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.17	Noble Square Industrial Estate	The site should be retained as a secondary employment site. Contains a small, but well-established group of SMEs. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.18	Blaina Enterprise Centre	Given the mix of uses on the estate, the site should be retained as a secondary employment site. Location continues to serve a purpose accommodating a diverse group of micro firms. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.19	Cwmcrachen Industrial Estate	The boundary of the site will need to be reconsidered in terms of the new gypsy traveller site. However, given the location only has one premises occupier, in non B-Class use, plus approx. three open storage uses/vehicle depots, two with narrow road access, the location is of limited economic value. Given area conditions and neighbouring uses it is unlikely to attract many further new businesses. It is recommended that the area is not allocated in the LDP as a B-Class employment area but left free to accommodate a broader range of uses which could generate economic and community value, appropriate to the location. (No)
EMP2.20	Glandwr Industrial Estate	The site should be retained for employment purposes, reflecting the recent investment here and the generally high quality of its offer of B2/B8 premises. Given the reasonable quality of much of the stock and strong A-Road location, it is recommended that it be considered a Primary rather than Secondary employment site. (Yes) Given site conditions, it is recommended that it be protected as a 'Primary Site' in the LDP hierarchy
EMP2.21	Llanhilleth Industrial Estate	The site should remain as a secondary employment site which allows an acceptable commercial service as well as B1, B2, B8 and SG uses. This reflects the reasonable quality of the location and the fact that it appears well used. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.

Source: BE Group, 2019

- The existing LDP Employment Land/Area Hierarchy is accepted and recommendations on how areas could fall into that hierarchy are provided in Tables ES2-3. Within the Strategic Sites/Business Parks/Primary Sites, non B-Class employment uses should not normally be permitted, unless a clear viability case can be made.
- For the Secondary Employment Sites, a more flexible approach could be taken to help facilitate a broad range of economic development. In some cases, a more intensive mixed-use development could provide greater benefit

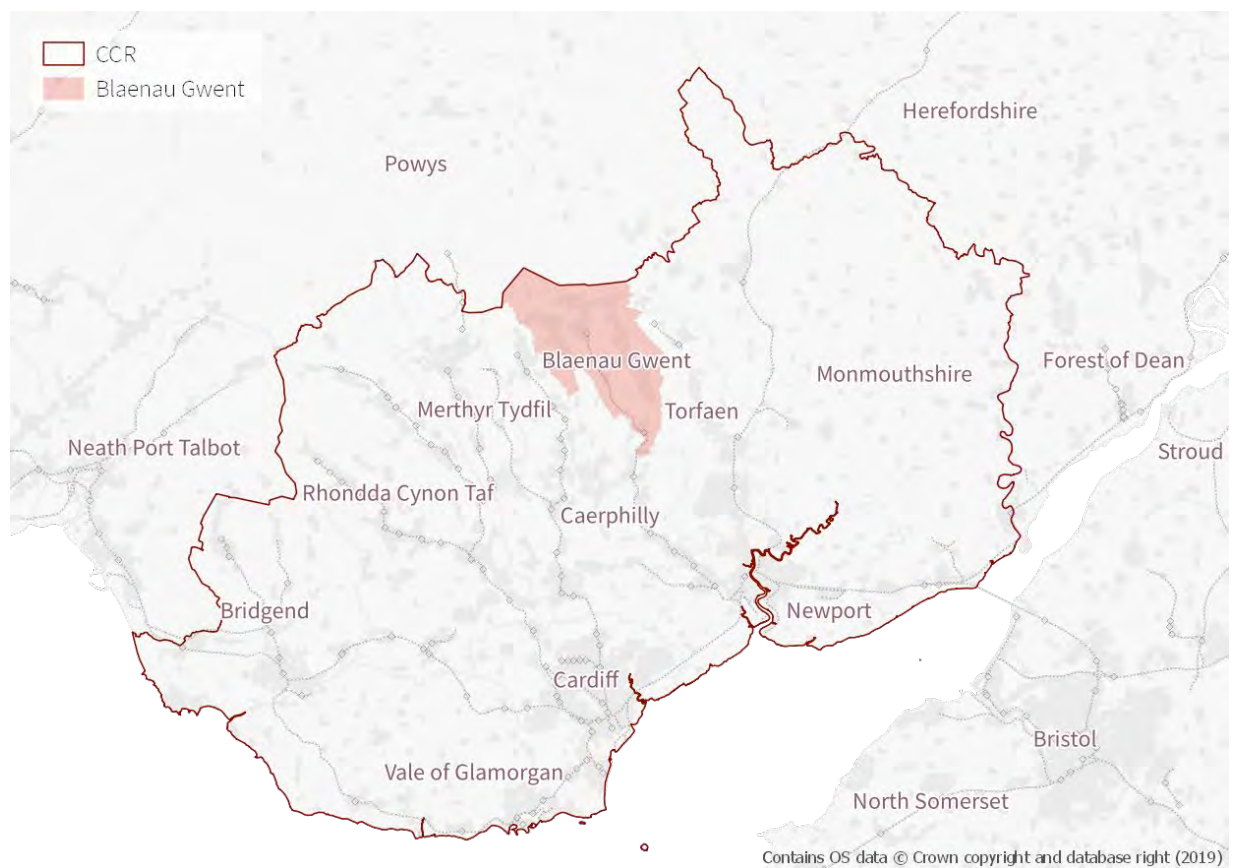
to the local community than if the site was retained solely in employment use. Subordinate complementary or supporting uses could be permitted where a vitality and viability case can be made.

- Employment development outside the identified Employment Areas contributes to local employment activity and jobs. Any consideration of future non-employment changes of use, in such locations, should be addressed in the same way as land in Secondary Employment Sites.
- TAN23 requires that sites should be fit for purpose and this means that they need to be deliverable. To achieve this, it is recommended that the Council and other relevant partners:
 - Have a disposal strategy in place for relevant Council owned land and premises
 - Work proactively with Welsh Government
 - Develop Delivery Strategies for Sites.
- The Council should work with neighbouring authorities on issues in which interests will overlap.
- Review and monitor the employment land and premises position and undertake this study again as part of the future Plan reviews, as 2033 is a long time in the future and much will happen before then.

1.0 INTRODUCTION

- 1.1 This report provides an Employment Land Review to support the Blaenau Gwent Replacement Local Development Plan (LDP). It has been carried out on behalf of Blaenau Gwent County Borough Council (the Council). Economic development and property consultants BE Group, Hatch Regeneris and Per Consulting compiled this report during May-August 2019.
- 1.2 The Study covers the entirety of Blaenau Gwent, a Welsh County Borough of 69,700 people located in the north of the Cardiff Capital Region (CCR) (see Figure 1).

Figure 1 - Blaenau Gwent and the Cardiff Capital Region (CCR)



Source: OS, Hatch Regeneris, 2019

Regional and Local Studies

- 1.3 The study links to, and is informed by, the Regional Employment Study for Torfaen, Blaenau Gwent, Monmouthshire, Caerphilly and Newport. That Study has been completed by BE Group, Hatch Regeneris and Per Consulting, over the same time period, “in order to understand the potential levels of strategic economic growth over

the replacement LDP's for Torfaen, Blaenau Gwent and Monmouthshire over the period 2018 - 2033 and to cover the period up to 2040 in relation to Caerphilly and Newport and the resultant implications of this in terms of future requirements for employment land provision."

- 1.4 This Local Employment Land Review will take forward the conclusions and recommendations of the regional employment study at a local level for Blaenau Gwent County Borough. A second Local Employment Land Review has also been prepared for Torfaen County Borough, using the same methodology, by the Study Team. BE Group is further completing a Local Employment Land Review for Monmouthshire County. Both the local and regional studies will be in conformity with each other.
- 1.5 This Local Employment Land Review updates previous employment land evidence base documents for the County Borough, notably the Employment Sites and Premises Study 2007. It reflects updated Welsh Government guidance contained within '*Building an Economic Development Evidence Base to Support a Local Development Plan*' (2015), '*Technical Advice Note 23: Economic Development (2014)*' and '*Planning Policy Wales (PPW) 10th Edition*' (2018).

Background

- 1.6 Blaenau Gwent (as well as Torfaen and Monmouthshire Councils) is in the process of preparing a replacement Local Development Plan, for the period 2018-2033. The proposed approach, timescales and consultation arrangements for the replacement Plans are set out in a Delivery Agreement for Blaenau Gwent which was agreed by the Welsh Government in 2018. The agreed timetables will see the replacement Plan for the County Borough being adopted at the very end of 2021/early 2022.
- 1.7 The replacement LDP will set out land use development proposals for Blaenau Gwent up to 2033. The replacement LDP will be informed by this Local Study and the Regional Study which will assess the employment growth that is expected over the plan period so that the consequential issues for housing and population can also be determined. The Local and Regional assessments will have regard to "*the wide-ranging issues facing the counties/ sub-region, including demographic, economic and social issues, as well as the wider contextual considerations across the region, including the ambitions and opportunities associated with the CCR City Deal.*"

Methodology

- 1.8 Research methods used include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations were undertaken with several of the County Borough's major private sector employers and key public-sector agencies, notably Welsh Government. Appendix 1 contains a list of all consultees. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken.
- 1.9 As noted, this Study is completed alongside the Regional Employment Study for Torfaen, Blaenau Gwent, Monmouthshire, Caerphilly and Newport. The research that study has undertaken on the regional economy, strategic land and premises supply and stakeholder engagement at the larger than local level is incorporated within this Study.
- 1.10 Condition of the 21 defined Employment Areas of the County Borough have been reviewed using quantitative and qualitative methods, reflecting Welsh Government Guidance, along with potential sites identified for B-Class use development, within the existing LDP.
- 1.11 Finally, the land supply has been assessed against forecasts of land need, as defined in Welsh Government Practice Guidance. This is then developed into a series of economic development recommendations that cover not just land, but also premises.

Welsh Employment Land Review Guidance

- 1.12 This study reflects Welsh Government guidance on how Local Authorities should approach employment land reviews, namely *'Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan'*. The employment land review process takes the form of a four-stage methodology under the following headings:
- **Stage 1: Property Market Assessment** – An analysis of demand in terms of specific market sectors, property requirements and geographical areas, focusing on the current situation and prospects for the LDP over its 15-year life cycle. Where there is demand for development and where there is not.
 - **Stage 2: Audit of Employment Sites** – The quantitative inventory and qualitative appraisal of local land supplies, including existing committed, allocated and potential employment sites and existing stock. This will feed

directly into the review’s conclusions on whether any further land should be identified for employment and whether any existing or committed employment sites should be transferred to other uses.

- **Stage 3: Future Land Requirements** – Establishing the LDP’s employment land requirement, using recognised forecast methods, primarily:
 - *“Method 1 – Past Building Completions Method 1 uses the average annual completions rate for B1, B2, and B8 employment land for a previous period in order to project future requirements over the life of the LDP.*
 - *Method 2 – Labour Demand Forecasting Method 2 involves acquiring employment growth forecast data for relevant Standard Industrial Classification activity sectors, assigning sectors to B-use classes and then converting jobs to floorspace.”*
- **Stage 4: Policy Options and Recommendations** – Identifying policy options and recommendations, based on review findings.

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

Table 1 – Employment Land Reviews – Practice Guidance

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

Stage 4: Assessment Review	
Step 1: Policy Options	8.0 Conclusions
Step 2: Policy Recommendations	9.0 Recommendations
Step 3: Monitoring and Recording	<i>Final reporting, including conclusions and policy/practice recommendations.</i>

Source: BE Group 2019

2.0 STRATEGIC CONTEXT

Introduction

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

Welsh Government

Consultation Draft: National Development Framework 2020-2040 – Welsh Government (2019)

- 2.2 The National Development Framework (NDF) is a 20-year plan for Wales up to 2040, which is at Consultation Draft Stage. It covers key areas such as the economy, where nationally significant developments should take place, where key growth areas are and what infrastructure and services are needed. The draft NDF sets out development policies for Wales as a whole and for the North Wales, Mid and South West Wales and South East Wales regions.
- 2.3 The NDF sets out 11 Outcomes of where it wishes Wales to be in 20 years' time. Number Five is that *“Cities and large towns are magnets for jobs and investment, while people are drawn to live and work there for the economic and social opportunities they provide.”* Number Six is that *“Development Plans will have a forward thinking, positive attitude towards enabling economic development, investment and innovation.”*
- 2.4 The NDF provides a Wales-wide Spatial Strategy which identifies ‘*Cardiff, Newport and the Valleys*’ as one of its three main urban clusters alongside Swansea Bay and Llanelli and Wrexham and Deeside. These locations should be the focus of large scale urban growth and a sequential approach should be taken for uses including public services.
- 2.5 In terms of the regions, Welsh Government requires each region to deliver a Strategic Development Plan which establish, amongst other things, strategic employment provision (Policy 16).

- 2.6 In South East Wales, Cardiff *“will retain and extend its role as the primary national centre for culture, sport, leisure, media, the night time economy and finance. The Welsh Government supports regional development which addresses the opportunities and challenges arising from Cardiff’s geographic location and its functions as a Capital City” (Policy 27).*
- 2.7 Newport will be a *“focus for regional growth and investment”*, playing *“an increased strategic role in the region”*. *“Strategic and Local Development Plans across the region should recognise Newport as a focus for strategic housing and economic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from Newport’s increased strategic regional role. Development in the wider region should be carefully managed to support Newport’s growth and to provide a focus for regional planning” (Policy 28).*
- 2.8 The Heads of the Valleys area, covering the northern parts of Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent and Torfaen, is a priority area for the Welsh Government. ‘Policy 29 – The Heads of the Valleys’ identifies that *“The Welsh Government supports co-ordinated regeneration and investment in the Heads of the Valleys area to increase prosperity and address social inequalities. The Welsh Government will work with local authorities, businesses, the third sector, agencies and stakeholders to support investment, including in the manufacturing sector, and to ensure a regional approach is taken to addressing issues in the Heads of the Valleys area. Strategic and Local Development Plans across the full region must identify how they can support, both directly and through a joined-up regional approach, the Heads of the Valleys area to deliver greater prosperity, support regeneration and improve well-being.”*

Planning Policy Wales, 10th Edition – Welsh Government (2018)

- 2.9 Planning Policy Wales (PPW) 10th Edition, sets out the land-use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs) which are discussed below. Together with several circulars and policy clarification letters, PPW and the TANs comprise the national planning policy for Wales. National planning policy, alongside the Wales Spatial Plan (discussed below) should be considered in the preparation of LDPs.
- 2.10 Chapter 5 ‘*Productive and Enterprising Places*’ of PPW 10 sets out national policies for economic development. For planning purposes, the Welsh Government defines

economic development as *“the development of land and buildings for activities that generate sustainable long term prosperity, jobs and incomes...”* *“Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism, and public services.”*

- 2.11 The document states the importance of the planning system supporting economic growth and ensuring that there is sufficient land to meet the needs of the employment market at both a strategic and local level. *“Development plans should identify employment land requirements, allocate an appropriate mix of sites to meet need and provide a framework for the protection of existing employment sites of strategic and local importance.”*
- 2.12 *“Wherever possible, planning authorities should encourage and support developments which generate economic prosperity and regeneration. Sites identified for employment use in a development plan should be protected from inappropriate development.”*
- 2.13 Plans and decisions need to be based on an up to date and locally/sub-regionally specific evidence base which demonstrates the *“suitability of the existing employment land supply as well as future provision in relation to the locational and development requirements of business.”* That evidence base should include an Employment Land Review (ELR).
- 2.14 *“Planning authorities should work with each other and with relevant economic fora in order to prepare an ELR. The review should include an assessment of anticipated employment change and land use together with estimates of land provision for employment uses showing net change in land/ floorspace. This should be calculated for offices, industrial and warehouse uses separately. This evidence should help inform an economic vision for the area. Employment Land Reviews should be kept up to date and relevant to prevailing market conditions and the needs of the development plan.”*
- 2.15 In addition, local planning authorities should steer economic development to the most appropriate locations, including provision of strategic scale sites, by:
- Coordinating development with infrastructure provision
 - Supporting national, regional and local economic policies/strategies

- Aligning jobs and services with housing (where possible) to reduce the need for travel, especially by car
 - Promote the re-use of previously developed, vacant and underused land
 - Delivering physical regeneration and employment opportunities to disadvantaged communities.
 - Control and manage the release of unwanted employment sites to other uses
 - Propose specific locations for locally and strategically important industries which are detrimental to amenity and may be a source of pollution
 - Identify protection zones around land and premises that hold hazardous substances and protect the ability of existing businesses to operate or expand by preventing the incremental development of vulnerable uses in the locality.
- 2.16 Innovative business and technology clusters may also be important to the economic growth of a local authority area. Development plan policies need to identify potential networks and cluster areas, and set policies for the creation of the transport, environmental and telecommunications infrastructure needed to support such networks. Planning authorities should also look favourably on any renewable and low carbon energy generation proposals designed to serve clusters.
- 2.17 New business creation is essential to sustain and improve rural economies. *“Many commercial and light manufacturing activities can be located in rural areas without causing unacceptable disturbance or other adverse effects. Small-scale enterprises have a vital role to play in the rural economy and contribute to both local and national competitiveness and prosperity.”*
- 2.18 Whilst some rural employment can be created through the re-use of buildings, new development may also be required. This new development should, where possible be within or adjacent to settlement boundaries and preferably close to public transport links. In addition, where businesses cannot be accommodated within settlements, appropriate small-scale rural enterprise should be permitted on unallocated land. The expansion of existing businesses located in open countryside should be supported provided there are no unacceptable impacts on local amenity.
- 2.19 *“Planning authorities should adopt a positive approach to diversification projects in rural areas... Whilst every effort should be made to locate diversification proposals so they are well-served by public transport, it is recognised that certain diversification*

proposals will only be accessible by car. While initial consideration should be given to adapting existing farm buildings, the provision of a sensitively designed new building on a working farm within existing farm complexes may be appropriate where a conversion opportunity does not exist.”

Technical Advice Notes – Welsh Government

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

TAN 6: Planning for Sustainable Rural Communities (2010)

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

Appropriate uses at such locations could include food and timber processing and packing, services (offices, workshop facilities, equipment hire and maintenance), sports and recreation services, the production of non-food crops and renewable energy.

TAN 23: Economic Development (2014)

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

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

future economic scenarios are surrounded by a large margin of uncertainty, and often more so for individual authorities than for larger areas. Modelling may be most successful when based on functional economic areas such as travel to work areas and housing market areas.”

- 2.37 Where projected local authority growth differs markedly from that expected for the wider region, *“the authority should provide an evidence-based justification for these differences, much as they would have to in respect of population projections for their area.”* Predicted employment figures should usually be expressed as a range of scenarios to reflect different economic outcomes and policy options. Ultimately however, *“the level of growth envisaged must be realistic, able to withstand scrutiny and be consistent with the other aspirations of the plan including population and housing projections.”*
- 2.38 Finally, the TAN highlights that existing employment sites should only be released for other uses if:
- *“They have poor prospects of being re-occupied for their previous use;*
 - *And/or the particular market that the site is part of is oversupplied;*
 - *And/or the existing employment use has unacceptable adverse impacts on amenity or the environment;*
 - *And the proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained;*
 - *Or other priorities, such as housing need, override more narrowly focused economic considerations.”*

Prosperity for All: Economic Action Plan – Welsh Government (2017)

- 2.39 The purpose of the Economic Action Plan launched in December 2017 is to support the delivery of Prosperity for All – the national strategy for Wales. The Plan sets out a vision for inclusive growth, built on ‘supercharged industries of the future’ and productive regions. The Plan supports the twin goals of growing the economy and reducing inequality. It simplifies the Government approach to sector prioritisation, recognising that traditional sector boundaries are increasingly blurred and identifying three thematic sectors for proactive government support:
- Tradable Services (e.g. fintech services and online insurance)
 - High Value Manufacturing (e.g. compound semiconductors and new composites manufacturing)

- Enablers (e.g. digital, energy efficiency, renewables).

2.40 The plan also recognises the importance of Foundation Sectors - tourism, food, retail and care – committing to develop cross-government enabling plans to maximise impact.

Tech Valleys Strategic Plan – Welsh Government (2018)

2.41 In 2017, plans were announced to develop an automotive technology park in Ebbw Vale. Tech Valleys is a natural progression of the automotive technology park concept – an extension of the vision to encompass a broader range of technologies, applications and opportunities.

2.42 Tech Valleys is an ongoing programme of infrastructure improvements that will significantly reduce the physical and perceived isolation of many of the Valley communities.

2.43 The vision for the Tech Valleys is that: *“In 2027 the South Wales Valleys, and Blaenau Gwent in particular, will be a globally recognised centre for the development of new technologies, to support cutting edge industry.”*

2.44 The vision for Tech Valleys outlines the intention to build a new economy in the Blaenau Gwent area, based on new, cutting edge technologies and crucially, creating 1,500 new jobs over a ten-year period. Overall, up to 2,748 jobs will be created, with £16 million of net benefits, when indirect jobs and those induced by the investment in Blaenau Gwent are taken into consideration. The vision outlines the importance of collaboration between business, public sector and academia and the need for targeted investment.

2.45 Investment in infrastructure, and in particular in the quality and availability of digital connectivity in Blaenau Gwent, will continue to improve the links across the region, to enhance the ability of technology companies to conduct business and to facilitate the movement of goods and people in support of Tech Valleys. The plan also recommends capital revenue funding for composite training at Coleg Gwent.

Cardiff Capital Region

Priority Sectors – CCR

- 2.46 CCR prioritises five sectors for employment and skills support, which largely overlap with some of the sectors prioritised by the Welsh Government:
- Advanced Materials and Manufacturing
 - Construction
 - Financial, Legal & Professional Services
 - ICT/Digital - including creative industries
 - Human Foundational Economy.

City Deal

- 2.47 The CCR has secured a £1.2 billion City Deal with the UK and Welsh Governments. A key priority for investment will be the delivery of the South East Wales Metro, including the Valley Lines Electrification programme. CCR Region has established the CCR Transport Authority (CCRTA) to co-ordinate transport planning and investment within the region, in partnership with the Welsh Government.
- 2.48 With the City Deal, CCR expressed its commitment to develop a skilled workforce and tackle unemployment, while also supporting enterprise and business growth. An Economic Growth Partnership has been established to commission an Economic Growth Plan for the next twenty-year period. A Regional Business Council has also been established to engage with all businesses and articulate their needs. As part of the City Deal, £37.9 million are invested to support the development of a compound semiconductor industry cluster in south-east Wales.
- 2.49 With regards to housing and regeneration, through the Deal, the Welsh Government and the CCR commit to a new partnership approach to strategic planning. A Regional Housing Investment Fund has also been established to support house building, which will also help stimulate the SME building sector across the region by providing loan development finance and through a Custom Build Scheme.
- 2.50 Over its lifetime, the City Deal is expected to deliver up to 25,000 new jobs, leverage an additional £4bn of private sector investment and deliver a 5% uplift in Gross Value Added (GVA). In February 2018, three development strategies were agreed by the CCR cabinet to support the strategic themes of housing, skills, and digital connectivity within CCR and drive the City Deal forward.
- 2.51 The City Deal is also supported by a five-year strategic business plan, which sets out

the required actions and outcomes to achieve CCR's long-term objectives, including details of how the Wider Investment Fund can be used in the next 5 years to act as a catalyst to drive the actions forward.

Employment and Skills Plan - Employment and Skills Board of the Learning, Skills and Innovation Partnership (2017)

2.52 The latest Employment and Skills plan for CCR identifies the need to develop a demand-led system that is driven by the needs of the industry and which delivers employment and skills support in response to infrastructure and other investments to achieve growth within the regional economy.

2.53 According to the plan the key regional priorities for employment and skills include objectives such as:

- Promoting digital skills and high value skills, and reversing falling numbers in STEM and computer related subjects;
- Promoting strategic leadership and management skills;
- Promoting 'train the trainer' programme to develop the capacity and capability of education providers;
- 'People and personal skills' programmes for soft and essential skills such as numeracy, literacy and ICT;
- Developing higher level skills to future-proof the workforce;
- Increasing the number and range of apprenticeships;
- Delivering employment and skills support for the industry, infrastructure and other investments to enable growth by creating through regional academies or centres of excellence and other institutions;
- Developing succession plans for European Union funded programmes post-Brexit-risk assessment and to support services offered through local and regional ESF operations.

Powering the Welsh Economy, Cardiff City Region – CCR Board (2015)

2.54 The report provides advice to the Welsh Government on how best to provide the leadership, vision and strategic direction for CCR. It identifies the following four priority themes:

- *Connectivity*: delivering an integrated infrastructure which allows an effective, efficient and sustainable movement of people, goods and information, regionally, nationally and internationally.

- *Skills*: CCR and its people to be recognised globally for having the skills that meet the needs of local businesses and communities.
- *Innovation and growth*: supporting a thriving business community with international recognition, driven by an entrepreneurial culture and leading academic research.
- *Identity*: building a vibrant and internationally recognised CCR synonymous with quality of life.

2.55 The report recommends close collaboration between overlap of sectors and administrative boundary such as Swansea, Bristol and rest of the Wales, particularly around harnessing marine resources. It also recommends alignment of the priority sectors to universities and colleges, as exemplified by the “trader training” at the Cardiff Business School.

Local

Local Development Plan up to 2021 – Blaenau Gwent CBC (2012)

2.56 In economic terms the LDP acknowledges the structural change in the local economy moving from the dependence on heavy industry that historically dominated the local economy, towards manufacturing and services. It also identifies the scale of changes within the global economy have resulted in the transfer of operations to many of the lower cost centres around the world, a trend common to Blaenau Gwent, Wales. There has also been failure to attract large levels of high-tech sectors. This trend is of considerable local concern in terms of the loss of economic activity, the scale of job losses and also in terms of employment land implications that might arise from this level of change.

2.57 The LDP sets out detailed policies and specific proposals for the development and use of land in Blaenau Gwent by 2021. With an understanding of the challenges the area faces, a vision of what the area should look like in 15 years has been developed and will guide the future development of Blaenau Gwent. The vision is:

“Through collaborative working, by 2021, Blaenau Gwent will become a network of sustainable, vibrant valley communities, where people have the skills, knowledge and opportunities to achieve a better quality of life and residents will live in safe, healthy and thriving communities, with access to a range of good quality affordable homes

and thriving town centres. Its unique environment, cultural and historic identity will be protected and enhanced to create a place where people want to live, work and visit.”

2.58 The vision has been broken down into four key themes, under which sixteen objectives have been identified to address the challenges faced. Relevant themes include:

Theme 2: Create Opportunities for Sustainable Economic Growth and Promote Learning and Skills

2.59 There are four objectives set out for this theme, namely:

- The completion (by 2021) of regeneration plans for the ‘The Works’, Ebbw Vale Northern Corridor and other key regeneration sites
- The development of 50 ha of land for employment, and a range of premises, with the aim to increase employment and activity rates in the community and decrease unemployment rates.
- The economic base will also have been diversified into construction, business services, health and social care, tourism and leisure and environmental industries, whilst supporting the manufacturing sector.
- Finally, Learning Zones will be implemented to improve and broaden opportunities for education levels and skills.

Northern Strategy Area – Growth and Regeneration

2.60 The Northern Strategy area includes the three hub areas of Tredegar, Ebbw Vale and Upper Ebbw Fach. *“The emphasis is on sustainable growth and regeneration with most of the growth concentrated in the principal hub area of Ebbw Vale.”* Key sites within the Northern Strategy Area include:

Ebbw Vale Northern Corridor including:

- *“A Strategic Employment site – the 13.2 ha MU1: Rhyd-y-Blew Site plus a further 10.0 ha at MU1: Bryn Serth*
- *Employment and Roadside Services*
- *A Commercial Leisure hub*
- *700 Homes.”*

‘The Works’ including:

- *“A Local General Hospital*

- *Business Park of 3.5 ha*
- *Learning Zone*
- *Leisure Centre*
- *Arts Centre*
- *Approximately 520 Homes.”*

2.61 In ‘*Policy SP1: Northern Strategy Area – Sustainable Growth and Regeneration*’ policy will be:

- *“a. Supporting the creation of a network of sustainable hubs around the principal hub of Ebbw Vale*
- *b. Promoting Ebbw Vale as the principal hub for Blaenau Gwent, where the majority of social and economic growth will be accommodated including major retail expansion, administrative and cultural developments.*
- *c. delivering strategic sustainable regeneration flagship schemes at ‘The Works’ and ‘Ebbw Vale Northern Corridor’*
- *e. Enabling diversification of the economic base through mixed-use development in the district hubs of Tredegar and Brynmawr where it supports and reinforces the roles of the town centres.”*

2.62 In terms of employment land, 48 ha in 12 sites is allocated in locations across Ebbw Vale, Tredegar and Upper Ebbw Fach.

Southern Strategy Area - Regeneration

2.63 The Southern Strategy area covers the Lower Ebbw Fach Valley. *“The focus will be on regenerating the area and maximising the potential offered by the area’s unique setting and cultural qualities. The southern area differs from the north due to the topography of the area. In this area the valley narrows, and the valley sides become steeper. The settlements cling to the valley sides.”* In terms of employment, 2 ha plus of land is allocated at Roseheyworth Business Park.

2.64 ‘*Policy SP8: Sustainable economic growth*’ notes that in order to increase economic activity, diversify the economy and ensure that residents of Blaenau Gwent maximise their economic potential, 50 ha of land will be allocated to meet economic development and employment needs. Additionally:

- “a. the employment rolls of major industrial areas will be identified to assist in the diversification of employment and to support the sustainable development of manufacturing
- d. rural enterprise and activity tourism will be promoted in the countryside.”

2.65 Policy EMP1 allocates 50 ha of employment land in 13 sites, which are reviewed further in Section 6.0. Policy EMP2 protects 21 employment areas for B-Class uses. Again, these are reviewed in Section 6.0. Both follow a hierarchy and level of protection set out in ‘Policy DM10 Use Class Restrictions – Employment’ which is that:

- On sites allocated as Strategic Sites, development will only be permitted if it is within use class B1 and B2, or to provide an ancillary facility or service to the proposed employment use
- On sites allocated or identified as Business Parks development will only be permitted if it is within use class B1, or to provide an ancillary facility or service to the proposed employment use.
- On sites allocated or identified as Primary Sites, development will only be permitted if it is within use classes B1, B2, B8 or an appropriate Sui Generis use, to provide an ancillary facility or service to the existing and proposed employment use
- On sites allocated or identified as Secondary Sites, development will only be permitted if it is within use classes B1, B2, B8, an appropriate Sui generis use, to provide an ancillary facility or service to the existing and proposed employment use or an acceptable commercial service.

Local Development Plan (2012-2021) Review Report – Blaenau Gwent CBC (2017)

2.66 According to the review, by 2017 the following had been delivered:

- The only site to have been developed to date is the ‘Regain building’, located on ‘The Works’ site. This building provides 500 sqm of office space and 0.18 ha of developed land
- A further 3.6 ha of new employment floorspace has also been delivered elsewhere in the form of extensions and new industrial units at existing employment sites

2.67 The amount of employment land delivered since the start of the plan has not been sufficient to meet requirements. The target to deliver 23.8 ha of employment land by

2016 was missed and it appears that it is very unlikely that the target to deliver 50 ha by 2021 will be achieved.

- 2.68 There are several positive contextual changes that have the potential to be a catalyst for economic development within the County Borough, including the CCR City Deal, the South East Wales Metro, Enterprise Zone, and the ongoing dualling of the A465. However, despite these public sector led opportunities, all underdeveloped sites should be reassessed as part of the preparation of a replacement LDP to ensure they are deliverable over an extended plan period. An overall assessment of the supply of employment land will also need to form part of this work.

Employment Land and Premises Study – Blaenau Gwent CBC (2007)

- 2.69 This report assesses the quantity, quality and viability of employment sites and premises in Blaenau Gwent County Borough. It helps to provide evidence for the preparation of the local planning authorities' development plans.
- 2.70 In terms of employment land, the study reviewed both Employment Land Allocations (ELA) and existing industrial and commercial areas. These were grouped into 14 clusters covering 450 ha of land. Surveying identified that the majority of employment clusters (84 percent) were in good condition in terms of building condition and quality of environment. The vast majority (94 percent) were also considered to have good or very good access to the strategic road network. Accessibility for the then ELAs was weaker although this is less of an issue for the mostly industrial uses likely to occupy such land.
- 2.71 A market assessment was conducted by Cooke and Arkwright which suggested a move from dependency on traditional primary industries to a more diverse industrial base. Infrastructure improvements, land reclamation and advanced factory programmes have created sustainable employment through state aid and EU funding. Demand at this time was for small workshops of 139-500 sqm, however needs were expected to be met at planned development Rassau and Cwmcraehen. A limited development of small campus-style offices at Victoria or Tredegar Business Park may be viable with grant support.
- 2.72 Forecasted demand was calculated for the period 2005 – 2021 through floorspace and employment forecasts to estimate changes in land for office, factory and warehouse uses (Table 2).

Table 2 – Forecasted Changes in Employment Land Demand 2005-2021

	Net Demand in employment land by 2021	Total Stock of Floorspace Demanded in 2021	Net Demand in Floorspace by 2021	Net Demand in Employment Land by 2021	
	Sqm	Sqm	Sqm	Sqm	Hectares
Office (B1)	38,667	46,688	10,256	31,558	3.2
Factories (B2)	452,400	399,791	(52,609)	(131,523)	13.2
Warehouses (B8)	88,833	96,492	7,659	15,317	1.5
Total	579,900	542,970	(34,694)	(84,647)	(8.5)

Source: Blaenau Gwent CBC, 2007

- 2.73 It was noted that additional factors may contribute to employment growth such as the new train line, anticipated relocations and EU funding. A buffer of 50 percent on demand in floorspace/land to 2021 was calculated (Table 3).

Table 3 – Forecasted Changes in Employment Land Demand 2005-2021: Based on extra 50 percent growth rates

	Net Demand in employment land by 2021	Total Stock of Floorspace Demanded in 2021	Net Demand in Floorspace by 2021	Net Demand in Employment Land by 2021	
	Sqm	Sqm	Sqm	Sqm	Hectares
Office (B1)	38,667	52,045	15,385	47,337	4.7
Factories (B2)	452,400	426,095	(26, 305)	(65,761)	(6.6)
Warehouses (B8)	88,833	98,217	9,384	18,767	1.9
Total	579,900	576,357	(1,536)	343	0.03

Source: Blaenau Gwent CBC, 2007

- 2.74 Research identified a surplus amount of ELA within Blaenau Gwent. Recommendations were made for parcels of land that could be de-designated from employment uses, and also potential locations for the growth and B1 and B8 uses. A total of 56.19 ha has been deemed unsuitable as employment land. To meet the modest net B8 need identified it recommended new allocations on the Valleys Road, subject to appropriate infrastructure investment. New offices should be accommodated at what is now 'The Works'.

Enterprise Zone (Informed by the Ebbw Vale Enterprise Zone Strategic Plan 2018 – 2021)

- 2.75 The Welsh Government has eight Enterprise Zones located around Wales. These are areas designated for business support, offering bespoke space, a range of financial incentives, and promoting specialist skills and sectors associated with the local area.
- 2.76 The initiative is intended to offer specific incentives to attract new business to locations in Wales. Locations include Ebbw Vale, where the new EZ focuses on the Advanced Manufacturing sector under the management of a Strategic Advisory Group.
- 2.77 The vision for the Ebbw Vale Enterprise Zone is that the location will be “*a vibrant; world class high technology hotspot for Welsh based manufacturing companies of all sizes spanning many key sub sectors, providing employment that is challenging, rewarding and valued.*”
- 2.78 The overall goals of the Enterprise Zone are to support the improvement of infrastructure links and development of some 41,800 sqm of new industrial /commercial floor space, which could generate up to £20 million of private sector investment and accommodate 1,500 jobs (previously 1,000 jobs).
- 2.79 Recorded achievements to date include:
- A465 Brynmawr - Tredegar dual carriageway programme – £158 million
 - The development of an £11.5m extension of the railway line from Parkway to The Works site Ebbw Vale, providing direct rail access to the Zone, was completed and the new station opened in May 2015.
 - Business Rates Relief – £1.3 million to 28 businesses
 - 38 enquiries received, with 3,000+ potential jobs
 - Aspire Shared Apprenticeship Scheme with – 68 individuals, 20 companies, 14 graduates
 - An Employment Liaison Project (ELP) has been developed as a mechanism for addressing both existing indigenous employer skills and recruitment needs and those of any new inward investors. So far it has benefitted – 55 companies and 387 individuals, facilitating 40 full time jobs 379 training referrals, 237 training places
 - Property Improvement Grants – the Rassau Estate Property Improvement

Recyclable Loans Scheme, which will provide interest free loans to companies on the Rassau Industrial Estate to support them to improve the external fabric of their units. The scheme encourages companies on the Rassau Estate to improve the physical appearance of their units to enhance the overall appeal of the region to visitors (including potential new investors) and residents

- 204 jobs have been created either through direct financial support or through wider assistance from the Welsh Government, with a further 101 safeguarded and 144 assisted
- The Board commissioned studies into the availability of property facilities within Blaenau Gwent and the wider South East Wales region. Reports in 2014 and 2017 showed that there is little available property, and that which is available are dated and unappealing to investors. The Board supported the release of constrained units by cofunding the works required to return these properties to market. The properties have since been let, creating employment and showing a return on investment of 70 percent.

2.80 In the future the Enterprise Zone will be under the Tech Valleys Advisory Board, with the goal that, *“by 2027, the South Wales Valleys and Blaenau Gwent in particular, will be a globally recognised centre for the development of new technologies to support cutting edge industry. Wales will be internationally recognised as a leading location for the development and delivery of emerging technologies, particularly within the automotive sector.”*

2.81 Building on the work of the Strategic Advisory Group, the programme will be delivered through a portfolio of related and complementary projects, as well as inward investment, over the short, medium and long term.

2.82 Likely investment in innovative areas include the development and testing of battery and motor technology, 5G activity, and the infrastructure needed for automated and ultra-low emission vehicles.

2.83 Physically the Enterprise Zone extends across eight employment areas in the Northern Strategy Area of Ebbw Vale, Bryn Serth, Tredegar and the A465 Heads of the Valleys Road. The focus of activity is at Rhyd-y-Blew, Bryn Serth, The Works and Rassau Industrial Estate.

- 2.84 Good progress has been made with site preparation works across the Zone. Utility and infrastructure works have been completed at Rhyd y Blew. The Welsh Government is progressing discussions with TVR Automotive on its preferred location for assembly of its cars in Wales, centred on the Ebbw Vale Enterprise Zone. It is envisaged that small volume production of cars will begin with approximately 2,000 cars/year creating around 150 new jobs as well as impacting positively on the local supply chain.
- 2.85 Several property options are being developed around Rhyd-y-Blew/The Works and these are discussed further in Section 6.0. Other projects include the Rassau Tafarnbach Business Improvement District and the Renewable Energy Centre, a proposal to build a renewable energy centre on Rassau Industrial Estate on the land around TechBoard. Additionally, the Future Proof Skills Hub and make space, a Skills development facility. It is also proposed for a mix of lab space, maker space and some shared facilities such as offices, meeting space, CAD, toolroom facilities etc.
- 2.86 *“TVR is in discussion with Blaenau Gwent County Borough Council to be the first tenant in the Future Proof Skills Hub at ‘The Works’. This Hub will work in partnership with Further and Higher Education to provide the training and support for business to continue to innovate and meet the trends and development in manufacturing, such as Industry It will also provide a mechanism to move research out of universities and help get it transferred into industry. It is intended that this facility will also host some flexible maker space. This will allow business to pilot their operations whilst main facilities are established. TVR is interested with regard to creating a small volume production facility to allow the company to begin pre-production trials and initial training of staff.”*

Summary

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

economy, i.e. small and large businesses, offices and industrial, high and low quality operations throughout the Plan period. All of these issues are pertinent points of consideration within TAN 6 and TAN 23, whilst TAN 21 requires local authorities to support the provision of a sustainable network of waste management facilities and recognises that many waste facilities can be suitably located on industrial estates.

2.88 The CCR, covering the ten unitary authorities of South East Wales, is a key arena of governance in Wales. The CCR prioritises five sectors for employment and skills support, which largely overlap with the sectors prioritised by the Welsh Government:

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

2.89 The Cardiff Capital Region is now the subject of a City Deal providing for £1.28 billion of infrastructure investment, including the South East Wales Metro, which incorporates the Valley Lines capacity improvements such as the proposed electrification programme and proposals for a new station at Abertillery. Over its lifetime, the City Deal is expected to deliver up to 25,000 new jobs, leverage an additional £4 billion of private sector investment and deliver a 5 percent uplift in Gross Value Added (GVA).

2.90 In economic terms the current LDP acknowledges the structural change in the local economy moving from the dependence on heavy industry that historically dominated the local economy, towards manufacturing and services. It also identifies the scale of changes within the global economy have resulted in the transfer of operations to many of the lower cost centres around the world, a trend common to Blaenau Gwent, Wales. There has also been failure to attract large levels of high-tech sectors. This trend is of considerable local concern in terms of the loss of economic activity, the scale of job losses and also in terms of employment land implications that might arise from this level of change.

2.91 The LDP seeks to focus growth in the Northern Strategy area including the three hub areas of Tredegar, Ebbw Vale and Upper Ebbw Fach. 50 ha of employment land in 13 sites is allocated under a defined hierarchy of sites.

- 2.92 The previous Employment Land and Premises Study identified only modest needs of some 4.7 ha of B1 office land and 1.9 ha of B8 warehousing. However, this evidence is now some 12 years old and will no longer reflect market conditions.
- 2.93 Ebbw Vale is an identified Enterprise Zone for Wales, with a focus on Advanced Manufacturing. The overall goals of the Enterprise Zone are to support the improvement of infrastructure links and development of some 41,800 sqm of new industrial /commercial floor space, which could generate up to £20 million of private sector investment and accommodate 1,500 jobs (previously 1,000 jobs). Overall, up to 2,748 jobs will be created, with £16 million of net benefits, when indirect jobs and those induced by the investment in Blaenau Gwent are taken into consideration.
- 2.94 The Ebbw Vale Enterprise Zone is now being progressed by the Tech Valleys Advisory Board, as a new hub for the centre of cutting-edge technologies, particularly in the automotive sector. This is discussed further in Section 6.0 and elsewhere. Physically the Enterprise Zone extends across eight employment areas in the Northern Strategy Area. The focus of activity is at Rhyd-y-Blew, Bryn Serth, The Works and Rassau Industrial Estate.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

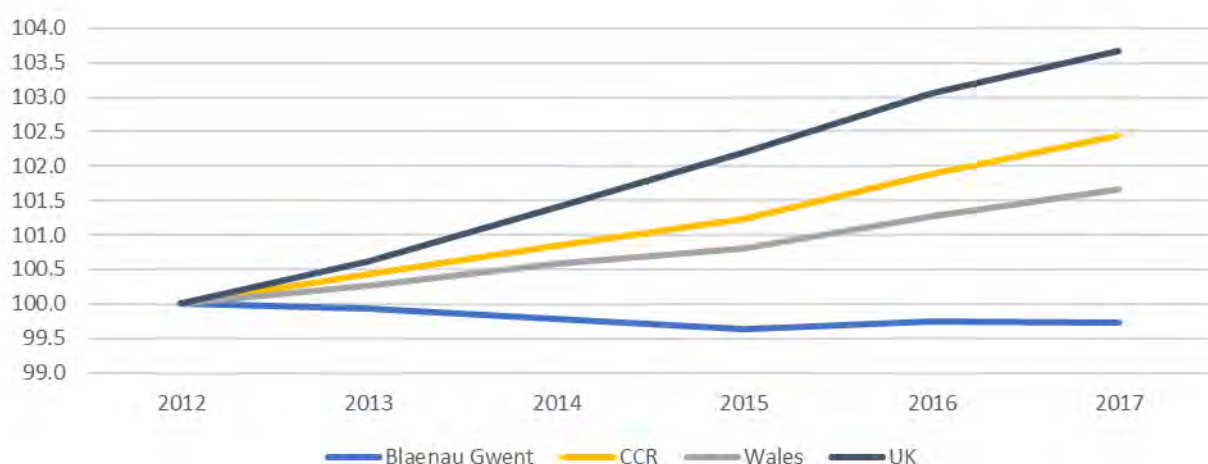
3.1 It is important to understand the nature of the economy in Blaenau Gwent County Borough to provide suitable employment opportunities to facilitate sustainable growth. For example, there is a need to provide employment land close to existing concentrations of businesses, in regeneration areas or in areas where companies want to locate.

3.2 This section considers the size of the economy, the jobs base and forecast jobs growth. By appreciating these aspects, it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together several existing data sources. It also uses demographic data to inform future requirements.

Demographics

3.3 Blaenau Gwent is home to 69,700 people (5 percent of CCR) and supports 18,640 jobs (3 percent of CCR). Over the last five years, Blaenau Gwent's population has declined by about 200 people (-0.3 percent), with a steeper decrease between 2012 and 2015 and a slight recovery between 2015 and 2016. This decline contrasts with the 3.7 percent growth for the UK and the growth above Welsh average observed in the wider City Region (2.4 percent) (Figure 2).

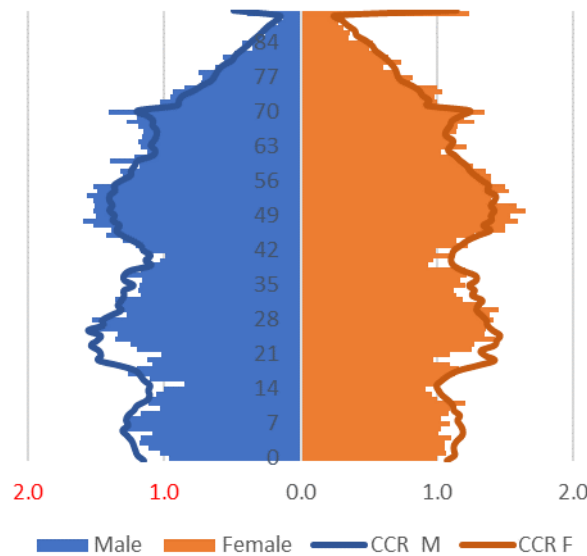
Figure 2 – Indexed Population Growth 2012-2017 (2012=100)



Source: ONS, Population Estimates (2019)

3.4 The Population age structure of Blaenau Gwent is illustrated in Figure 3. The age structure shows a slightly lower proportion of people in their early 20s compared to CCR as a whole (7 percent vs 9 percent in CCR), and a higher proportion of people aged 45 plus (48 percent vs 44 percent in CCR).

Figure 3 – Population Age Structure 2017 - Blaenau Gwent vs CCR



Source: ONS, Population Estimates (2019)

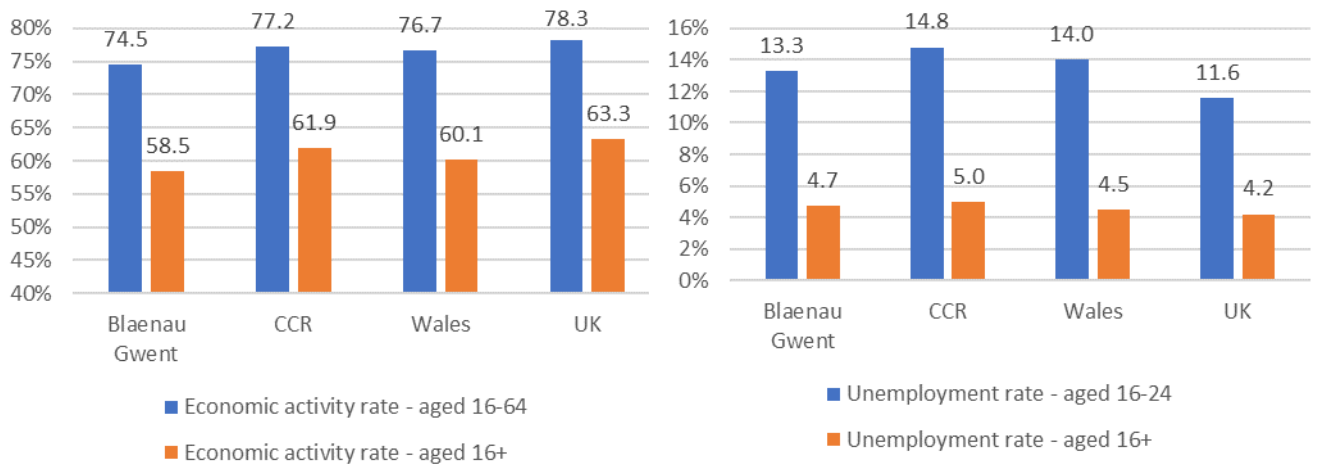
3.5 There are 43,700 people in the working age group (16-64 years old), making up 63 percent of the total population – a share in line with the UK and CCR averages.

Labour Market and Skills

3.6 Economic activity rate for the working age group in Blaenau Gwent is at 74.5 percent, below the UK (78.3 percent), Wales (76.7 percent) and CCR (77.2 percent) averages. A similar variation from the national and regional averages is observed for the aged 16-24 group, who will just be entering employment (see Figure 4).

3.7 Blaenau Gwent’s unemployment rate (amongst those aged 16+) is at 4.7 percent, slightly higher than national (4.5 percent) and country (4.2 percent) levels but below the city region level (5 percent) (see Figure 4).

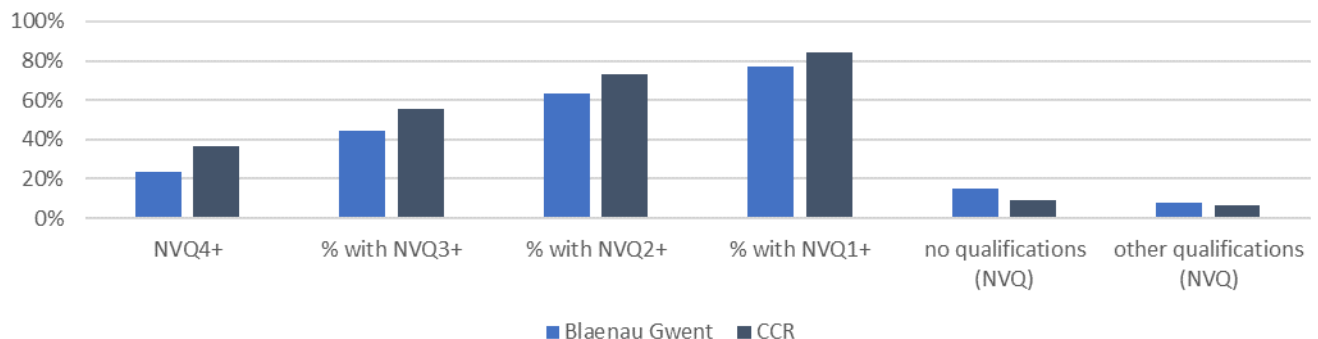
Figure 4 – Economic Activity and Unemployment 2018



Source: ONS, APS Jan 2018-Dec 2018

3.8 The qualification profile of Blaenau Gwent indicates that the proportion of residents educated at degree level and above is 13 percent below the City Region average (24 percent vs 37 percent in CCR), while the level of ‘no qualifications’ is above average, at 15 percent vs 9 percent in CCR (see Figure 5).

Figure 5 - Qualification Profile 2018

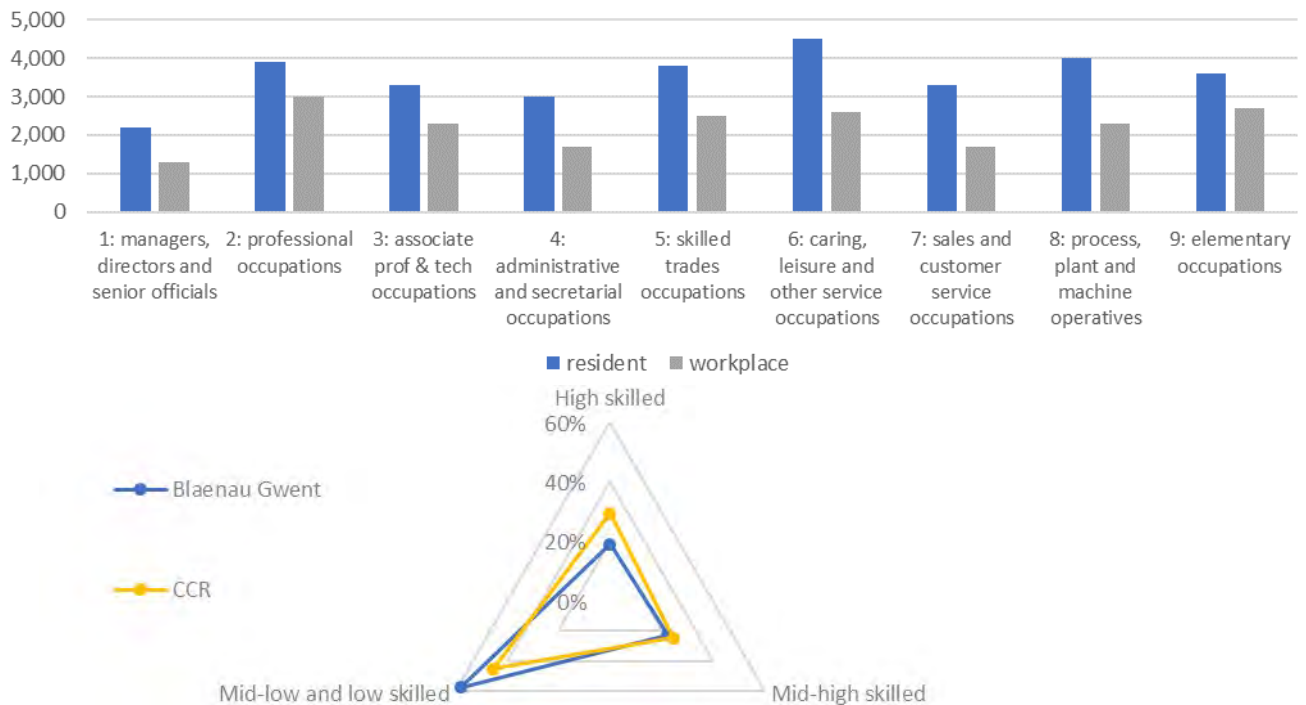


Source: ONS, APS Jan 2018-Dec 2018

3.9 Figure 6 compares the distribution of occupations across Blaenau Gwent’s residents against the distribution of occupations provided by jobs in the local authority (labelled workplace). Firstly, there are more residents in employment across all occupational groups than workplaces locally, indicating that a share of the resident population is finding employment outside Blaenau Gwent, with the largest gaps in Caring and Leisure and Process/Plant and Machine Operatives occupations. Secondly, a large share of residents is employed in mid-low and low skilled occupations, such as administrative, sales, caring, and process (58 percent, higher than the share for CCR

45 percent). Conversely, the level of residents employed in high-skilled occupations is at 19 percent, below the City Region average of 30 percent.

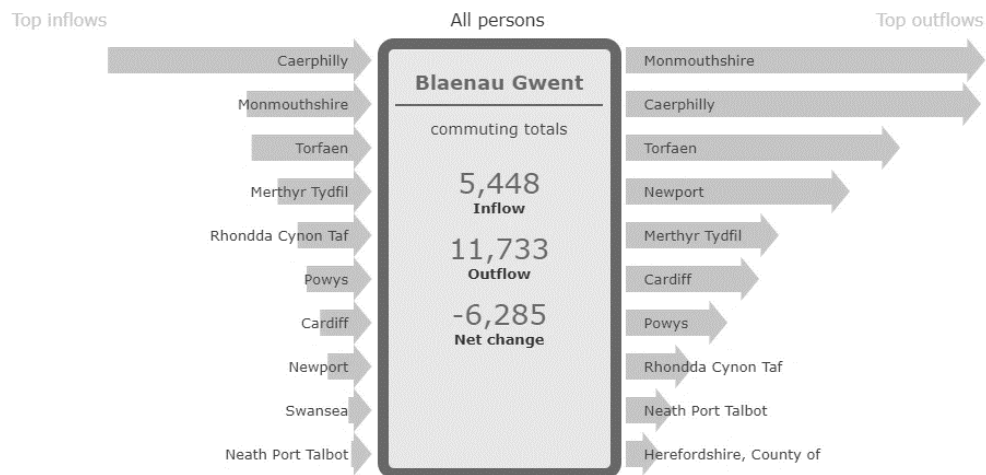
Figure 6 – Blaenau Gwent’s Occupational Distribution 2018 and Resident Skills level against CCR structure



Source: ONS, APS Jan 2018-Dec 2018

3.10 The imbalance between number of jobs and number of residents in employment observed above can be further detailed by looking at commuting flow patterns for Blaenau Gwent, which give an indication of where residents are likely to commute to work. The analysis of flows based on Census 2011 data confirms that a large share of Blaenau Gwent residents work outside the local authority, with 52 percent of residents in employment working in Blaenau Gwent. Figure 7 below maps out the commuting flows in and out of Blaenau Gwent, listing the top ten destinations of Blaenau Gwent out-commuters and top ten origins of in-commuters. Monmouthshire, Caerphilly and Torfaen account for over half of both total outflow (53 percent) and total inflow (57 percent). Overall the total commuting outflow is more than twice the total commuting inflow.

Figure 7 – Origin and destination of commuting flows for Blaenau Gwent



Commuting totals for Blaenau Gwent:

- Inflow: 5,448 all persons commute into Blaenau Gwent from other local authorities in the UK.
- Outflow: 11,733 all persons commute out of Blaenau Gwent to other local authorities in the UK or abroad.
- Net change: Overall, commuting results in a population decrease of 6,285 all persons in Blaenau Gwent.

Source: ONS, Census 2011

Migration

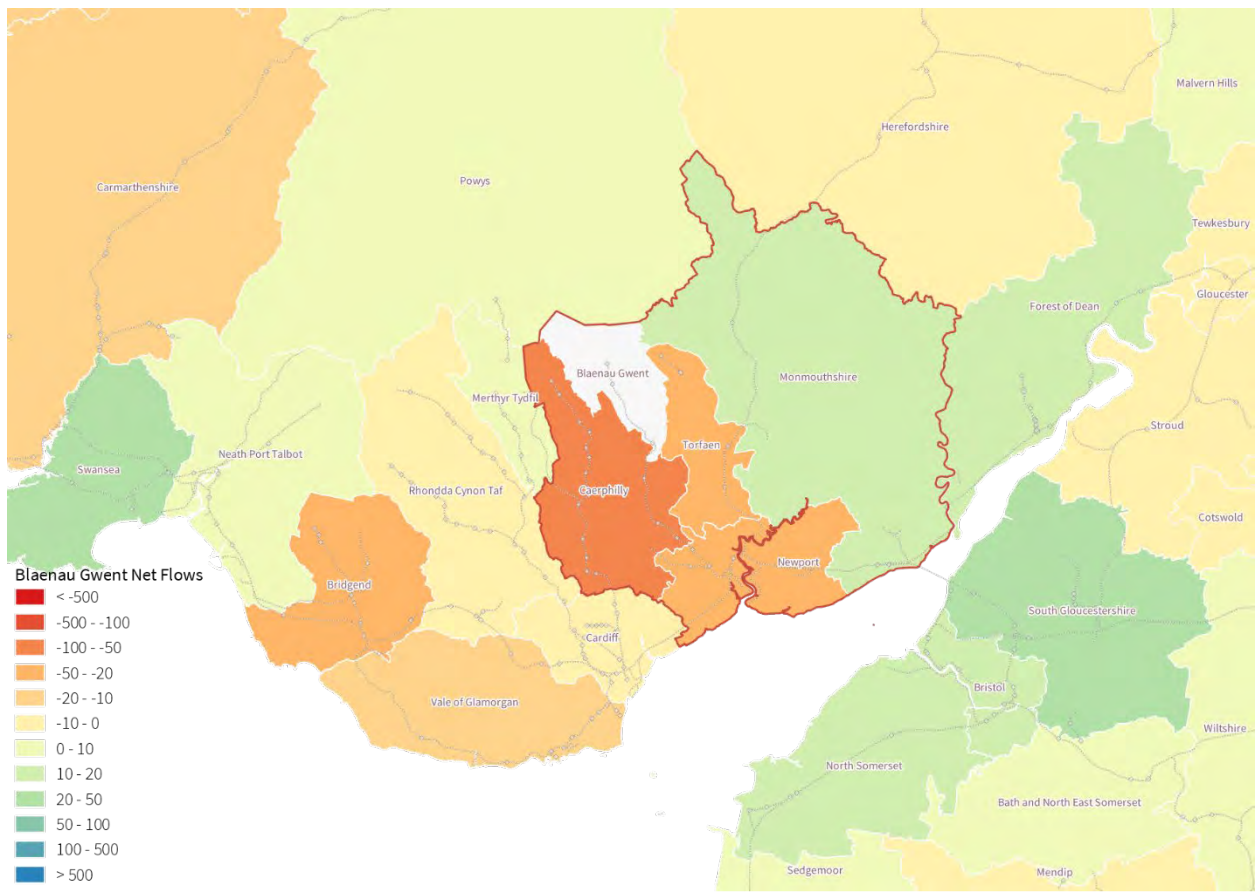
3.11 The analysis of migration patterns (housing moves between local authorities – not international) gives an indication of the strength of the relationship between local authorities’ housing markets. Figure 8 below illustrates the net flows between Blaenau Gwent and other local authorities, where a negative figure (yellow to red) indicates that a given local authority has more people moving in from Blaenau Gwent than vice versa. In 2017, there was a net negative flow to Caerphilly, Newport and Torfaen, while more people moved from Monmouthshire into Blaenau Gwent than vice versa. The local authorities that have the highest positive balance are outside the CCR – South Gloucestershire across the Severn and Swansea to the West. It is important to note that these net migration figures are very low and overall Blaenau Gwent’s churn is very low too, the lowest of the 5 local authorities (see Table 4).

Table 4 – Migration Flows (2017)

	Inflows	Outflows	Net Flows
Caerphilly	4,922	4,687	235
Blaenau Gwent	1,888	1,834	54
Torfaen	2,856	2,597	259
Monmouthshire	4,728	4,165	563
Newport	6,878	5,780	1,098

Source: ONS, Migration Statistics, 2017

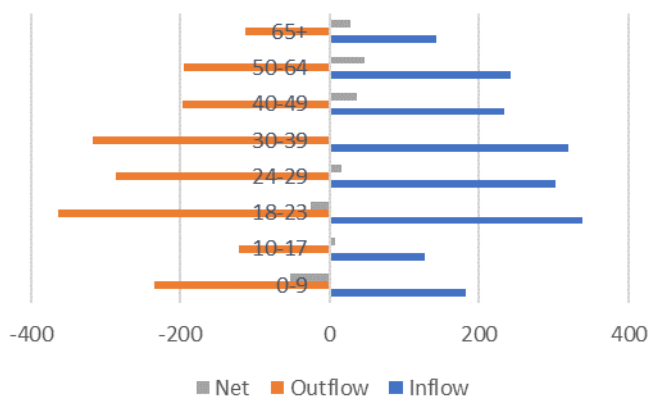
Figure 8 – Migration Patterns



Source: ONS, Migration Statistics, 2017

3.12 Figure 9 shows Blaenau Gwent’s migration flows by age group in 2017. There is a positive balance for older age groups (40+), while the negative balance for the 0-9 age group we could hypothesise that more families with kids moved out and potentially more older households, without small children, moved into the local authority area. The negative balance for those aged 18-23 group will indicate people leaving to go to university.

Figure 9 – Migration Flows by Age Group (2017)

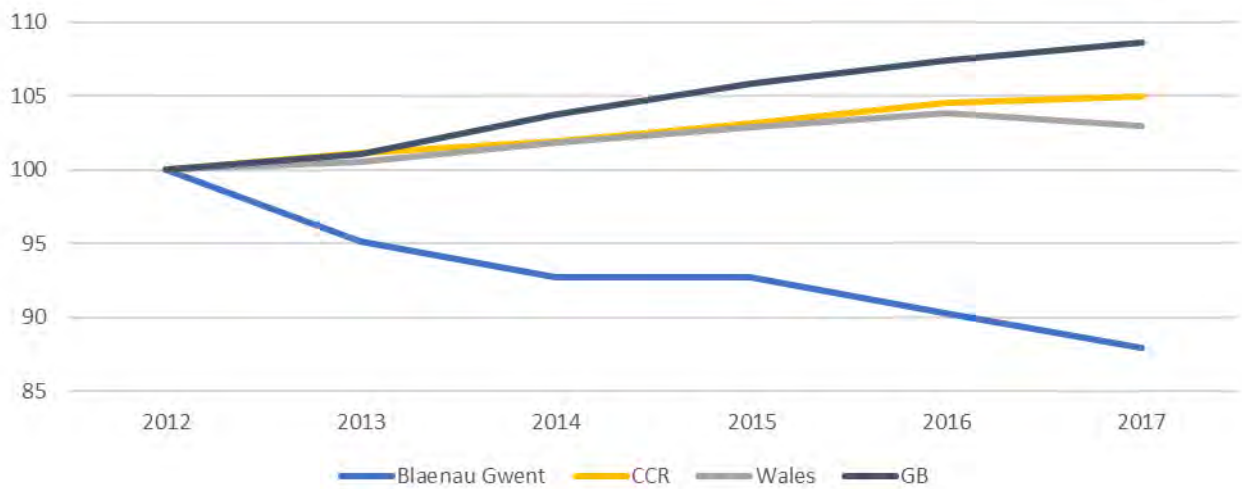


Source: ONS, Migration Statistics, 2017

Economy

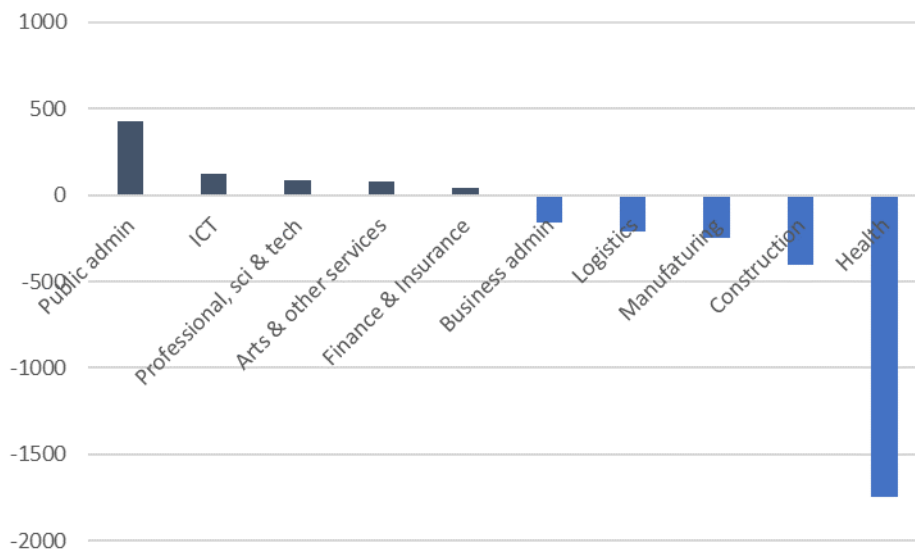
3.13 As of 2017, Blaenau Gwent’s economy supported 18,500 jobs. In the last five years, employment has declined by 12 percent, a trend against the growth observed in the City Region and the country as a whole, where the economy has grown by 3 percent, 5 percent and 9 percent respectively (see Figure 10). The job loss has been driven primarily by the Health sector that lost 1,750 jobs over the period, followed by construction (-400 jobs) and industrial sectors such as logistics and manufacturing (a combined effected of -460 jobs) (Figure 11).

Figure 10 - Indexed Employment Growth (2012=100)



Source: ONS, BRES (2019)

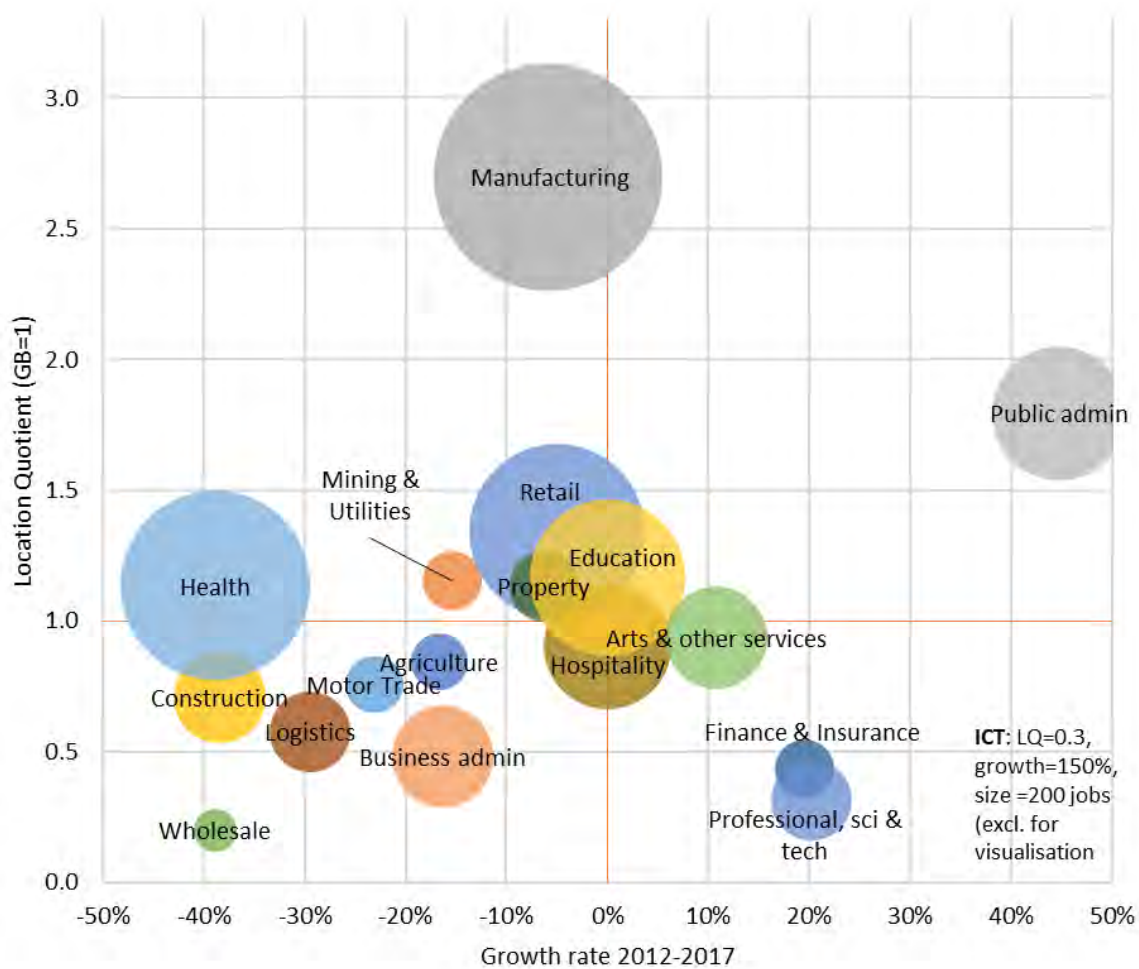
Figure 11 – Net Change in Employment (2012-17) - top 5 and bottom 5 changes by sector



Source: ONS, BRES (2019)

3.14 Figures 12 and 13 describe the sectorial dynamics of change and specialisation in Blaenau Gwent. The horizontal axis of the chart in Figure 12 measures proportional change in employment for a given sector from 2012 to 2017, while the vertical axis measures specialisation relative to Great Britain indicated by the Location Quotient (LQ). The higher is a sector's LQ above 1, the higher is its degree of specialisation locally. Each sector is represented by the different bubbles, whose size indicates the size of that sector's employment in 2017. The chart in Figure 13 re-proposes the 2017 employment distribution, by sector, in a pie chart to facilitate comparison.

Figure 12 – Employment Specialisation and Change by Sector (2012-17)



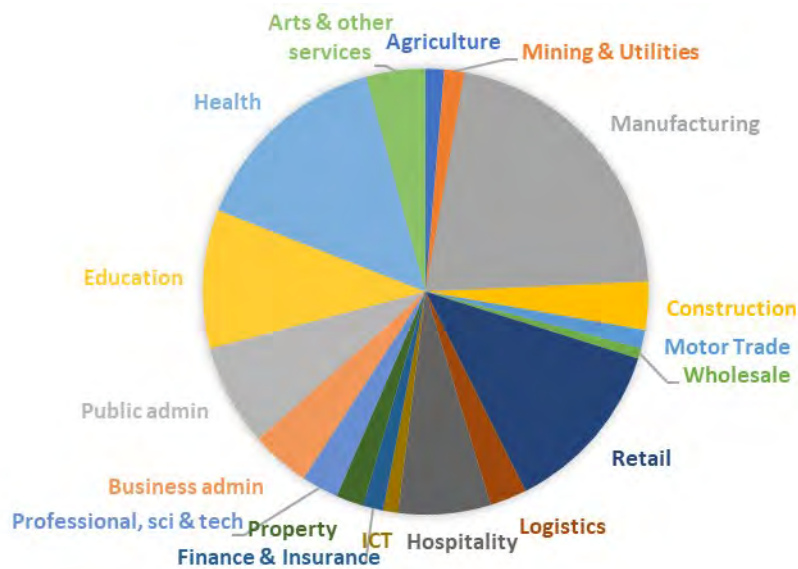
Source: ONS, BRES (2019)

3.15 The largest sector in Blaenau Gwent's economy is manufacturing, with 4,000 jobs (21 percent of total jobs), 2.7 times the proportional size of the manufacturing sector in Great Britain. Manufacturing also displays the highest degree of specialisation. However; the sector has declined by 6 percent over the period. The second highest degree of specialisation is in Public Administration, which is the only sector in

Blaenau Gwent with LQ above 1 that has also grown over the period. Other specialised sectors such as Retail, Education, Health, Property and Mining and Utilities have all declined.

- 3.16 Health and Education are respectively the second and fourth largest sectors in the economy, and together with Public Administration (fifth largest sector), the public sector makes up a considerable share of employment. This is typical for Wales but large for Great Britain. There is however indication that some creative and high-value service sectors, such as ICT, Finance and Professional Services, which are under-represented in the economy, are growing fast, presenting an opportunity for diversification into a modern, service-based economy.

Figure 13 – Employment Distribution by Sector (2017)



Source: ONS, BRES (2019)

- 3.17 Finally, Figure 14 below compares the distribution of local jobs (workplace) against the distribution of employment by residents - which can take place within as well as outside Blaenau Gwent. Most residents are employed in the public sector (Public Administration, Education and Health) which together provide the largest share of local jobs. The public sectors present the largest gap between job demand and supply, theoretically if all residents working in Public Administration, Education and Health wanted to work within the local authority boundaries, only 56 percent would be accommodated. Distribution, hotels and restaurant and Manufacturing also present a significant labour demand/supply unbalance, but on a smaller scale.

Figure 14 - Employment distribution 2018 Blaenau Gwent – Resident vs Workplace

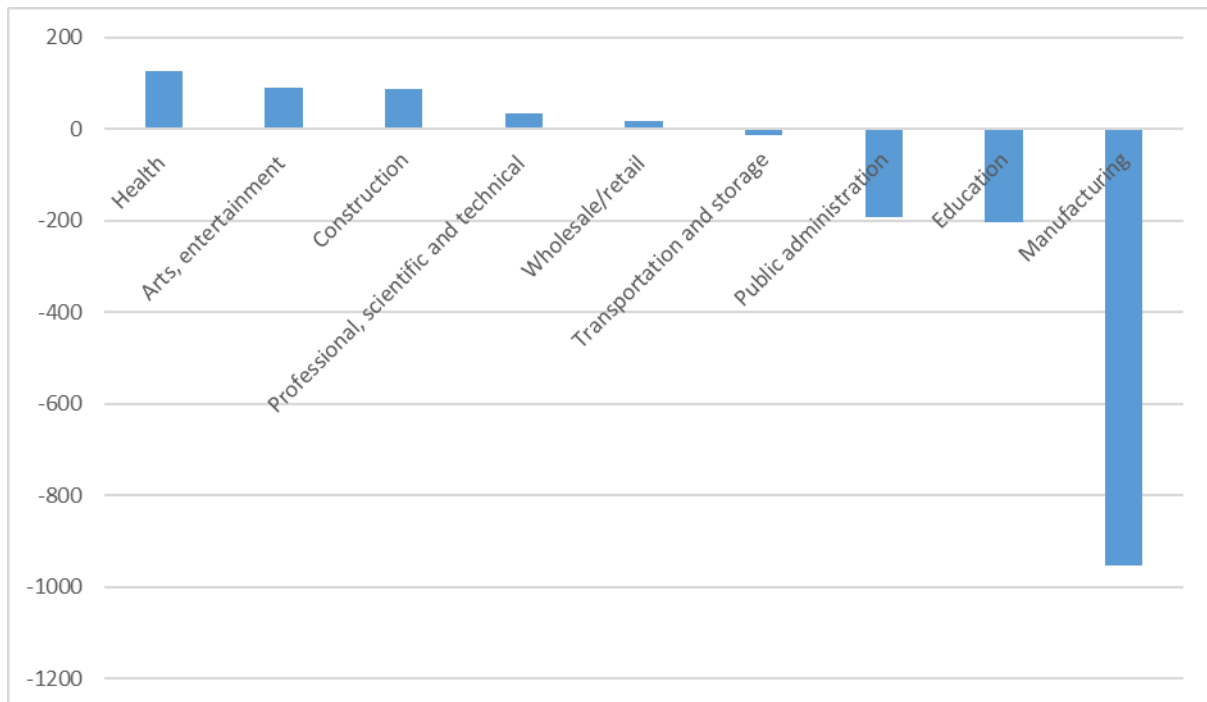


Source: ONS, APS Jan 2018-Dec 2018

Economic Forecasts

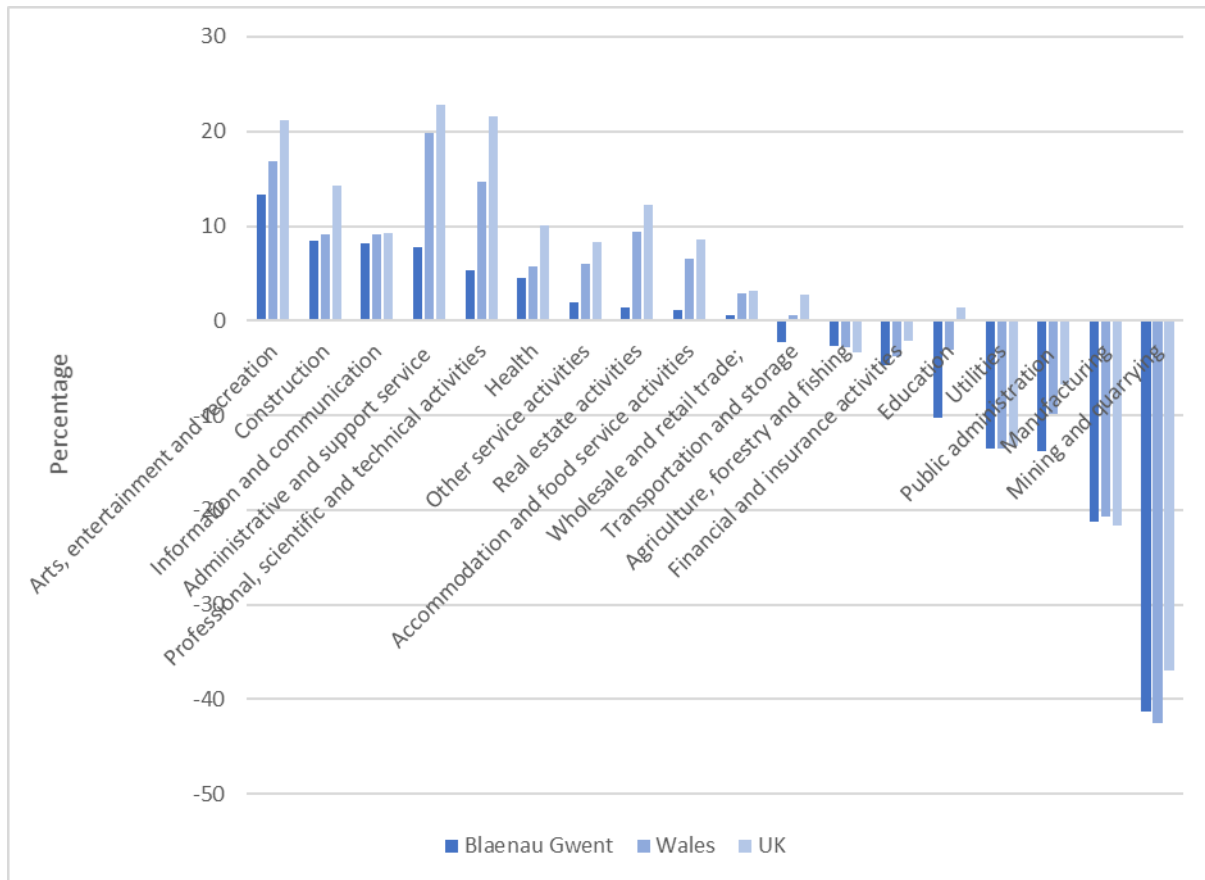
3.18 The following section is based on employment forecasts sourced from Oxford Economics for this Study. Employment in Blaenau Gwent is projected to decline by 4.5 percent to 2033, a drop of 943 jobs, from 20,800 in 2018 to 19,900 in 2033. This decline is against the growth trend projected for the UK (7 percent) and Wales (2 percent) (see Figures 15 and 16).

Figure 15 - Forecast Net Change in Employment (2018-33) – Sectors forecast to gain or lose jobs



Source: Oxford Economics (2019)

Figure 16 - Forecast Proportional Change in Employment (2018-33) – Wales/UK comparison



Source: Oxford Economics (2019)

3.19 The decline is largely driven by loss of jobs in the manufacturing sector, forecast at around 954 jobs less by 2033. This, as illustrated in Figure 16, is in line with the wider trend of industrial decline at national level (both Wales and UK). Public Administration and Education are projected to undergo a significant decline too, for a combined decrease of about 400 jobs. These are also among the largest employment sectors in Blaenau Gwent, suggesting that the impact on the economy will be significant. The projected decline in Public Administration follows national trends (both Wales and UK) although it is more significant in Blaenau Gwent, while the decline in Education is against the projected growth (albeit small) for the UK but follows the expected decline in Wales.

3.20 The largest net growth is forecast for the Health sector (126 jobs), which is proportionally smaller than the growth projected at UK level and close, but smaller, than that at Wales level. Construction, Administrative and support services and Professional services are expected to grow respectively by 89 jobs, 76 jobs and 34 jobs. When looking at the expected proportional growth for the UK and Wales,

Construction will grow at 8 percent in Blaenau Gwent, close to the Welsh average of 9 percent but below the UK average of 14 percent. Administrative and support services will grow by 8 percent, well below the Welsh average of 17 percent and the UK average of 23 percent. Professional services are expected to grow by 5 percent, well below the Welsh (15 percent) and UK (22 percent) norms.

Summary

3.21 From the above analysis, the following points can be noted:

- In the last 5 years, Blaenau Gwent's population has declined by 200 people. This decline contrasts with the 3.7 percent growth for the UK, the 2.4 percent growth for the wider city region, and the 1.7 percent growth for Wales.
- 58 percent of residents are employed in mid-low and low skilled occupations, such as administrative, sales, caring, and process. The City Region average is lower, at 45 percent.
- The proportion of residents educated at degree level and above is 13 percentage points below the City Region average (24 percent in Blaenau Gwent vs 37 percent in CCR, 35 percent in Wales and 40 percent in UK).
- Within the local authority area, it is clear that job demand outstrips supply for every occupational group, with a particular large gap in Caring and Leisure and Process/Plant & Machine Operatives occupations
- Local job supply is also significantly lower than demand for the sectors of Public Administration, Education and Health
- Blaenau Gwent has a modest level of self-containment, 52 percent of residents in employment work within the local authority area. The strongest commuting relationships are with Monmouthshire, Caerphilly and Torfaen. In terms of migration, younger families appear to be leaving the Borough while the over 40s are attracted in
- Significant job decline has been observed locally over the last five years (-12 percent), driven by the loss of jobs in the Health sector, Construction, Manufacturing and Logistics
- There is indication of economic diversification towards a service-based economy, with growth observed in high-value sectors such as ICT, Finance and Professional Services, which are under-represented in the local economy
- Employment forecasts from 2018 to 2033 project an overall employment decline of 943 jobs (- 8 percent) primarily driven by a substantial drop in manufacturing jobs.

- Construction and Professional services are expected to grow locally (by 8 percent, 8 percent and 5 percent respectively), but this growth is relatively small when compared to national projections for these sectors (respectively 14 percent, 23 percent and 22 percent in the UK).

4.0 PROPERTY MARKET ASSESSMENT

Introduction

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

Economic Context and Market Drivers

- 4.2 The UK economy has been in a prolonged state of uncertainty since the decision to leave the EU was taken in 2016. Whilst the initial fears of an immediate economic collapse proved unfounded, the expectation of the UK leaving without a positive trade deal has again ramped up following the appointment of Boris Johnson as Prime Minister in July 2019 and the fast approaching EU deadline of 31st October.
- 4.3 The sustained lack of clarity of future trading conditions has inevitably slowed (and in some case shelved) business investment decisions across the UK. Coupled with wider global uncertainty, proposals for dis-investment (and resulting plant closures) have also been brought forward in some areas, with the automotive sector being a front-runner as it seeks to shape to an alternative market norm. For example, planned closure of Honda in Swindon and Ford in Bridgend will have significant knock-on effects in local and regional supply chains which will inevitably impact on the South East Wales economy.
- 4.4 Whilst the Bank of England has recently down-graded immediate UK growth forecasts for 2019 and 2020 to 1.3 percent, interest rates remain at 0.75 percent as inflation appears under control (below the 2 percent target) and the UK labour market is considered to be healthy. The Bank's Monetary Policy Committee takes the view that Government policy remains to secure a deal with the EU resulting in a smoother trading transition. This is somewhat at odds with the wider market position with an

increased expectation of a no-deal exit, resulting in higher operating costs and a potential collapse in the value of Sterling; further impacting on UK investment, business growth potential and ultimately property market confidence.

- 4.5 Clearly progress over the next few months will need to be monitored carefully. However, it pans out, the regional property market prospects are expected to remain relatively subdued until new market relationships are more fully established and business confidence resumes.

CCR Regional Comments

- 4.6 Comments on the CCR area, summarised from the Regional Employment Study, are set out below.

Office Markets

- Across the UK, the occupier office market has become increasingly polarised towards the major cities with more limited, “local-demand” outside these core centres
- Cardiff dominates the regional office market. Although one of the smaller UK cities, Cardiff achieves a ten-year average take-up of around 46,500 sqm of office floorspace/year. Additionally, Bristol sees take up of 84,000 sqm/year which also impacts on the CCR regional market drawing-in wider sub regional market demand. Prime rents in Cardiff are rising but still lagging behind the stronger Bristol Market which continues to attract positive investor interest. There are signs of refurbishment work coming forward for much of the Cardiff City Centre office stock against a backdrop of improving market demand
- Within the Larger Than Local Area, Newport is the only location with an emerging office market of any potential strength
- Elsewhere in the CCR, pure office demand remains more subdued. Caerphilly Business Park has performed quite well in the recent past with good links to the main road network and potential access to the town centre, but rental levels are low making it harder to achieve viable development
- The decision by the Department for Works and Pensions to establish a bespoke 12,400 sqm office development in Treforest at a reported £190/sqm (£18/sqft) might raise expectations for a broader growth of office investment in the sub-region.

Serviced Offices

- One of the strong market trends recently is the surge in demand and occupier interest in serviced office (and other) accommodation and co-working environments providing occupiers with maximum flexibility. Occupiers are now prepared to pay a premium accommodation charge to benefit from easy-in/easy-out licensed arrangements
- The result of this has been a growth in new operators entering this growing market. Many of these national (indeed international) operators are now taking longer-term head-leases on larger buildings (often at a discounted headline rent), creating flexible sub-lease packages on furnished or unfurnished basis to suit individual end-users
- Whilst this is creating new market dynamic within the larger cities across the UK there is also strong underlying demand for smaller scale facilities within the smaller town centres and many established local business parks.
- Whilst the main-stream office market is considered likely to continue to focus on Cardiff and to a lesser extent, Newport City Centres, there is considerable demand potential for smaller scale work-hubs across South East Wales. Ideally located close to town centre facilities and local rail hubs.

Regional Industrial Market

- South Wales has generally sustained a strong industrial market presence with annual take-up remaining steady over 2017 and 2018 according to agents Knight Frank.
- Industrial market enquiries remain positive. However, the quality of the premises supply is causing concern among local agents as this will impact market expectations and encourage occupiers to widen their search area beyond South Wales
- Most regional demand is for industrial units in the 1,900-4,600 sqm range with limited choice in terms of available property options. Just as critical also is the limited availability of development ready industrial sites.
- Stakeholders argue that the South Wales industrial market is seriously constrained in its ability to respond to emerging opportunities. Equally, however, the development market is also constrained due to property market rents remaining stagnant.

Regional Logistics Market

- Across the UK, demand for big sheds (i.e. over 9,000 sqm) from the logistics sector has been largely driven by the on-line retail market which has grown exponentially in the last few years. In 2019 there was around 1.2 million sqm of take-up in the first half of the year to June 2019.
- Much of the market demand for space is concentrated in the East Midlands, providing easy access both from the East Coast Ports and for redistribution to the whole of the UK via the central motorway network.
- South Wales has seen very little of this new upsurge in large scale logistics and distribution activity since the 74,300 sqm Amazon warehouse opened near Swansea in 2007. Meanwhile, the South West region has seen more recent investment with the success of the Severn Side Distribution Park – Central Park – are near Avonmouth, which is drawing possible B8 investment out of South Wales
- The Welsh Government announcement, in June 2019, that the proposal for the NW M4 relief road was to be abolished, was poorly received by logistics operators as there is now no defined proposal to reduce the problem of congestion on the M4 around Newport. Some operators are now looking to leap-frog the area to focus distribution facilities further west and/or continue to serve markets from South West England but adjust delivery schedules to avoid the peak traffic congestion

Regional Market Rents

4.7 Average rental levels across the CCR are highlighted in Table 5 below.

Table 5 – Market Rents (2019), £/sqft

	Office	Serviced Space	Industrial/Warehouse
<i>Central Cardiff</i>	£20-£25 Prime £15-£18 Secondary	£25 - £30	-
<i>M4 Cardiff</i>	£12-£16	£25 - £30	£5 - £6
Caerphilly	£10-£13	£18-£20	£3.50-£4.50 £6.00 Oakdale £7-£8 Blackwood
Cwmbran	£9-£12	-	£5-£8
Mamhillad	-	£17-£18	-
Blaenau Gwent	-	£18-£20	£2-£4
Monmouthshire	-	£15-£20	£3-£6
Newport	£12-£16	-	£5-£6
<i>Central Bristol</i>	£32-£35	-	-
<i>Severnside/Avonmouth</i>	-	-	£7-£8.50

Source: PER Consulting, 2019

Welsh Government Enquiries

- 4.8 Table 6 shows enquiries received by the Welsh Government for land and premises in Blaenau Gwent and South East Wales over the 2007/08 to 2016/17 period.
- 4.9 It is worth noting that the enquiries are derived from a mix of sources including the Welsh Government website and may involve multiple searches by the same organisation, including telephone enquiries to Welsh Government and overseas inward investment interest via UK consulates – so data may not be uniformly recorded.
- 4.10 Also, the data does not tell us if the organisations enquiring about land and property Blaenau Gwent also enquired about sites and premises in some, or indeed all, of the other local authority areas of Wales. When some of the organisations are shown as having a specific interest in the County Borough, they may have had a much wider area of search for their land/property requirements. Data was not available for Blaenau Gwent, for the years 2008/2009, 2011/2012, 2013/2014 and 2015/2016.
- 4.11 Overall, 2,215 enquiries were recorded by the Welsh Government for land and property in Blaenau Gwent over the past ten years. Of these enquiries, 64.9 percent were for industrial premises, 20.5 percent were for office premises and 14.7 percent for land.

Table 6 – Welsh Government Enquiries by Type

Use	'07/08	'08/09	'09/10	'10/11	'11/12	'12/13	'13/14	'14/15	'15/16	'16/17	Total
Blaenau Gwent											
Industrial	645	N/A	66	104	N/A	140	N/A	346	N/A	136	1437
Office	268	N/A	18	18	N/A	38	N/A	81	N/A	30	453
Land	120	N/A	3	29	N/A	72	N/A	53	N/A	48	325
Total	1033	N/A	87	151	N/A	250	N/A	480	N/A	214	2215
South East Wales											
Industrial	737	754	518	325	528	312	461	663	404	443	5145
Office	365	449	270	159	309	237	513	440	227	179	3148
Land	134	96	237	108	76	129	76	76	46	136	1114
Total	1236	1299	1025	592	913	678	1050	1179	677	758	9407

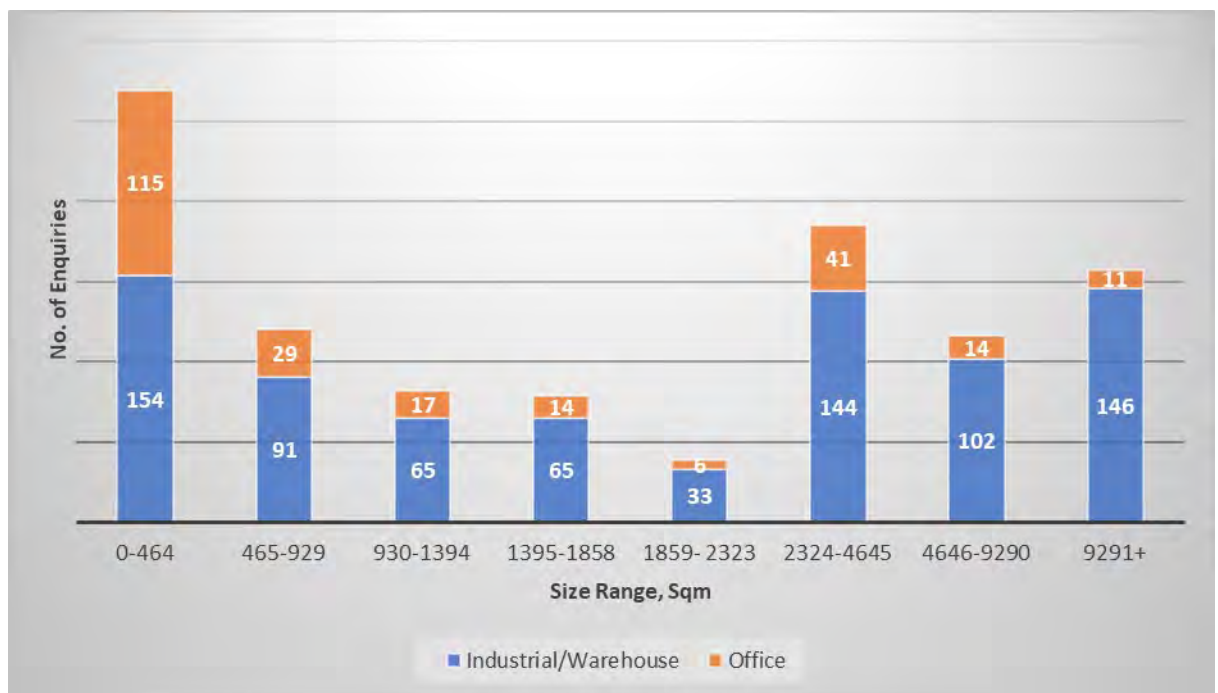
Source: Welsh Government, 2019

- 4.12 As Table 6 shows, recorded demand fell sharply for all property types between 2007/2008 and 2011/2012, reflecting a period of national recession. From 2012/2013

to 2014/2015 demand appears to strengthen before, once again, declining sharply in 2016/2017. The decline in demand is not just a local issue but can be observed across South East Wales, although demand did not fall as dramatically in the region as was observed in Blaenau Gwent in 2009/2010.

4.13 Of the 2,215 enquires with Welsh Government for land/property in Blaenau Gwent, 1,303 (59 percent) stated the size of site/unit they needed. Figure 17 provides a breakdown of the 1,047 industrial and office requirements within Blaenau Gwent where a unit size was stated.

Figure 17 – Welsh Government Enquiries by Size, 2007-2017

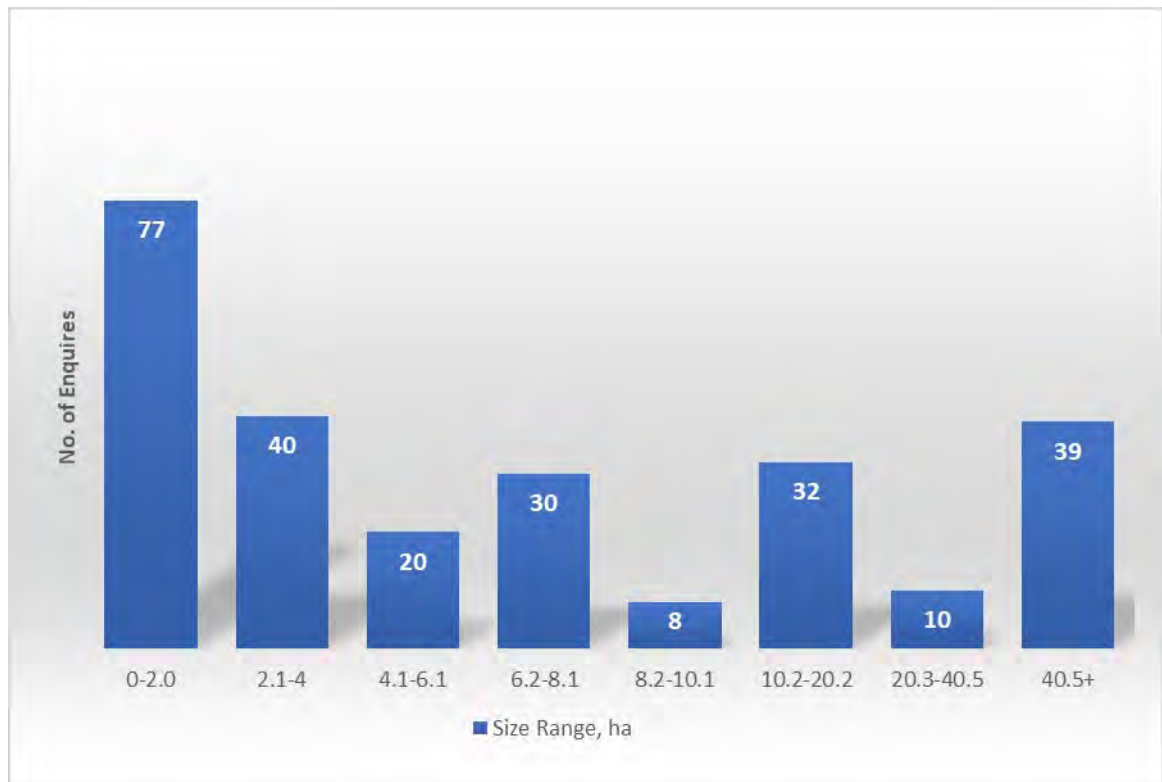


Source: Welsh Government, 2019

4.14 The data shows that demand is strongest for the smallest and largest industrial and warehouse property options. Of those enquiring, nearly a quarter sought industrial/warehouses units of 464 sqm or less. However, 42.7 percent sought units of 2,324 sqm or more. The preference for larger space will reflect the fact that many of those enquiring through Welsh Government will be large established firms with areas of search which will extend across multiple local authority areas. However, it is still worth noting that Blaenau Gwent does feature regularly within those wider search areas.

- 4.15 Almost half of office enquiries in Blaenau Gwent were for units of 464 sqm or less (46.6 percent). Only eleven enquiries were recorded for very large suites of 9,291 or larger.
- 4.16 In terms of land, again there are mixed preferences for smaller sites, up to around 4 ha and larger plots, generally exceeding 10 ha. Sites of 8.2-10.1 ha seem undesirable to the market (see Figure 18).

Figure 18 - Welsh Government Land Enquiries by Size, 2007-2017



Source: Welsh Government, 2019

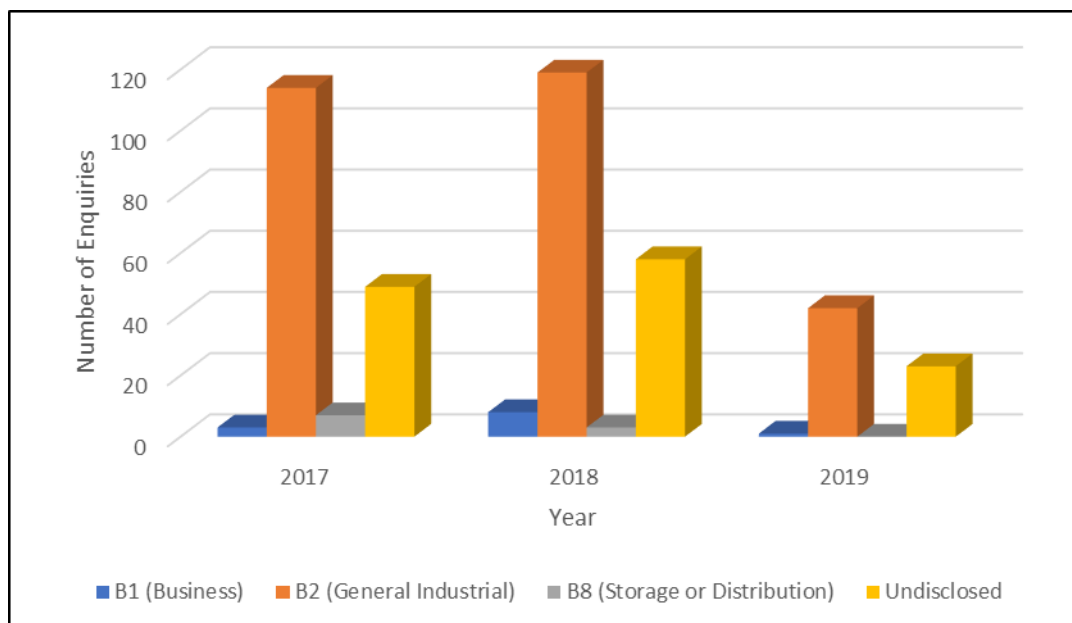
Blaenau Gwent Council Public Sector Enquiries

- 4.17 Enquiries data has been provided by the Council for 2017 onwards. This data provides enquiries categorised primarily by use class (B1, B2 and B8) while, to a lesser extent, detailing the indicative size requirement and reason for enquiring. Some of this further information is incomplete and this has been indicated in the following analysis, where appropriate.
- 4.18 As with the Welsh Government enquiries, there are caveats to the analysis of this data. The enquiries are derived from a mix of sources and duplication is likely where companies completing online forms have indicated a preference for multiple property

types, for multiple geographic locations or size ranges. As such, the data should be taken as an indicative measure of local demand only.

- 4.19 Figure 19 sets out a year-by-year analysis of office/industrial enquiries by property for Blaenau Gwent between 2017 and 2019. Over this period 427 B-Class enquiries were received, with B2 General Industrial premises accounting for almost two thirds (275). B1 Business enquiries accounted for only 3 percent (12) and B8 Storage or Distribution enquiries accounted for 2 percent (10) of interest. 30 percent of all enquiries received did not specify a property type, however the data nonetheless suggests a significant appetite for B2 General Industrial premises in Blaenau Gwent over other options.

Figure 19 – Council Enquiries (2017-2019), Type



Source: Blaenau Gwent CBC, 2019

- 4.20 Demand appears relatively consistent over time, although of course, only 2.5 years are shown.
- 4.21 19 percent of all enquiries recorded since 2017 did not state a preferred size when registering interest (see Table 7). Where a preferred size was stated, industrial operators generally want units of 51-400 sqm, and particularly 101-200 sqm. There is reasonable interest in all sizes up to 4,000 sqm however, apart from 601-1,000 sqm.

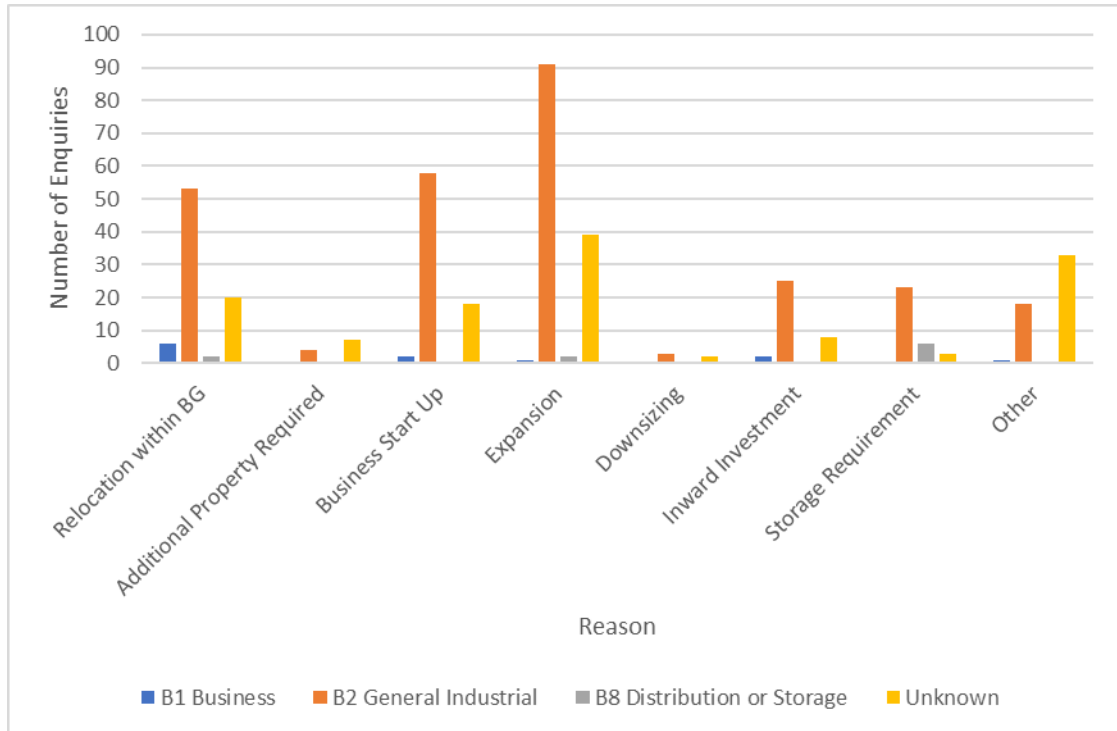
Table 7 – Council Enquiries (2017-2019), Size (Sqm)

Size (Sqm)	Use Class				Total
	B1 Business	B2 General Industrial	B8 Storage or Distribution	Unknown	
0-50	4	17	-	9	30
51-100	2	58	5	19	84
101-200	2	93	2	14	111
201-400	1	41	1	11	54
401-600	-	14	-	6	20
601-1,000	-	5	-	3	8
1,001-2,000	-	14	-	2	16
2,001-4,000	-	11	-	1	12
4,001-6,000	-	2	-	1	3
6,001-10,000	-	3	-	2	5
10,001+	-	2	-	3	5
Unknown	3	15	2	59	79
Total	12	275	10	130	427

Source: Blaenau Gwent CBC, 2019

- 4.22 B8 Storage or Distribution enquiries are for space between 51-400 sqm, although only a small number of requirements are recorded. Office demand is similarly modest, with requirements not exceed in 400 sqm of these are small, with requirements up to 400 sqm.
- 4.23 Where possible, enquiries have also been recorded with an associated motivation for the property need (see Figure 20). 31 percent of enquiries overall since 2017 came from businesses seeking expansion space, the majority of which were enquiries for B2 General Industrial premises. 19 percent of enquiries were from companies seeking relocation within Blaenau Gwent and 18 percent of all enquiries recorded since 2017 were from business start-ups requiring their first premises in the Borough.

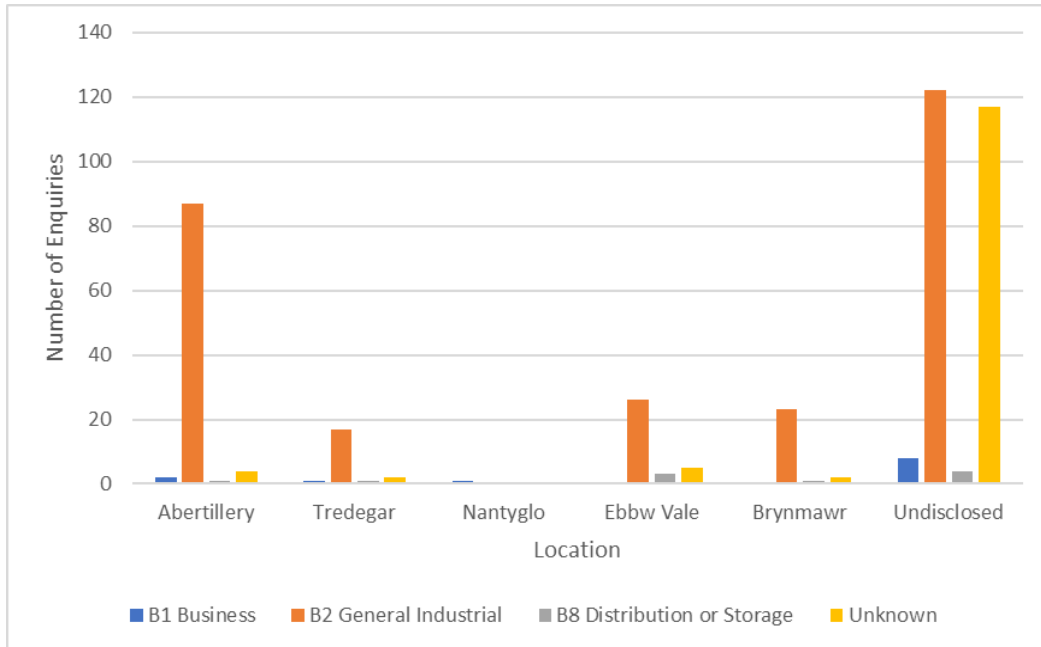
Figure 20 – LLEP Enquiries (2014-2018), Reason for Enquiry



Source: Blaenau Gwent CBC, 2019

4.24 Enquiries data does not provide information on where enquiring businesses are located. It does however indicate preferred locations in the County Borough, by use class (see Figure 21). It should be noted that 59 percent of all enquiries did not highlight a preferred location, however Abertillery emerges as the location of choice for B2 General Industrial enquiries. Tredegar, Ebbw Vale and Brynmawr are also represented for this use class. Abertillery is also strongly represented in the limited information supplied by B1 Business enquiries.

Figure 21 – Council Enquiries (2017-2019), Location



Source: Blaenau Gwent CBC, 2019

Property Deals

- 4.25 A list of recorded deals between January 2009 and January 2019 has been compiled using data from the EGi database (Radius Data Exchange) of industrial and office transactions within Blaenau Gwent. The data is displayed in tables below. Whilst this data source may not be representative of all transactions which have occurred, it does provide a guide to the level and nature of activity within Blaenau Gwent.

Industrial

- 4.26 Table 8 provides a breakdown of the 128 industrial / warehouse deals completed in Blaenau Gwent between the years of 2009 and 2019. There was a total of 240,071 sqm of floorspace transacted which can be seen split up into size band and by year in the table below.
- 4.27 2016 saw the total number of transactions peak at 32 along with the highest total amount of floorspace transacted at 58,903 sqm. This amount was aided by two transactions occurring over 10,000 sqm. The number of transactions has greatly fluctuated, but limited market activity occurred over the recessionary period 2009-

2012, followed by an increase in transactions over 2013-2016, as the national market recovered, and pent up demand was released.

Table 8 – Blaenau Gwent Industrial Transactions, 2009-2019

		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,001+	Unknown	Total
2019	Total Floorspace (sqm)	~	~	2,708	~	~	~	~	~	2,708
	No. of Properties	~	~	7	~	~	~	~	~	7
2018	Total Floorspace (sqm)	~	186	1,243	~	2,872	~	~	~	4,301
	No. of Properties	~	1	4	~	2	~	~	2	9
2017	Total Floorspace (sqm)	~	103	~	~	12,328	~	17,185	~	29,616
	No. of Properties	~	1	~	~	5	~	1	2	9
2016	Total Floorspace (sqm)	~	215	2,423	2,803	15,046	14,687	23,729	~	58,903
	No. of Properties	~	2	7	4	6	2	2	9	32
2015	Total Floorspace (sqm)	~	296	~	1,496	4,867	15,450	~	~	22,109
	No. of Properties	~	2	~	2	1	2	~	1	8
2014	Total Floorspace (sqm)	166	655	1,461	3,097	8,140	5,647	~	~	19,166
	No. of Properties	3	6	4	4	3	1	~	~	21
2013	Total Floorspace (sqm)	~	355	820	~	4,023	10,062	27,961	~	43,221
	No. of Properties	~	3	3	~	2	2	2	~	12
2012	Total Floorspace (sqm)	~	325	~	950	~	~	~	~	1,275
	No. of Properties	~	2	~	1	~	~	~	~	3
2011	Total Floorspace (sqm)	~	~	1,799	929	14,197	10,198	~	~	27,123
	No. of Properties	~	~	5	1	5	2	~	~	13
2010	Total Floorspace (sqm)	~	~	918	929	10,176	~	~	~	12,023
	No. of Properties	~	~	3	1	5	~	~	~	9
2009	Total Floorspace (sqm)	~	~	388	~	8,431	~	10,807	~	19,626
	No. of Properties	~	~	1	~	3	~	1	~	5
Total	Total Floorspace (sqm)	166	2,135	11,760	10,204	80,080	56,044	79,682	0	240,071
	No. of Properties	3	17	34	13	32	9	6	14	128

Source: Radius Data Exchange, 2019

4.28 Most of the transactions were for properties of 201–5000 sqm, with deals in these size ranges accounting for 51.6 percent of the overall number of transactions.

4.29 Of the deals, the majority, 69 percent, were completed under leasehold terms. 25 percent were completed as freehold sales and six percent as investment sales.

Office

4.30 Table 9 shows there has been a total of 13 office deals recorded since 2009, with 5,734 sqm of floorspace transacted. Transactions were infrequent with no more than three recorded in any one year.

Table 9 – Blaenau Gwent Office Transactions, 2009-2019

		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001+	Total
2019	Total Floorspace (sqm)	~	~	~	~	~	~	0
	No. of Properties	~	~	~	~	~	~	0
2018	Total Floorspace (sqm)	~	~	424	~	~	~	424
	No. of Properties	~	~	1	~	~	~	1
2017	Total Floorspace (sqm)	~	~	~	921	~	~	921
	No. of Properties	~	~	~	1	~	~	1
2016	Total Floorspace (sqm)	88	~	250	~	~	~	338
	No. of Properties	1	~	1	~	~	~	2
2015	Total Floorspace (sqm)	~	~	~	~	~	~	0
	No. of Properties	~	~	~	~	~	~	0
2014	Total Floorspace (sqm)	~	~	~	~	~	~	0
	No. of Properties	~	~	~	~	~	~	0
2013	Total Floorspace (sqm)	53	131	228	~	~	~	412
	No. of Properties	1	1	1	~	~	~	3
2012	Total Floorspace (sqm)	~	~	~	~	~	~	0
	No. of Properties	~	~	~	~	~	~	0
2011	Total Floorspace (sqm)	~	139	715	~	~	~	854
	No. of Properties	~	1	2	~	~	~	3
2010	Total Floorspace (sqm)	~	~	~	~	2189	~	2,189
	No. of Properties	~	~	~	~	1	~	1
2009	Total Floorspace (sqm)	~	~	596	~	~	~	596
	No. of Properties	~	~	2	~	~	~	2
Total	Total Floorspace (sqm)	141	270	2,213	921	2,189	0	5,734
	No. of Properties	2	2	7	1	1	0	13

Source: Radius Data Exchange, 2019

- 4.31 The low number of transactions over this period reflects the modest scale of Blaenau Gwent's office market and the fact that the UK office market was much harder hit by the recession than the industrial market and took longer to recover.
- 4.32 Most deals completed were for individual suites of 201–500 sqm. Overall there were seven transactions in this size band, 53.8 percent of transactions overall.
- 4.33 Of these deals, 46.7 percent (7) were completed under a leasehold tenure, with the remaining 40 percent being freehold sales and 13.3 percent being part of investment sales.

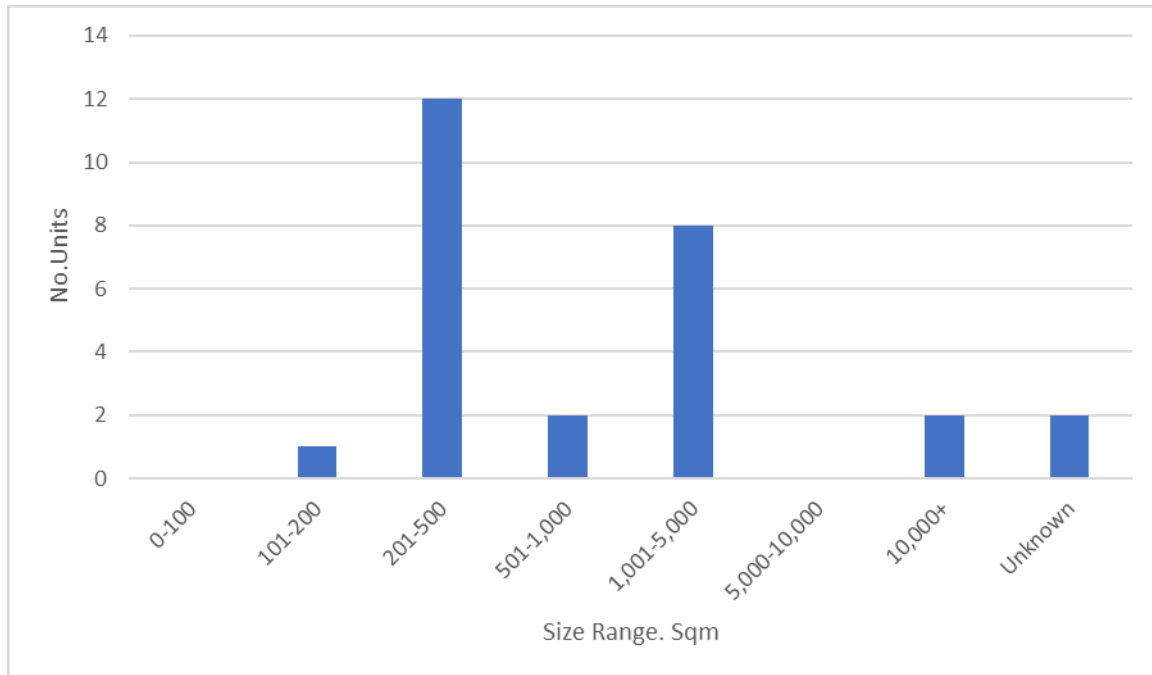
Property Supply

- 4.34 A schedule of the vacant floorspace being marketed in the study area has been compiled mainly from physical survey, a trawl of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed. It should be noted that this schedule excludes properties not being marketed for occupation.
- 4.35 Across the County, a total supply of 52,328 sqm of vacant property is reported, comprised of 31 individual premises. 50,200 sqm (96 percent of the total supply) is industrial and 2,128 sqm, in four premises, is offices. 14 of the vacant and marketed industrial units are located in Tredegar, 8 in Ebbw Vale, 4 in Abertillery and 1 in Rassau. All but one of the available offices is in Ebbw Vale and the other in Tredegar.

Industrial

- 4.36 The available industrial supply is summarised in Figure 22. The largest industrial unit then available, located in Abertillery, is 14,858 sqm and accounts for 30 percent of the vacant floorspace in the County Borough. The majority of units available are under 5,000 sqm and particularly between 201-500 sqm in size with the majority of these being located at Tredegar. 72 percent of the marketed space is available to let, 16 percent available for sale and 6 percent available for sale or to let.

Figure 22 – Industrial – Amount of Marketed Property

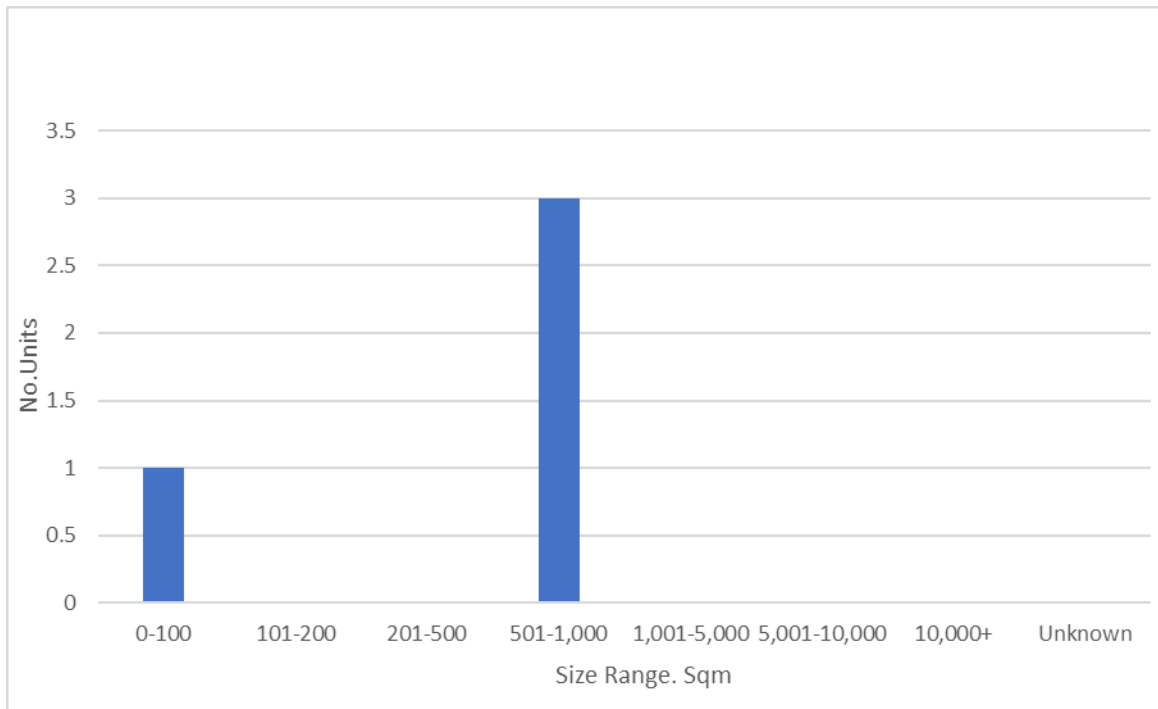


Source: BE Group, 2019

Office

4.37 As Figure 23 shows, there are four office units available in Blaenau Gwent. The ones that are available, however, are mainly between 500-1,000 sqm in size. Two of these units are available solely to lease, one is for sale and one has the option to buy or let.

Figure 23 – Office – Amount Marketed Property



Source: BE Group, 2019

Valuation Office Agency Data

- 4.38 The Valuation Office Agency provides data on the number of office and industrial premises in the whole of Blaenau Gwent, along with the total floorspace they occupy. Vacancy rates can then be subtracted from these figures to calculate the level of occupancy within the County Borough. According to the statistics of 2015-2016, there are 690 industrial hereditaments and 240 office hereditaments, totalling 533,000 sqm and 28,000 sqm respectively.
- 4.39 As of 2019, there are four vacant office premises and 27 available industrial units within Blaenau Gwent. This equates to the occupancy rates of 96 percent industrial units and 98 percent for office units by premises. By floorspace there is an estimated of 50,200 sqm of industrial and 2,128 sqm of office space available. This equates to 91 percent occupancy for industrial units and 92 percent for office units. The two different time timeframes of the data collection points mean that the occupant rates are estimates only but are useful for providing an indicative view of occupancy rates.
- 4.40 80-90 percent occupancy rates are considered to be a reasonable balance between an active market which also provides capacity for growth. A higher occupancy rate is an indicator of a supply shortfall, with businesses having potential difficulties in

finding premises. Whereas a low occupancy rate would indicate lower demand and poor business growth.

- 4.41 For Blaenau Gwent, the occupancy rates are high for both industrial / warehouse use and office use, this suggest some constraints on supply.

Property Market – Stakeholders

- 4.42 This section provides qualitative evidence of the demand for industrial and office property within Blaenau Gwent, through consideration of the comments of stakeholders' active in the County Borough's property market – developers, scheme managers and their agents.
- 4.43 12 private sector stakeholders were contacted by telephone for an informal discussion of the property market. These comprise the main commercial property agents who are active in Blaenau Gwent and the wider CCR. To protect anonymity of individuals and organisations, names of commentators are not revealed.
- 4.44 These views are the opinions of the representatives of the consulted organisations at the time of consultation. They are not the views of Blaenau Gwent County Borough Council or the Study Team.
- 4.45 Their views are summarised below, split to discuss the industrial, logistics and office/high tech markets.

Local Industrial Market

- 4.46 The Blaenau Gwent commercial property market is predominantly focused on the industrial sector with a relatively strong manufacturing presence, albeit operating from a low-cost property base. Whilst the traditional industries of coal and steel have been largely removed from the area, the region remains focused on low-skill manufacturing with an expectation of low overheads as a key attractor for business.
- 4.47 Much of the available property is also relatively dated and in need of refurbishment. Rental values for general industrial units are typically around £19.40-£26.90/sqm (£1.80 - £2.50/sqft) in locations such as Crown Avenue Business Park Tredegar or the larger Rassau Industrial Estate. Some landlords have committed to refurbishing some older stock such as Hansteen on Tafarnaubach Industrial Estate. Asking rents here are closer to £32-£43/sqm (£3.00-£4.00/sqft); although this is still subject to negotiation and dependent on length of lease and covenants.

- 4.48 Market demand is strongest among local employers predominantly for units up to 500 sqm, although enquiries can extend up to 1,500 sqm. Small workshop space is in relatively high demand with rents reaching £43.00-£48/sqm (£4.00-£4.50/sqft) reflecting the smaller unit size; with key schemes including Cwm Small Business Centre, Ebbw Vale.
- 4.49 More general industrial enquiries tend to have a much wider (South Wales) search area rather than specifically being for Blaenau Gwent locations. There are regular general enquiries around for industrial space in the range of 4,600-9,300 sqm but very few available properties across the region and rarely anything immediately available, of good quality at least, in the Blaenau Gwent area. In particular there is a lack of freehold options which established modern companies are increasingly seeking. Available freehold space is being purchased and refurbished, for letting and by funds.
- 4.50 Whilst there is development land available within the Enterprise Zone area, most industrial enquiries tend to have a short-term window for occupancy and typically seek readily available property; especially where there is flexibility in actual location. Additionally, much of the development land in Blaenau Gwent has been slow to come forward due to preparation costs and environmental concerns which continues to limit growth options. Welsh Government proposals to deliver a new 4,600 sqm speculative development is hugely welcomed by the commercial property market and, together with the commitment to refurbish the 185,000 sqm former Techboard Unit, will provide a significant boost to the commercial offer of the Blaenau Gwent region.
- 4.51 The former Techboard property has been linked with a planned move by the sports car manufacturer TVR which will be a significant investment for the local area with potential to attract further supply-chain investment. Although the planned move has still to be finalised, progressing the refurbishment work will provide a much stronger proposition to attract other mobile investment to the area without the complication of delays in property delivery.

Logistics Market

- 4.52 The primary focus from the pure Logistics Market remains on the M4 corridor around Chepstow and Newport; albeit with increasing competition from the M5 at Severnside now well positioned to also serve South Wales. Most of the B2 manufacturing

demand for Blaenau Gwent, however, also includes an element of B8 distribution allowing for self-distribution of completed products and goods. In this way, proximity to the A465 is significant, especially for those operators serving the Midlands market. Hence the improved accessibility of the northern half of Blaenau Gwent with completion of the A465 dualling will further enhance the marketability of industrial sites and premises.

- 4.53 Looking forward, opportunities could exist to attract distribution operators to Blaenau Gwent as an alternative to the increasingly congested M4 corridor. This would suit operators who link South Wales with the wider Midlands area (as an alternative to the M5 corridor) and enabling “break-of-bulk” and onward distribution in smaller vehicles and last-mile connection.

Office and High-Tech Markets

- 4.54 The pure office market in Blaenau Gwent is poorly developed, reflecting the largely industrial nature of the business environment and labour market skills. Office demand has historically been limited to local services utilising small office suites above shops in the town centres and public sector occupiers.
- 4.55 The regeneration of the former steel works in Ebbw Vale has, however, stimulated positive market demand for small scale hybrid office/tech space. This is demonstrated by good levels of demand and occupancy in UK Steel’s Innovation Centre which provides fully serviced accommodation on flexible monthly terms equivalent to around £193-£215/sqm (£18-£20/sqft). Demand is primarily leasehold, although freehold options are rare anyway.
- 4.56 Indeed, further market stimulus has emerged with the decision by French owned, Thales to establish a new Cyber Security Research Centre in Ebbw Vale following support from Welsh Government. Alongside this decision is the proposal for a final phase of hybrid business units to be developed on the Works site under Joint Venture arrangements between Welsh Government and Blaenau Gwent Council. This will provide up to 930 sqm of business space across nine individual units which should see strong market interest (subject to suitable rental levels) given the high-quality central location.
- 4.57 Further investigations are also underway to explore the market interest in a potential test-track facility on the site of the former Circuit of Wales proposals. Whilst initially

operating on a simple bureau-lease to use basis, this could provide further stimulus to other high-tech research and manufacturing

Market Rents

4.58 The market rental tone across Blaenau Gwent is highlighted in Table 10 below. For simplicity, the figures are only presented in terms of £ per sq. ft. This is based on quoting rental values for available property in each area. Rental differences reflect both the quality of different floorspace and general location/accessibility to the main road network.

Table 10 – Market Rents (2019), £/sqft

	Industrial	Hybrid Space	Serviced Office
Crown Avenue Business Park Dukestown Tredegar	£1.78 - £1.99	-	-
Rassau Ind Estate	£1.80 - £3.30	-	-
Rising Sun Industrial Estate, Blaina	£2.50 - £3.00	-	-
Tredegar Business park	£3.00	£4.00	-
Cwm Small Business Centre Ebbw Vale	£4.00 - £4.50	-	-
Roseheyworth Business Park Abertillery	£3.50-£4.00	-	-
Glandwr Ind Estate Abertillery	£2.50 - £4.15	-	-
Innovation Centre – Ebbw Vale	-	-	£18.00 - £20.00

Source: PER Consulting, 2019

Summary

4.59 Across the UK, the occupier office market has become increasingly polarised towards the major cities, including Cardiff, with more limited, “local-demand” outside these core centres. Within the Larger Than Local Area, Newport is the only location with an emerging office market of any potential strength. However, serviced office demand is more evenly spread across South East Wales.

4.60 South Wales has generally sustained a strong industrial market presence, with demand remaining steady over the last few years. Most regional demand is for industrial units in the 1,900-4,600 sqm range with limited choice in terms of available property options. Just as critical also is the limited availability of development ready industrial sites. Logistics demand remains constrained by M4 congestion and competition from Severnside.

- 4.61 Welsh Government receives more enquiries for industrial space than for offices; and fewest for sites. Of those enquiring for industrial/warehouse space, around a quarter sought units of 464 sqm or less. However, 42.7 percent sought units of 2,324 sqm or more, likely with an area of search extending across multiple local authority areas in the CCR. Almost half of office enquiries in Blaenau Gwent were for units of 464 sqm or less. In terms of land, again there are mixed preferences for smaller sites, up to around 4 ha and larger plots, generally exceeding 10 ha. The enquiries received Blaenau Gwent saw a similar preference for smaller B2 General Industrial Space.
- 4.62 In terms of industrial deals over the last ten years, properties of 201–5000 sqm are most commonly transacted for mixed freehold and leasehold occupancy. Since 2009, offices of up to 500 sqm have been most commonly transacted, with just over a third of deals being in the 0-100 sqm range. Again, these were mostly leasehold deals.
- 4.63 As of summer, 2019, there was 50,200 sqm of industrial floorspace on the market, comprising 27 properties. Although most available properties are sub-1,000 sqm in size, there is reasonable availability in all size ranges, including two properties of more than 10,000 sqm in size. 79 percent of the marketed space is available to let only.
- 4.64 The Blaenau Gwent commercial property market is predominantly focused on the industrial sector with a relatively strong manufacturing presence. Much of the available industrial property is relatively dated and in need of refurbishment. Rental values for general industrial units are typically around £19.40-£26.90/sqm (£1.80 - £2.50/sqft).
- 4.65 Market demand is strongest among local employers predominantly for units up to 500 sqm. Small workshop space is in relatively high demand with rents reaching £43.00-£48/sqm (£4.00-£4.50/sqft). There are regular South Wales wide enquiries around for industrial space in the range of 4,600-9,300 sqm but very few available properties across the region.
- 4.66 Whilst there is development land available within the Enterprise Zone area, most industrial enquiries tend to have a short-term window for occupancy and typically seek readily available property; especially where there is flexibility in actual location.

4.67 The pure office market in Blaenau Gwent is poorly developed, reflecting the largely industrial nature of the business environment and labour market skills. The regeneration of the former steel works in Ebbw Vale has, however, stimulated positive market demand for small scale hybrid office/tech space.

5.0 STAKEHOLDER CONSULTATIONS

Introduction

- 5.1 This section provides commentary about Blaenau Gwent County Borough, drawn from consultations with the public sector and other stakeholders – primarily the major businesses and landowners. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture. In some cases, consultations with Welsh Government, will overlap with those in the Regional Employment Study, and this Study has endeavoured to draw out points of specific relevance to Blaenau Gwent.
- 5.2 The Council have provided a list of seven key businesses in the County Borough who have agreed to be contacted for this Study. All have been contacted by BE Group and five responses have been secured. Of the remaining businesses, responses were not made despite multiple attempts to contact them.
- 5.3 Discussions were also undertaken with a range of property agents and landowners/ developers of the County Borough's employment land supply. The comments associated with these consultations are considered separately and can be found in Sections 4.0 and 6.0.
- 5.4 Finally, engagement with neighbouring authorities is progressed through the Regional Employment Study, with Blaenau Gwent's neighbours of Caerphilly, Torfaen and Monmouthshire participating in that Study.

Welsh Government

- 5.5 Welsh Government is developing a Property Development Action Plan. The overall ambition is to deliver 158,000 sqm of additional office and high-tech space. 70,000 sqm of this proposed for South East Wales.
- 5.6 Delivery is likely to be via a Property Development Grant (PDG) to third parties but direct investment and development, by Welsh Government, is also a possibility. Welsh Government intends to work with the Development Bank for Wales to enhance the existing £55 million PDG Fund under existing State Aid Exemptions (to September 2020). Rules and governance for this will need to be revisited after Brexit.

- 5.7 In September, work will begin on a Strategic Framework for South East Wales, with a consultation programme with regional partners to determine key priorities. This will inform the operational priorities for post-EU Structural Fund interventions.
- 5.8 In terms of the market offer, Welsh Government officers are concerned about the weak perceptions of many local authority areas in CCR as places for business investment. Across the CCR there is a need for local economies to move further up value chain to break an over-reliance on low-end manufacturing and gain traction in higher level supply chain activity.
- 5.9 Growth will be focused on industrial sectors, high value office investment outside Cardiff is really hard to sell/promote, with the possible exception of smaller scale development in Newport.
- 5.10 Welsh Government investments in Blaenau Gwent are, as discussed elsewhere, delivery of speculative space in Rhyd-Y-Blew and refurbishment of a site/buildings in Rassau Industrial Estate, intended for motor manufacturer TVR.

Ebbw Vale Enterprise Zone

- 5.11 Discussions on the Ebbw Vale Enterprise Zone were completed with Welsh Government officers in areas of Regional Development and Delivery and Entrepreneurship Promotion. They highlighted the following.
- 5.12 Welsh Government commissioned a review of Enterprise Zone's across Wales, with a report expected in 2019 (unpublished at the time of writing). This is intended to advise on the appropriate package of economic incentives for Enterprise Zones moving forward.
- 5.13 The Ebbw Vale Enterprise Zone designation continues although the Advisory Board has been dissolved. The Enterprise Zone advice role has now transferred across to the Tech Valleys Advisory Board, covering a wider area. Blaenau Gwent Council also formed a Local Enterprise Board to retain some of the local economic input and insight from Business.
- 5.14 Delivery in the Enterprise Zone has been slow. However, this is felt to reflect the level of site works and infrastructure needed to bring sites forward, rather than a lack of demand. Key projects being progressed include:

- Welsh Government intend to build a 4,645 sqm speculative unit on Rhyd y Blew. This reflects a commitment made following the demise of the Circuit of Wales project. The development will also open up the site for further growth
 - Rassau Industrial Estate – Working to establish a Business Improvement District
 - Have provided some business improvement grants to support improvement to units. Although the response to and take up of these grants has been mixed
 - The Works – The final phases of development here are proposed. These include a JV between Welsh Government and the Council for Hybrid. Some 929 sqm across nine units. Also delivering the ‘Box-works’ also to be provided, using converted shipping containers, as low-cost business starter units.
- 5.15 There are significant supply shortages across Blaenau Gwent, particularly for smaller properties. This issue is well established and gives Enterprise Zone partners confidence in bringing forward new space on a speculative basis. The completion of dualling along the A465 Heads of Valleys, by 2021, should act as a further spur to growth.
- 5.16 In terms of sectoral demand, Welsh Government has noted the planned development of a £20 million cyber security centre in Blaenau Gwent in collaboration with Thales, the National Digital Exploitation Centre (NDEC) at The Works. Completion is expected by 2021. It will allow SMEs and microbusinesses to test and develop their digital concepts and provide a base for academic research. The initial project is expected to create 11 jobs, but it is hoped it will deliver far more in terms of spin off growth. Welsh Government are not seeing much evidence of this at present though.
- 5.17 Blaenau Gwent has expressed an interest in creating food-units. While Welsh Government accepts there is demand from food producers locally, the high fit out costs of food production units will make delivering a viable scheme challenging.

Blaenau Gwent County Borough Council

- 5.18 Face to face meetings were held with senior officers in Planning, Economic Development, Environment and Regeneration.
- 5.19 Overall, officers were positive about Blaenau Gwent’s economic future. They see a growing business base, with new companies encouraged into the area by its skilled,

but affordable labour force, and affordable property, both business premises and housing. The high quality 'valleys' environment of Blaenau Gwent, and its links to the Brecon Beacons National Park, is also an attractor for businesses where quality of life is important.

- 5.20 In the CCR context, an overheating commercial property market in Bristol is encouraging companies to look across the Severn to Wales. While this is primarily benefitting Cardiff, Newport and Cwmbran, the Council feels it can, and is, attract some of the overspill north to Blaenau Gwent.
- 5.21 It is felt these positive elements are not exclusive to Blaenau Gwent but shared with its neighbours on the A465 Heads of Valleys Road. There is a great deal of economic interaction and commuting along this economic corridor.
- 5.22 A particular recent success has been the capture of investment from high technology firm Thales, who took up some 2,000 sqm for Cyber-Testing. This links to the Strong Cyber Security presence across South East Wales which, in turn, links to GCHQ in Cheltenham. This cluster is dispersed enough, however, to minimise staff leakage/loss through competition.
- 5.23 In addition to attracting existing businesses, Blaenau Gwent is identified as having the second highest business start-up rate in Wales, with some 23-24 new businesses being created each month in the County Borough. The high level of start-ups, plus growth in existing micro firms means that strong demand for smaller industrial units of 0-100 sqm exists, although there are also shortages in the 5,000 sqm range to allow larger firms to expand.
- 5.24 Generally, the Blaenau Gwent economy is moving from dependence on a small number of big employers (i.e. the Steel Works) to one dominated by micro and small businesses, in a diverse range of sectors. It is generally felt that Blaenau Gwent is no longer dependant on any one sector, and the Council wishes to continue encourage diversity in employment base and enhance in-work skills base to enhance local productivity.
- 5.25 One specific area of demand noted is from food processing industries, particularly those serving the West Midlands market. However, Blaenau Gwent has few food-grade ready units available to meet this demand locally.

- 5.26 Against this need, while Blaenau Gwent has a strong offer of land there is a lack of choice and quality of available premises. For example, the Council owns 184 units in the County Borough, of which 160 were occupied at the time of this Study, an occupancy rate of 87 percent by units and 88-90 percent by floorspace. The stock, which is available, comprises mostly larger, older units, developed in the 1980s.
- 5.27 Against this lack of choice and quality, Council Economic Development officers are encouraging the Council to invest directly in developing new SME business space. This is in addition to the micro/small business schemes being progressed at the 'The Works' through mixed funding.
- 5.28 The Council also continues to engage with Welsh Government on its plans to develop speculative premises in locations including Rhyd-y-Blew. Additionally, on the work proceeding to refurbish an 18,500 sqm unit which is intended for British car manufacturer TVR. TVR is attracted to the CCR by the existing presence of Aston Martin in the Vale of Glamorgan. TVR want to be close to Aston Martin, to take advantage of their shared supply chain, but not too close for the two companies to compete for skilled engineering staff. At the time of writing, TVR had yet to formally commit to locating in Blaenau Gwent. Although even if the company did not ultimately relocate, the refurbished building will be a valuable asset to attract other occupiers.
- 5.29 Circuit of Wales, was a proposed motor racing circuit and technology park development project in Blaenau Gwent on the outskirts of Ebbw Vale, by the A465 Heads of the Valleys Road. This proposal has now been rejected, but a feasibility study is underway for a 'test-track' facility which may attract wider racing/tech investment relocations.

Local Businesses

- 5.30 One to one consultations have taken place with five businesses located in the County Borough. The aim of these consultations was to assess both the current situation of these employers, as well as how their land and property needs may change moving forward.
- 5.31 Businesses consulted were generally very satisfied with their operations in Blaenau Gwent and most have been in the County Borough for many years. Respondents praised the County Borough's strong position on the strategic road network and its skilled workforce. They draw the bulk of their labour force from the local area and do not struggle to retain staff.

- 5.32 The impacts of Brexit and the ability of the UK to secure trade deals are key short-term concerns to those who trade internationally, but it is not expected that these will ultimately cause business to leave Blaenau Gwent.
- 5.33 The companies contacted have mostly satisfied their property needs in recent years, those planning for the long term have identified growth options in the local area.

Summary

- 5.34 Welsh Government is developing a Property Development Action Plan with the ambition to deliver 70,000 sqm of additional office and high-tech space in South East Wales, via an enhanced Property Development Grant.
- 5.35 Welsh Government officers are concerned about the weak perceptions of many local authority areas in CCR as places for business investment. There is a need for local economies to move further up value chain from low-end manufacturing. Growth will be focused on industrial sectors.
- 5.36 The Ebbw Vale Enterprise Zone designation continues under the Tech Valleys Advisory Board. Blaenau Gwent Council also formed a Local Enterprise Board. Delivery in the Enterprise Zone has been slow. This is felt to reflect the level of site works and infrastructure needed to bring sites forward, rather than a lack of demand. A number of key projects are now being progressed.
- 5.37 Stakeholders argue that there are significant supply shortages across Blaenau Gwent, particularly for smaller properties. This issue is well established and gives Enterprise Zone partners confidence in bringing forward new space on a speculative basis.
- 5.38 Blaenau Gwent Council were positive about Blaenau Gwent's economic future. They see a growing business base, with new companies encouraged into the area by its skilled labour force; affordable property; high quality environment and strong strategic transport links. Also, an overheating commercial property market in Bristol is encouraging companies to look across the Severn to Wales.
- 5.39 In addition to attracting existing businesses, Blaenau Gwent is identified as having the second highest business start-up rate in Wales. The high level of start-ups brings demand for smaller industrial units of 0-100 sqm, although there are also shortages

in the 5,000 sqm range to allow larger firms to expand.

- 5.40 Generally, the Blaenau Gwent economy is moving from dependence on a small number of big employers (i.e. the Steel Works) to one dominated by micro and small businesses, in a diverse range of sectors.
- 5.41 Businesses consulted have been in Torfaen for many years and remain loyal to the County Borough. Although Brexit, and associated macro-economic issues, are concerns it is not expected that these will ultimately cause business to leave Blaenau Gwent. The companies contacted have mostly satisfied their property needs in recent years, those planning for the long term have identified growth options in the local area.

6.0 AUDIT OF EMPLOYMENT SITES

Introduction

- 6.1 This section looks at the portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Blaenau Gwent needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. Having initially established how much land there is, the second task is to consider how much is needed in the future (to 2033), which is picked up in Section 7.0.

Land Supply

- 6.2 The start point for the supply side assessment is Policy EMP1 'Employment Allocations' of the Blaenau Gwent County Borough Council Local Development Plan up to 2021. This allocates 13 sites, totalling 50.0 ha, for primarily B1, B2, and B8 Uses (see Table 11). This section reviews those 13 sites.

Table 11 – Baseline Employment Land Supply, for Analysis

Policy Number	Site Name	Hub	Indicative Developable Area (ha)
Strategic Sites (B1 and B2 Use Classes and an ancillary facility or service to the proposed employment use)			
MU1	Rhyd-y-Blew	Ebbw Vale	13.2
Business Parks (B1 Use Class and an ancillary facility or service to the proposed employment use)			
MU2	'The Works' Business Hub	Ebbw Vale	3.5
EMP1.1	Land at Festival Park	Ebbw Vale	0.7
EMP1.2	Land at Tredegar Business Park	Tredegar	2.1
EMP1.3	Land at Rising Sun Industrial Estate	Upper Ebbw Fach	1.6
Primary Sites (B1, B2, and B8 Use Classes, an appropriate Sui Generis use and an ancillary facility or service to the proposed employment use)			
MU1	Bryn Serth	Ebbw Vale	10.0
EMP1.4	Rassau Platform A	Ebbw Vale	3.4
EMP1.5	Rassau Platform B	Ebbw Vale	3.7
EMP1.6	Land at Waun-y-Pound	Ebbw Vale	4.6
EMP1.7	Marine Colliery	Ebbw Vale	3.4
EMP1.8	Crown Business Park Platform A	Tredegar	0.7

Policy Number	Site Name	Hub	Indicative Developable Area (ha)
EMP1.9	Crown Business Park Platform B	Tredegar	1.6
EMP1.10	Land at Roseheyworth Business Park	Lower Ebbw Fach	1.5
Total Indicative Developable Area			50.0

Source: Blaenau Gwent CBC, LDP, 2012

Supply Analysis

- 6.3 Table 12 analyses Blaenau Gwent's supply, outlining the size, nature and location of each site, providing comments on its status and recommendations on its future delivery. It also identified the realistically available amount of employment land in each site. The Table summarises Site Proformas provided at Appendix 2.
- 6.4 The analysis follows 'Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales' (Report of the Pathfinder Group, 2017).
- 6.5 Overall, the bulk of the Baseline Supply of 50.0 ha remains realistically available for B1/B2/B8 and appropriate Sui Generis uses. Although firm development plans are only in place for three of the 13 sites, relevant property requirements have been noted for most of the rest providing evidence of ongoing demand for those plots. Although formal appraisals are not undertaken for this study, no significant constraints have been identified which render any site undevelopable for B-Class uses.
- 6.6 However, a reduction of 0.79 ha is made to EMP1.10: Land at Roseheyworth Business Park to allow for the Household Waste Civic Amenity Site now consented in the south of the site.
- 6.7 Although formal decisions have yet to be made, the most likely use for the 3.4 ha EMP1.7 Marine Colliery is a rail hub for an adjacent quarry. Although a valuable use for the County Borough it mostly sits outside the traditional B Use classes, into minerals (and transport) uses.

Table 12 – Employment Land Analysis

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
Strategic Sites									
MU1	Rhyd-y-Blew	Ebbw Vale	The site is located within one of the flagship regeneration sites, Ebbw Vale Northern Corridor. The site has good links to the A465 - Heads of the Valley Road and Ebbw Vale town centre. The site is a flat area of land which can be accessed from Bryn Serth road. To the north of the site lies the existing residential area of Rassau and beyond that Rassau Industrial Estate. To the east of the site is Morrisons store. The southern end of the site lies adjacent to and provides links to Bryn Serth. The A465 runs parallel to part of the western boundary providing access on to Bryn Serth road.	<ul style="list-style-type: none"> A public Right of Way runs along the eastern boundary of the site which provides pedestrian linkage through the site to the existing residential community of Rassau to the north. Gently sloping in places 	Welsh Government owned. The site now has consent for a 4,955 sqm B1/B2/B8 industrial or warehouse unit on a site of 2.88 ha (which incorporates some expansion or further development land). It is assumed this will be developed speculatively as a first phase of development, to be followed by others subject to its success.	The site should be retained for employment purposes. The land has larger than local significance and is a key regeneration investment site for the County Borough. In seeking consent for B-Class uses, Welsh Government have made a commitment to development here and to consider speculative delivery.	13.2	13.2 (B1/B2/B8)	Yes
Business Parks									
MU2	'The Works' Business Hub	Ebbw Vale	Land here comprises three development plots - BUS 2: Land at the Lime Avenue/Festival Drive Junction; BUS 1,3-5: Land north of the hospital; BUS 6: Land adjacent to the General Offices - which for part of the broader mixed-use 'The Works' site, sitting alongside the hospital, Gwent Coleg, leisure and other uses. The broader area comprises the	<ul style="list-style-type: none"> Relevant plots are in Flood Zone C2 	Primarily B1 developments. Various proposals progressing via Welsh Government, Tech Valleys and Blaenau Gwent Enterprise Board: BUS 2: Lime Avenue Employment Park. 25 units, in six terraced blocks, ranging from 56-464 sqm. Planning consent is being sought for 1,692 sqm of B1 and 2,568 sqm of B2	The site should be retained for employment use. Very high value infill plots in a key regeneration area. Plans for B-Class premises are being actively progressed on all the plots, with multiple planning consent's secured along with funding.	3.5	3.5 (B1 primarily)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			former Ebbw Vale Steel Works and is now a key site within the Ebbw Vale Enterprise Zone programme area. The Works is centrally located in Ebbw Vale, with direct access to Ebbw Vale Town Station. There are a range of services to the west, along the A4046.		<p>floorspace. Funding needs to be secured.</p> <p>BUS 3-4: Lime Avenue Hybrid Business Units. Nine units ranging from 223-929 sqm and totalling 2,350 sqm. Consented for planning with funding approved as a joint venture between the Council, Welsh Government and the Welsh European Funding Office. Welsh Government owned land. Tenders for development are being evaluated. Construction expected to commence in 2019, with completion by September 2020</p> <p>BUS 6: BOX Works, 21 micro business units of 15-20 sqm (929 sqm in total), consented for planning with most funding approved (small shortfall to resolve). Project led by Welsh Government on Government owned land. Construction expected in summer 2019.</p> <p>Land north of Coleg Gwent - provision of 856 sqm of offices (A2/B1)</p>				
EMP1.1	Land at Festival Park	Ebbw Vale	The site is a flat vacant development platform centrally located within Festival Business Park, to the north of an Innovation Centre, which	No known constraints	Council owned land. The Council has received a range of enquiries for this land, from high value companies and a	The site should be retained for employment use. Key infill plot in a high value local	0.7	0.7 (B1 primarily)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			has very good links to the wider area and is located in close proximity to the Ebbw Vale rail link, the Works site and Ebbw Vale Town Centre. Access can be achieved via existing highway infrastructure provided within the business park.		developer. The adjoining Innovation Centre operators have also expressed interest in the site, although only for overspill parking.	employment area, which is attracting market interest. Given the demand for this land, the Council should put in place a plan to allow for its disposal, as soon as possible.			
EMP1.2	Land at Tredegar Business Park	Tredegar	The site is located at the southern end of Tredegar Business Park and benefits from a constructed access road as a result of the development of the first two phases of the business park. The site is a flat development platform with good access links to Tredegar town centre. To the north are existing industrial units, the Sirhowy river runs parallel to the eastern boundary. At the southern boundary the land abuts Bridge Street Industrial Estate and the eastern boundary runs parallel to Iron Row at a lower level. The site is also part of the Ebbw Vale Enterprise Zone.	<ul style="list-style-type: none"> The site is located partly within a B flood zone and partly within a C2 flood zone in the south eastern corner. 	Council owned site. Land links to the Innova One building to the north. This 2,788 sqm property is on the market. A historic D1 Training Centre, the building is on the market for office/warehousing uses. Land could form a southern expansion option for this property.	The site should be retained for employment purposes. Land represents a logical extension to an existing business park and location is attracting market interest. Also, land supply is more limited in Tredegar compared to Ebbw Vale. Given market interest, it is recommended that acceptable uses here be broadened to B1/B2/B8 and relevant Sui Generis. Larger size of site also means it is better able to support B2/B8 options than many other sites in the Tredegar area.	2.1	2.1 (B1, likely B2/B8)	Yes
EMP1.3	Land at Rising Sun Industrial Estate	Upper Ebbw Fach	The site is reclaimed industrial land located to the north of Rising Sun Industrial Estate off the A465. To the east of the site are residential properties	<ul style="list-style-type: none"> There is a small drain located on site Access shared with school. This 	Council is in negotiations with a potential large business occupier for this site. Further details remain confidential at this time.	The site should be retained for employment purposes. Although the adjacent school	1.6	1.6 (B1 primarily)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			and to the north of the site is a new Welsh primary school. Access to the site is achievable through the new primary school site.	adjacent use will provide some limits on what employment uses can be accommodated on this site.		puts some limits on what can be delivered here, the land is still required by the market, representing a defined growth plot for Rising Sun Industrial Estate.			
Primary Sites									
MU1	Bryn Serth	Ebbw Vale	The site is located within one of the flagship regeneration sites, Ebbw Vale Northern Corridor. The site has good links to the A465 - Heads of the Valley Road and Ebbw Vale town centre via the A4047. The site is a flat area of land which can be accessed from Bryn Serth road. The northern boundary of the site lies adjacent to and provides links to Rhyd-y-Blew. To the east of the site is Waun-y-Pound Industrial Estate. Site is within the Ebbw Vale Enterprise Zone. The southern end of the site lies adjacent to SINC ENV3.22 - Waun-y-Pound which contains a series of ponds and the Aneurin Bevan Stones, beyond that is the existing residential community of Sirhowy. The eastern boundary of the site abuts a Green Wedge.	<ul style="list-style-type: none"> A number of public Rights of Way run through the site which provides pedestrian linkage to adjacent land at Rhyd-y-Blew and beyond to Rassau. 	Newbridge Construction own. Plans include a hotel and pub/restaurant in the south east corner of the site, at the junction of Bryn Serth Road and A4047. It is understood Newbridge Construction have interest from a hotel and pub/restaurant operator for this land and are expected to seek planning on this as a first phase of development. This reflects the MU1 Policy allocation here (leisure) in the LDP. The central area of the site is retained for B1/B2/B8 employment, with the north west corner of the site also identified for Roadside Services in the LDP.	The site should be retained for employment. Although in the short term most development here is likely to be for non B-Class uses, the land represents a logical next phase of development for Rhyd y Blew to the north where development is likely in the short term. Completion of Rhyd y Blew would provide a critical mass of B-Class premises in the area and, assuming success here, encourage developers to look south for more development land to continue growth. Although this appears to have already been undertaken, supply figures will need to	10.0	10.0 (B1, B2, B8 likely, an ancillary facility or service)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
						allow for any relevant land lost to B-class uses.			
EMP1.4	Rassau Platform A	Ebbw Vale	The site is a vacant development platform located on the north eastern edge of the well-established Rassau Industrial Estate, which is also part of the Ebbw Vale Enterprise Zone. The estate is located off the new Heads of the Valleys Road north of Ebbw Vale and benefits from existing highway infrastructure although access roads will need to be upgraded. Industrial area to the south is vacant.	<ul style="list-style-type: none"> • Trees on site 	Welsh Government owned land, on the market with Jones Lang LaSalle (as is Platform B). Understood to be attracting good market interest.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route.	3.4	3.4 (B1/B2/B8 appropriate SG)	Yes
EMP1.5	Rassau Platform B	Ebbw Vale	The site lies along the eastern boundary of the well-established Rassau Industrial Estate which is located off the Heads of the Valleys road north of Ebbw Vale and is part of the Ebbw Vale Enterprise Zone. Access to the site can be achieved through the employment allocation to the west of the site (EMP1.4 Rassau Platform A). Industrial area to the south west is vacant.	<ul style="list-style-type: none"> • Power lines cross the site • Woodland to the south (shown in area boundary) • Possible land contamination 	Welsh Government owned land, on the market with Jones Lang LaSalle (as is Platform B). Understood to be attracting good market interest.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route. Site would be accessed through neighbouring land - EMP1.4 Rassau Platform A. It is assumed both sites would be brought	3.7	3.7 (B1/B2/B8 appropriate SG)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
						forward as a linked development scheme. The site boundary, in the existing LDP, incorporates a sizable area of woodland to the south (5 ha, approx.) included to secure S106 funding for woodland management/improvements as part of any development scheme. This approach should be reviewed in the replacement LDP.			
EMP1.6	Land at Waun-y-Pound	Ebbw Vale	The site is located to the south-west of Waun y Pound Industrial Estate. To the north west is the existing industrial estate, the remainder of the site is surrounded by woodland. The development site is divided into 2 distinct areas, a northern platform and a southern platform. The southern platform is higher and accessed from the industrial access road to the west. It is a flat platform that is now grassed (contains rushes) over with a number of trees in the southern corner. There are prominent views into the site from the east. The northern platform is at a lower level and is accessed by the eastern access road. An access road into the site has already been	<ul style="list-style-type: none"> • Trees on site • Historic mining and waste site 	Was allocated for waste uses (Policy W1.1) in the existing LDP but is no longer required for this purpose. Site has seen strong market interest, but historic mining/waste uses, and adjacent lower quality uses are identified as barriers to securing a developer/occupier.	The site should be retained for employment use. Expansion land to a small, but modern, local industrial estate, accommodating major employers, which has seen some development. Site is attracting market interest, but stakeholders also suggest that historic uses on the site do impact on deliverability. This should be clarified before site is allocated again in the next LDP.	4.6	4.6 (B1/B2/B8 appropriate SG)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			provided.						
EMP1.7	Marine Colliery	Ebbw Vale	There is a large flat development platform south of Cwm on the former Marine Colliery site which is located off the A4046. An access road has already been provided to the site. To the north of the site is a Scheduled Ancient Monument - Marine Colliery Pumping Engine. The eastern boundary of the site borders the new rail connection and there is potential to develop rail sidings to enable sustainable transport of goods as reflected in the LDP (policy T2.5). The western boundary is bordered by the River Ebbw. This development platform sits at the bottom of a steeply sloping wooded valley.	<ul style="list-style-type: none"> The site is in Flood Zone B 	Council owned land although Welsh Government has a Clawback on value generated from the site. Various proposals are being considered for this site, including industrial development, a cemetery and energy from waste facilities. Most likely, at the time of writing, would be a rail freight station (related to LDP Policy T2.5), serving a new sandstone quarry which would be developed on land east of the A4046, further up the valley. The Council is preparing reports and looking to make a decision as to a preferred way forward. It is understood the quarry is most favoured as it allows the extraction of specialist sandstone, not readily available elsewhere.	Review future of site, reflecting the differing requirements noted above. If rail freight for quarry emerges as preferred option, then the location becomes a minerals and waste transport facility rather than land for B1/B2/B8 employment. This change of focus should be reflected in the emerging LDP and the land removed as an ordinary employment allocation.	3.4	0.0 (Likely Rail Freight for Minerals use)	Maybe
EMP1.8	Crown Business Park Platform A	Tredegar	This is a vacant site situated within the well-established Crown Business Park at the eastern corner adjacent to David Spears Car Sales. The site is located in close proximity to the new Heads of the Valleys Road where access can be achieved from the existing highway infrastructure serving the	<ul style="list-style-type: none"> Partly sloping Footpath/cycle route crosses the site Watercourses on the site 	The land was recently sold to an adjacent occupier who is considering the development of businesses units, both to meet its own expansion needs and to provide space for other occupiers.	The site should be retained for employment use. Site owner is considering B-Class uses to meet both its own needs, and the needs of others. Development of this site thus appears likely.	0.7	0.7 (B1/B2/B8 appropriate SG)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			employment units. The site is a flat, grassed platform although the land slopes steeply to the east and south where there are ordinary watercourses.						
EMP1.9	Crown Business Park Platform B	Tredegar	This is a vacant site situated within the well-established Crown Business Park which is located off the new Heads of the Valleys Road. Access can be achieved from the existing highway infrastructure serving the employment units. The site is a flat, grassed platform where there are ordinary watercourses present.	<ul style="list-style-type: none"> • Nant Melyn Brook crosses part of the site • Footpaths cross the site 	Council owned land. The Council has received recent requirements to build hybrid business units here.	The site should be retained for employment purposes. Expansion land in a large local industrial estate, accommodating a number of major employers for the County Borough. The land has, and continues to, receive enquiries for a number of B-Class uses.	1.6	1.6 (B1/B2/B8 appropriate SG)	Yes
EMP1.10	Land at Roseheyworth Business Park	Lower Ebbw Fach	The site is located off the A467 and is a vacant rectangular area of land which lies on the edge of Roseheyworth Business Park and adjacent to Roseheyworth Primary School. Access to the site can be achieved through an extension of the existing access roadway serving Roseheyworth Business Park. A community footpath runs along the southern and eastern boundary of the site, which would have to be protected in the layout of any development. Trees line the western boundary of the site which	<ul style="list-style-type: none"> • The site is partially located within Flood Zone B • Trees on site • Watercourses on edge of site • Footpath on edge of site 	Consent has now been granted for a Household Waste Civic Amenity Site on 0.79 ha of land in the south of the site, with access from the existing estate road provided along the eastern boundary of the site (also taking in the land most at risk from flooding). Other land remains available for B-Class development, with no further development planned at this time.	Protect the remaining land for B-Class uses. The Waste Facility significantly reduces the available B-Class development land, but a useful expansion site remains of 0.71 ha which allows some growth to Roseheyworth Business Park, now a local centre for high tech and high value businesses. Adjust site allocation boundary to allow for Waste Facility and to	1.5	0.71 with Waste Facility excluded (B1/B2/B8 appropriate SG)	Yes

Policy Number	Name	Location	Site Description	Constraints	Intended Development (If Any)	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or identified for employment uses?
			screen the site from A467 road, this should be retained to act as a buffer to the road corridor. There is an area of tree coverage in the south western corner and the presence of watercourses along the western and eastern boundaries of the site which should be protected.			account for any land which is undevelopable due to flood risk.			
Total							50.0	45.81	-

Source: Blaenau Gwent CBC /BE Group, 2019

6.8 In Table 13 scenarios are presented for Blaenau Gwent’s land resource, considering the total supply initially and then adjusting it according to the various assumptions made above. As shown, accounting for all these changes gives a realistic supply estimate of 45.81 ha.

Table 13 – Blaenau Gwent Land Supply Scenarios

Scenario	Cumulative Total Land Supply, ha	Comments
Baseline	50.00	Maximum Land Supply
Amended Baseline, excluding land consented for waste uses	49.21	Excludes 0.79 ha at EMP1.10: Land at Roseheyworth Business Park
Amended Baseline, excluding land consented for waste uses and land being considered for infrastructure as part of a mineral’s facility (Realistic Supply)	45.81	Excludes 3.4 ha at EMP1.7 Marine Colliery <i>N.B. It is caveated that the option to use EMP1.7 as a rail freight station serving a nearby sandstone quarry is not yet confirmed as the preferred option. If this use is not ultimately delivered here the land would remain available for B-Class options.</i>

Source: Blaenau Gwent CBC and BE Group, 2019

6.9 Of that Realistic Supply, 85 percent (39.1 ha) is found in the Ebbw Vale. Only 4.4 ha (9.6 percent) is found in Tredegar, comprising the two sites at Crown Business Park and EMP 1.2 Land at Tredegar Business Park. The remaining land is found at Upper and Lower Ebbw Fach.

6.10 Of the realistic supply, 82.8 percent (37.91 ha in eight sites) is suitable for the full range of B1, B2, B8 (and appropriate Sui Generis) uses. This includes all the remaining Primary Sites and the Strategic Site Rhyd-y-Blew. Land at MU2 The Works. EMP1.1 Land at Festival Park and EMP1.3 Land at Rising Sun Industrial Estate, totalling 5.80 ha (12.7 percent), is expected to primarily provide B1 uses. The remaining 2.10 ha at EMP1.2 Land at Tredegar Business Park would also focus on B1 uses, but in market terms is large enough to support B2/B8 options as well.

Site Grading

6.11 All sites have been graded using a standard scoring system (see Appendix 3) which reflects guidance in ‘Employment Paper for SEWSPG: A Common Methodology for

Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales' (Report of the Pathfinder Group, 2017). Each site is scored out of 20, made up of three individual measures, each scored out of five – Accessibility, Environmental Factors (internal to the site and external, i.e. in the surrounding area) and Market Attractiveness (see Table 14).

Table 14 – Sites Scoring*

Policy Number	Name	Site Size, ha – Realistically Available for B1/B2/B8 Use	Total Score, Max 20
MU2	'The Works' Business Hub	3.5	18
EMP1.2	Land at Tredegar Business Park	2.1	15
EMP1.10	Land at Roseheyworth Business Park	0.71	15
MU1	Rhyd-y-Blew	13.2	14
MU1	Bryn Serth	10.0	14
EMP1.8	Crown Business Park Platform A	0.7	14
EMP1.1	Land at Festival Park	0.7	13
EMP1.4	Rassau Platform A	3.4	13
EMP1.3	Land at Rising Sun Industrial Estate	1.6	12
EMP1.5	Rassau Platform B	3.7	12
EMP1.7	Marine Colliery	0.0	12
EMP1.9	Crown Business Park Platform B	1.6	12
EMP1.6	Land at Waun-y-Pound	4.6	10
Total		45.81	

Source: BE Group, 2019

*The individual site scorings, by category can be found in the Site Proformas in Appendix 2.

- 6.12 The highest scoring site MU2 'The Works' Business Hub. This reflects the site's high-profile position in the centre of Ebbw Vale, close to a rail station and surrounded by good quality uses. Most particularly it reflects the fact that there are well defined development plans being actively progressed on all the plots which make up this site. EMP 1.2: Land at Tredegar Business Park and EMP1.10 Land at Roseheyworth Business Park also score very highly and represent the best local employment land in the County Borough's Employment Areas.

- 6.13 EMP1.6: Land at Waun-y-Pound scores most poorly, this reflects the fact that there are some questions as to whether historic uses here have impacted on deliverability of the land.

Employment Areas

- 6.14 In this sub-section an assessment of Blaenau Gwent's 21 main Employment Areas is made in order to provide guidance as to their continued viability and options for growth/redevelopment. Again, the assessment process used reflects that set out in 'Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales' (Report of the Pathfinder Group, 2017). Detailed proforma analyses are provided at Appendix 4 The analysis is summarised in Table 15, below.
- 6.15 Overall, there is some 333.56 ha of developed land in, or with potential for, B1/B2/B8 uses in Blaenau Gwent County Borough. A third of this, 113 ha, comprises EMP2.2: Rassau Industrial Estate, with EMP2.5: Tafarnaubach Industrial Estate, 59.6 ha, accounts for another 17.9 percent. All the rest are less than 30 ha in size and 13 (61.9 percent) are less than 10 ha in size.
- 6.16 Blaenau Gwent's identified Employment Areas contain some 640,177 sqm of occupied B1, B2, B8 floorspace, with another 45,258 sqm in 'other' employment uses, an overall floorspace total of 685,435 sqm. Within this 83,697 sqm is identified as vacant (although not necessarily being marketed). Thus, while some employment areas have quite high vacancy rates of over a third, overall the County Borough's stock of employment premises is well occupied, by floorspace, with an 87.8 percent occupancy rate
- 6.17 Occupancy rates of 90-100 percent can be considered high, giving little choice to businesses while rates of 70 percent or less suggest excess capacity in the stock, possibly coupled with issues of quality in the supply. 87.8 percent is thus a reasonable occupancy rate allowing for the natural churn of businesses expanding and relocating.

Table 15 – Existing Employment Area – Assessment Summaries

ID: Site Name	Location	Size, ha	Description	Floorspace, Sqm							Vacant Parcels of Land on Existing Site	Site Scoring, Max 30
				B1 Office	B1 Other	B2	B8	Other Uses	Total Vacant Units	Site Vacancy Rate (%)		
EMP2.1: Tredgar Business Park	Tredgar	6.9	Tredgar Business Park is located in the ward of Tredgar Central and West. To the north of the business park is a residential area known as St George's Court. Immediately to the east is the River Sirhowy and further east is a residential area. To the west is Tredgar town centre and to the south is Bridge Street industrial estate. There are only three units on site, one in the ownership of BGCBC and two privately owned. The latter includes Innova One, the 2,789 sqm former British Gas Training Academy in the south of the developed area, for sale at £1.4 million. Area supports several high-tech businesses, and properties partly/totally in D1 training uses, including the Valleys Information Technology and Communications Centre (ViTCC).	1443.43	2,462.80	0	0	0	2,189	1 / 4 x 100 = 25%	One allocated site - see above	25
EMP2.2: Rassau Industrial Estate	Ebbw Vale	113.0	Rassau Industrial Estate is located within the Ebbw Fawr Valley within the ward of Rassau. The site is accessed directly from the A465 Heads of the Valleys road. The industrial estate abuts open countryside on the north, east and western edges. To the south. This strategic scale industrial estate, providing a diverse mix of privately-owned property in a range of sizes, but focused on larger B2/B8 units. Incorporates several major employers for the County Borough.	3,266.88	1,132	35,6088.4	11,847.69	2,748.57	31,725.53	10 / 48 X 100 = 20.83%	Two allocated sites - see above	21
EMP2.3: Waun y Pound Industrial Estate	Ebbw Vale	20.9	Waun-y-Pound Industrial Estate lies within the Ebbw Fawr Valley within the ward of Ebbw Vale North and is located off the A4047. The north of the site abuts the boundary of MU1 Ebbw Vale Northern Corridor which is a mixed-use allocation. To the north of the site lies an out-of-town retail area and the Heads of the Valleys road. To the east, the site lies adjacent to a Site of Importance for Nature Conservation ENV3.41 - Sirhowy Hill Woodlands and Cardiff Pond. The residential area of Sirhowy is located south of the site and to the west are Anuerin Bevan Memorial Stone and a Site of Importance for Nature Conservation ENV 3.22 - Waun-y-pound. The majority of the units are privately owned, 2 units are in council ownership. It incorporates one major employer to the west, Continental Teves, plus a group of smaller mixed industrial, storage and trade uses in the east.	0	1,502.5	21,196.25	5,325.54	5814.74	0	0	One allocated site - see above Parcel 1: Vacant area of land located adjacent to Hanson. Full application - approved on this site for a warehouse store (C/2018/0187). Land used for open storage, but no permanent structures on the site – 0.33 ha Parcel 2: Vacant undeveloped land situated on a corner location towards the southern end of the site, adjacent to a car park. The land is covered with vegetation and quite a few trees. The land is council owned – 0.72 ha Parcel 3: Vacant undeveloped land located to the east of the site. The land lies between existing businesses U-Hire and Travis Perkins – 0.61 ha	18
EMP2.4: Festival Park	Ebbw Vale	21.12	The site is located within the Ebbw Fawr Valley and partly in the wards of Ebbw Vale South and Cwm. The site can be accessed directly off the A4046. To the north is The Works and Ebbw Vale town centre. The eastern boundary runs parallel to the railway line which runs from Ebbw Vale Town Centre Station to the Parkway Station located south of the site. To the east is the residential area of Garden City. The southern boundary abuts a residential area and also lies in close proximity to the Garden Festival site and the Garden Festival Retail Park. The majority of the units are privately owned, there are 4 units to the south of the site which are in council ownership. Festival Park industrial estate is split into two areas by the A4046. The larger units are located to the north which also includes a number of very small units located within the Innovation Centre. To the south are a number of Council owned office units, a hotel and restaurant.	5,162.71	401.41	7,650.53	6,628.18	1,441.48	303.14	2 / 35 x 100 = 5.71%	One allocated site - see above Parcel 1: This site is on the northern edge of the festival site and just south of the works site. The site is surrounded by roads, to the west is the main A4046 to Ebbw Vale/Newport, to the north and east is the main industrial access road and to the south is the access road roundabout for the site. The site slopes upwards to the north and east and it is overgrown grassland with the land to the west forming a steeply sloping embankment to the main road. – 1.34 ha	22

ID: Site Name	Location	Size, ha	Description	Floorspace, Sqm							Vacant Parcels of Land on Existing Site	Site Scoring, Max 30
				B1 Office	B1 Other	B2	B8	Other Uses	Total Vacant Units	Site Vacancy Rate (%)		
EMP2.5: Tafarnabach Industrial Estate	Tredegar	59.6	Tafarnabach Industrial Estate is located in the Sirhowy ward, Tredegar. The estate is located in the north of the Borough off the Heads of the Valleys road (A465). To the north of the estate is open countryside. To the east of the estate is the residential area of Nantybwh. To the south is the A465 road and Parc Bryn Bach. To the west of the estate is the residential area of Princetown. Units on the estate are privately owned, comprising a diverse group of mostly larger, older B2/B8 properties.	2,349.16	5,633.54	65,728.96	11,138.55	14,180.99	21,764.86	7 / 26 x 100 = 26.92%	<p>Parcel 1: This site is a flat parcel of land which is covered in vegetation. The site is located east of the estate, adjacent to existing employment unit; Acorn Windows. The site was previously allocated for employment in the Unitary Development Plan (A34). Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history – 0.8 ha.</p> <p>Parcel 2: The site is a relatively flat parcel of land which slopes slightly to the south and is covered in vegetation. The site is in the private ownership of NMC. The site is located adjacent to NMC's existing industrial units to the east of the estate. The site was previously allocated for employment in the Unitary Development Plan (A33). Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history – 1 ha</p> <p>Parcel 3: The site is a flat parcel of land covered in vegetation. The site is in the private ownership of Hansteen and is located adjacent to industrial unit 27 ATAL, north of the estate. Farmland abuts the rear northern boundary. The site was previously allocated for employment in the Unitary Development Plan (A32). Access to the site can be achieved via existing highway infrastructure. Planning permission is being sought on the land for a building comprising six starter business units (B1) and parking for HGVs with associated workshop/office building – 0.6 ha</p> <p>Parcel 4: The site is a flat area of land covered in vegetation. The site lies adjacent to industrial unit 30; Waldrons Commercials and is located at the north western edge of the estate. Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history – 0.7 ha</p>	18
EMP2.6: Crown Business Park	Tredegar	28.5	Crown Business Park is located in the Sirhowy Valley and within the ward of Sirhowy. To the north of Crown Business Park is the A465 which also provides access to the site and beyond that open countryside. To the east is open land and the two strategic employment sites - Rhyd y Blew and Bryn Serth. To the south and west are residential areas. The estate has a mix of council owned and privately-owned units, comprising mostly larger B2/B8 units, including several larger employers for the County Borough	2,938.11	579.97	31,056.7	2,425.17	2,190.75	15,715.07	11 / 45 x 100 = 24.44%	<p>Two allocated sites - see above</p> <p>Parcel 1: The site is located in flood zone C2. The site is greenfield land of high ecological value according to the candidate site assessment for the LDP. Apart from the top plateau the site has steep embankments leading down to Nant Melyn Brook and stream corridor. The road serving Crown Business Park is capable of accommodating the development. It is in common ownership with the unit to the north, occupied by Metro Rod, and could be used for expansion – 1.4 ha</p>	19
EMP2.7: Pond Road Workshops	Nantyglo	1.4	The site is located in the Upper Ebbw Fach valley in the Nantyglo ward. To the north of the site is the Semtex Pond and further north is Lakeside Retail Park which comprises of Asda, Pets at Home, Home Bargains, Marstons Pub, Peacocks, Halfords and the Card Factory. To the east is the A467 and beyond is a residential area. To the west and south is the former Nantyglo school site and rugby ground. The site is accessed off Pond Road. Units on site are council owned and comprise a small dense scheme of terraced units, primarily serving the local market.	164.45	667.5	223.61	102.87	499.72	749.98	9 / 30 x 100 = 30%	-	19
EMP2.8: Blaenant Industrial Estate	Brynmawr	9.1	Blaenant Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo and is accessed off Blaenavon Road. The site has a mix of unit sizes which are mostly privately owned with a small number in the ownership of the Council. The northern end of the site abuts Old Blaenavon road and lies in close proximity to Noble Square Industrial Estate and Brynmawr recreation ground. To the east, the site abuts open countryside which is designated as a Special Landscape Area - ENV2.2 Eastern Ridge & Mynydd James. The western boundary lies in close proximity to the new Primary Resource Centre. The southern border of the site abuts Cwmcrahen Industrial Estate and Barleyfield Industrial Estate. The site lies in close proximity to Brynmawr town centre and the Heads of the Valleys Road. The estate has a mix of council owned and privately-owned units, comprising a mix of small terraced units and larger self-contained B2/B8 options.	147.7	198.23	8,874.16	665.98	815.53	231.56	3 / 23x100 = 13.04%	<p>Parcel 1: A relatively flat parcel of land which is located north east of the industrial estate. The site is dense with shrubbery and a large amount of tree coverage. Though none of the trees are protected, they do form a buffer along the northern and eastern edges of the site. There is no planning history for this site. The bulk of the land is owned by the Council, with a parcel in the west part of a common holding with the Avon TSA facility to the west – 1.6 ha</p>	20

ID: Site Name	Location	Size, ha	Description	Floorspace, Sqm							Vacant Parcels of Land on Existing Site	Site Scoring, Max 30
				B1 Office	B1 Other	B2	B8	Other Uses	Total Vacant Units	Site Vacancy Rate (%)		
EMP2.9: Barleyfield Industrial Estate	Brynmawr	7.8	Barleyfield Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. To the north the site abuts Blaenant Industrial Estate. To the east the site abuts Cwmcraehen Industrial Estate. The southern boundary lies in close proximity to the residential area of Nantyglo and to the west the site lies in close proximity to the new Primary Resource Centre and Blaen-y-Cwm Primary School. The industrial estate lies in close proximity to Brynmawr town centre and within a mile of the Heads of the Valleys road. The majority of the estate comprises of privately-owned units with a small number of units which are council owned. The bulk of the premises comprises six large older warehouse units which have been sub-divided. Other land includes several open storage plots.	7,865.07	2,564.97	3,363.57	1,882.47	3,460.4	3,134.51	12 / 63 x 100 = 19.0%	-	17
EMP2.10: Rising Sun Industrial Estate	Blaina	13.9	The industrial estate is located in the Upper Ebbw Fach Valley partly in the ward of Nantyglo (northern section) and partly Blaina (southern section). The industrial estate is located to the south of Ysgol Gymraeg Bro Helyg. To the east of the estate are residential areas and the west is the A467 and open countryside. The industrial estate can be accessed directly off the A467. Units on the site are privately owned, comprising several larger facilities in the north, including large offices for Tai Calon Community Housing, and multiple small terraced schemes in the south.	6,738.32	0	13,559.38	539.8	357.88	236.97	1 / 13 x 100 = 7.69 %	One allocated site - see above	18
EMP2.11: Cwmtillery Industrial Estate	Cwmtillery	7.2	Cwmtillery Industrial Estate is located in the ward of Cwmtillery in the lower Ebbw Fach valley. To the south of the industrial estate is Abertillery Sports Centre and Abertillery Learning Community. To the east and west are residential properties. To the north is open land leading to Jim Owen field. There is a mix of unit sizes on site which are privately owned. The south of the site comprises a large production facility for Tillery Valley Foods, with a mix of smaller terraced/self-contained units to the north.	3,927.2	789.19	11,594.44	49.4	529.63	637.61	1 / 17 x 100 = 5.8%	-	19
EMP2.12: Roseheyworth Business Park	Abertillery	8.5	Roseheyworth Business Park is located in the Lower Ebbw Fach Valley in the ward of Cwmtillery. The business park is located immediately north of Roseheyworth primary school. To the east of the site are residential properties and to the west of the site is the Ebbw River and open countryside. To the north of the site is the area of Bourneville where there are residential properties and commercial businesses. The industrial estate can be accessed directly off the A467. Units on site are council owned with only 1 unit in private ownership. The north comprises a scheme of self-contained industrial units, the south a scheme of self-contained offices.	1,256.65	1,992.7	66,31.35	0	0	292.33	1 / 15 x 100 = 6.66%	One allocated site - see above	21
EMP2.13: Cwm Draw Industrial Estate	Ebbw Vale	14.8	Cwmdraw Industrial Estate is located in the Ebbw Fawr Valley in the ward of Ebbw Vale South. To the north of the site lies the residential area of Newtown. To the east the site abuts open countryside. The south of the site lies in close proximity to the residential areas of T-Llwyn and Waunlwyd. To the east the estate overlooks The Works site. The industrial Estate lies in close proximity to Ebbw Vale town centre at the northern edge and in close proximity to The Works towards the south-east. The site has an upper platform where the old Botcher factory once stood, this has now been demolished. The estate has a mix of council owned and privately-owned units, of varying quality, dispersed along several valley side roads.	313	0	1,315.72	3,264.54	1,383.02	657.63	8 / 26 x 100 = 30.76%	Parcel 1: Flat area of land located towards to the southern end of Cwmdraw industrial estate adjacent to Handmade Shoes. The land has some vegetation in the form of grass and trees. The site has planning history for the development of an industrial unit: c/2011/0266 - full approved; c/2014/0180 - full approved – 0.39 ha Parcel 2: Flat area of land located towards to the southern end of Cwmdraw industrial estate at an elevated level to the rest of the industrial estate. Previously Botcher UK, the factory has since been demolished and the site is vacant. The site has very little vegetation. The eastern boundary of the site abuts Special Landscape Area - Mynydd Carn-y-Cefn & Cefn yr Arail (ENV2.4) – 1.68 ha	15
EMP2.14: Marine Street Industrial Estate	Ebbw Vale	1.3	Marine Street Industrial Estate is located in the Ebbw Fawr valley in the Cwm Ward. The site is located at the southern end of cwm and is surrounded by residential properties on the northern and eastern boundaries, the site also lies in close proximity to the A4046. The western boundary abuts open countryside which is designated as Special Landscape Area ENV2.6 Cefn Manmoel and a Site of Importance for Nature Conservation ENV3.28 Ebbw River South Section. The south of the site is a Scheduled Ancient Monument - Marine Colliery Pumping Engine located on the employment allocation at Marine Colliery. Units on site are council owned. Area comprises four terraces of smaller workshops in the north and a low-grade HGV depot in the south.	387.1	305.69	388.5	428.39	132.93	824.25	5 / 24 x 100 = 20.83%	-	18

ID: Site Name	Location	Size, ha	Description	Floorspace, Sqm							Vacant Parcels of Land on Existing Site	Site Scoring, Max 30
				B1 Office	B1 Other	B2	B8	Other Uses	Total Vacant Units	Site Vacancy Rate (%)		
EMP2.15: Sirhowy Hill Industrial Estate	Tredegar	1.9	The site is located in the Sirhowy ward. The site is accessed off Thomas Ellis Way. Residential properties border the northern and southern boundaries of the industrial estate. To the east is Sirhowy Hill Woodlands which is designated as a Local Nature Reserve. To the west of the site is the A4048. There is a mix of unit sizes on site which are privately owned by Hansteen, with two large units on the frontage (one now a gym) and smaller terraced workshops to the rear.	310.4	0	675.7	134.4	3,113.93	1,088.75	4 / 12 x 100 = 33.33%	-	17
EMP2.16: Bridge Street Industrial Estate	Iron Row, Tredegar	0.9	Bridge Street Industrial Estate is located in the Sirhowy Valley in the ward of Tredegar Central & West. To the west of the industrial estate is Tredegar Town Centre. To the north is Tredegar Business Park and land allocated for employment. To the east is the A4048 and the Sirhowy River. To the south is a builder's yard and a Grade II Listed Building - Tredegar Company Shop. Units on the site are privately owned, and consist of terraced workshops, many in motor trade/repair uses.	347.67	213.41	213.41	189.29	490.85	0	0	-	18
EMP2.17: Noble Square Industrial Estate	Brynmawr	3.0	Noble Square Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Brynmawr and is accessed off Blaenavon Road. To the north and east, the site abuts open countryside which is designated as a Special Landscape Area ENV2.2 Eastern Ridge & Mynydd James and a Site of Importance for Nature Conservation ENV3.93. To the south of the site lies Blaenant Industrial Estate and to the west the site abuts a residential area. The site lies in close proximity to Brynmawr town centre and the Heads of the Valleys Road. There is a mix of unit sizes on site which are privately owned.	0	555.84	3,559.24	0	914.27	0	0	-	21
EMP2.18: Blaina Enterprise Centre	Blaina	-	The industrial estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. The industrial estate is a small industrial with small style units. The industrial estate is located to the south of Ysgol Gymraeg Brohelyg and Tai Calon offices. To the east of the estate is Rising Sun Industrial Estate and residential areas and to the west is the A467 and open countryside. The industrial estate can be accessed directly off the A467. Units on site are privately owned, comprising terraced workshops, many in trade/motor trade use.	161.89	879.29	411.9	317.17	1,227.13	220	3 / 28 x 100 = 10.71%	-	18
EMP2.19: Cwmcrachen Industrial Estate	Brynmawr	6.1	Cwmcrachen Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. The industrial estate is located off Blaenant Road and lies in close proximity to Brynmawr town centre and Lakeside Retail Park. The industrial estate abuts two other industrial estates, Blaenant to the north, Barleyfield to the West. Part of the eastern boundary also abuts a Special Landscape Area - Eastern Ridge & Mynydd James (ENV2.2). To the east of the site is an established Gypsy Traveller site. South of the site lies the residential area of Nantyglo. Units on site are privately owned, comprising two main small-mid-sized industrial and storage units of moderate quality, plus several open storage sites.	0	0	0	0	1491.66	0	0	Parcel 1: A flat area of land which abuts the Gypsy Traveller site. The site has undergone cleaning due to contamination from previous use as a waste site. Planning history on the site includes the erection of a steel framed building (c/2011/0129) which is to be demolished as part of the site clearance (c/2018/0177). – 0.74 ha. Parcel 2: A flat area of land previously used by Lewis Skip Hire to store and rent skips. A planning application was refused in 2012 for the importation, stockpiling and recycling of inert materials and storage and operation of associated grading and crushing machines (retention c/2012/0201) – 0.63 ha Parcel 3: Site is located to the east of the site adjacent to an access road. A flat area of land with foliage and some tree coverage. – 1.53 ha Parcel 4: Site is located to the east of the site adjacent to an access road. Roberto Neckwear is located next to this vacant area of land. The land is flat with foliage and some tree/shrub coverage. – 0.65 ha	12
EMP2.20: Glandwr Industrial Estate	Llanhilleth, Abertillery	6.9	Glandwr Industrial Estate is located in the ward of Llanhilleth in the lower Ebbw Fach Valley. To the west of the industrial estate runs the Ebbw river and the A467, in which the industrial estate can be directly accessed from. To the north of the industrial estate are residential properties. To the south is the residential area of Llanhilleth which also includes Llanhilleth railway station, the Miners Institute and Llanhilleth Industrial Estate. To the east is the B4771 road. All units on site are privately owned, comprising a linier group of mostly modern, good quality terraced industrial units.	237.71	1,666.09	8,346.59	462.18	4464.4	3591.66	14 / 39 x 100 = 35.89%	-	20
EMP2.21: Llanhilleth Industrial Estate	Abertillery	0.74	The industrial estate is located in Abertillery in the ward of Llanhilleth. To the north of the industrial estate is Llanhilleth Bowls Club and Llanhilleth primary school. To the east is the railway line and open countryside and to the west is the Ebbw River and open countryside. The site can be directly accessed off the A467. The industrial estate is small with 17 units. All units on site are council owned, comprising a mix of terraced units of moderate - good quality.	200.68	1,074.88	596.56	94.12	0	333.72	2 / 17 x 100 = 11.76%	-	19

ID: Site Name	Location	Size, ha	Description	Floorspace, Sqm							Vacant Parcels of Land on Existing Site	Site Scoring, Max 30
				B1 Office	B1 Other	B2	B8	Other Uses	Total Vacant Units	Site Vacancy Rate (%)		
-		333.56	-	37,218.13	22,620.01	534,843.62	45,495.74	45,257.88	83,697	-	-	1

Source: Blaenau Gwent CBC/BE Group 2019

- 6.18 The developed floorspace is overwhelmingly dominated by B2 uses, which account for 78 percent of all stock, or 83.5 percent of all stock in B-Class uses. Two thirds of this, 356,088 sqm, is in EMP2.2: Rassau Industrial Estate, including many of the County Borough's s large manufacturing employers.
- 6.19 Only 5.4/5.8 percent of the stock is offices, focused at EMP2.9: Barleyfield Industrial Estate, EMP2.10: Rising Sun Industrial Estate and EMP2.4: Festival Park. B1 light industrial units only account for 3.3/3.5 percent of the stock, focused in EMP2.5: Tafarnaubach Industrial Estate and EMP2.9: Barleyfield Industrial Estate. 6.6/7.1 percent is in B8 use, focused at EMP2.5: Tafarnaubach Industrial Estate and EMP2.4: Festival Park.
- 6.20 6.6 percent of the total stock is in non B-Class uses, with a focus at EMP2.20: Glandwr Industrial Estate, EMP2.15: Sirhowy Hill Industrial Estate and particularly EMP2.5: Tafarnaubach Industrial Estate, although all but three of the 21 employment areas contain some non B-Class stock indicating the strong role such uses (gyms, motor trade, hot food outlets, etc.) have in the local economy.
- 6.21 All existing Employment Areas have been graded using the same standard scoring system as per the Employment Sites (see Appendix 3), but with an allowance for internal conditions (reflecting the fact that these locations contain developed property), as well as external factors. Each site is scored out of 30, made up of six individual measures, each scored out of five – Accessibility, Building and Site Quality and Characteristics (Overall Building Quality and Overall Site Quality), Environmental Factors (internal and external), Market Attractiveness.
- 6.22 Of the Employment Areas, EMP2.1: Tredegar Business Park scores highest at 25, reflecting its good quality stock of modern buildings and strong A-road access. EMP2.4: Festival Park also scores a reasonable 22, again reflecting its good premises offer and central location.
- 6.23 EMP2.19: Cwmcraehen Industrial Estate has by far the lowest score at 12. This reflects the fact that it primarily comprises undeveloped land and open storage, and includes a number of bad neighbour uses, accessed via narrow roads in some cases.
- 6.24 Vacant parcels of land were reviewed in each existing Employment Area, for their redevelopment potential and a range of infill plots identified although most of the

good quality and accessible land is already identified as Employment Sites and discussed above. Several recommendations are made about boundary changes in sites, and these are discussed further in Section 9.0.

6.25 In Table 16, the 21 Employment Areas are grouped into categories, as set out in the SEWSPG Methodology, to better reflect their ranking one against the other. Where a different ranking is recommended from that indicated by the Council, in previous survey work, this is noted. The grading in Table 16 is also different from the hierarchy established in LDP Policies DM10 and EMP2, this is considered separately in Section 9.0.

Table 16 – Employment Area Hierarchy

Type	Typical Characteristics	Typical Importance	Employment Areas
Major Employment Site	Typified by large areas of land capable of accommodating a variety of uses. Sites are predominantly key development areas of a sufficient scale and location attracting individuals and investment from a wide catchment area, whilst affording access to regional/sub-regional markets. Sites are typically occupied by large renowned companies who are features of the national/international markets.	Sites of larger than local Authority-wide importance	EMP2.2: Rassau Industrial Estate EMP2.5: Tafarnaubach Industrial Estate
Secondary Employment Sites	Sites typically have a variety of employment uses and tend to draw individuals and investment from within the local authority area. There may be a small presence of national companies within these estates however established larger local businesses tend to predominate.	Sites of Local Authority-wide Importance	EMP2.1: Tredegar Business Park EMP2.3: Waun y Pound Industrial Estate EMP2.4: Festival Park EMP2.6: Crown Business Park EMP2.8: Blaenant Industrial Estate EMP2.11: Cwmtillery Industrial Estate EMP2.20: Glandwr Industrial Estate

Type	Typical Characteristics	Typical Importance	Employment Areas
Key Local Employment Sites	Sites of significance in the local context, offering important local employment opportunities. Sites are typified by a local SME/start-up presence and will usually have the space to allow such businesses to grow and expand in the short-medium term.	Sub-local Authority Employment Sites	EMP2.9: Barleyfield Industrial Estate EMP2.10: Rising Sun Industrial Estate EMP2.12: Roseheyworth Business Park EMP2.16: Bridge Street Industrial Estate (recommended) EMP2.17: Noble Square Industrial Estate EMP2.21: Llanhilleth Industrial Estate (recommended)
Neighbourhood Employment Sites	Such sites provide employment opportunities for members of the surrounding communities. These sites are typically small in scale and contain a small number of businesses. Such businesses tend to serve the immediate area and do not have a wide catchment. This definition extends to include small rural employment sites.		EMP2.7: Pond Road Workshops EMP2.13: Cwm Draw Industrial Estate EMP2.14: Marine Street Industrial Estate EMP2.15: Sirhowy Hill Industrial Estate EMP2.18: Blaina Enterprise Centre EMP2.19: Cwmcrachen Industrial Estate

Source: Blaenau Gwent CBC/BE Group 2019

Summary

- 6.26 Blaenau Gwent's baseline land supply comprises 50.0 ha, as allocated Policy EMP1 'Employment Allocations' of the Blaenau Gwent County Borough Council Local Development Plan up to 2021.
- 6.27 However, the 50.0 ha supply includes areas of land which are likely to be retained/developed for infrastructure or non-employment uses. Removing such land reduces the net supply to 45.81ha.
- 6.28 Of that Realistic Supply, 85 percent (39.1 ha) is found in the Ebbw Vale. Only 4.4 ha (9.6 percent) is found in Tredegar, comprising the two sites at Crown Business Park and EMP 1.2 Land at Tredegar Business Park. The remaining land is found at Upper and Lower Ebbw Fach.

- 6.29 Most of the supply could meet the needs of both office and industrial occupiers. EMP1.1 Land at Festival Park and EMP1.3 Land at Rising Sun Industrial Estate are the locations best suited for meeting B1 requirements. Site scoring shows significant variation in the quality of the land supply. Prime sites include MU2 The Works' Business Hub, EMP 1.2: Land at Tredegar Business Park and EMP1.10 Land at Roseheyworth Business Park.
- 6.30 EMP1.6: Land at Waun-y-Pound scores most poorly, this reflects the fact that there are some questions as to whether historic uses here have impacted on deliverability of the land.
- 6.31 A review of Blaenau Gwent's 21 identified Employment Areas indicates that most are established industrial areas, with property offers focused on B2 stock. Built quality and occupancy rates vary, but overall the developed employment stock is reasonably well occupied. One issue is the presence of non B-Class employment uses, which are found on all but three of the 21 areas.

7.0 FUTURE LAND REQUIREMENTS REVIEW

Introduction

7.1 The Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan' states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods, and highlights that these should include historic land take-up and future employment and population change. The County Borough Council has internally completed land need calculations using both models, and the results are reviewed here. Neither approach provides a definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and they are considered in the context of the market overview undertaken as part of this study.

7.2 The two models are:

- Practice Guidance Method 1: Past Building Completions

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

- Practice Guidance Method 2: Labour Demand Forecasting

This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on jobs to floorspace density, which in turn can be translated into the projected land need. This scenario uses as its base Oxford Economics forecasts, which account for the most recent national and regional socio-economic and political changes.

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

undertaken to assess how the two trends in the County Borough of Blaenau Gwent are related.

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

- 7.3 It should be noted that these are 'policy-off' scenarios in that they do not account for any strategic policy initiatives. Blaenau Gwent Council has the policy aspiration to deliver 3,375 extra jobs in the County Borough, to 2033, based on population projections, the projected impacts of the Ebbw Vale Enterprise Zone (1,500 extra jobs), reducing out commuting, increasing the economic activity rate and reducing the employment rate. To allow for the impact of this policy target, a 'policy on' version of Practice Guidance Method 2 is also provided.

Policy Off Models

Practice Guidance Method One: Past Building Completions

- 7.4 Blaenau Gwent Council has provided LDP monitoring data on past employment land completions between 2007 and 2018. This is set out in Table 17. As can be seen, most completions in that time were for B2 and B8 uses. No individual B1 office completions were recorded over 2007-2018, which is surprising but not out of character for the overwhelmingly industrial nature of the County Borough's property supply. It should be noted that this only means that no new, majority office buildings have been completed, or converted from other uses, over this time. It does not preclude the possibility that some B1 office space has been provided as an ancillary use in industrial or warehouse properties. The total completions during that period are:

- B1 Office: None
- B1/B2 Industrial: 14,728 sqm or 1338.9 sqm/year.
- B8 Warehousing: 6,589 sqm or 599.0 sqm/year.

Table 17 –Building Completions, By Year, Sqm

	B1 - Office	B1 – Light Industry	B2	B8	Total
1998-2005*	6,583	Incorporated with B2	(39,900)	416	(32,901)
2005	Data Gap				
2006	Data Gap				
2007-2014	-	2,265.5	8,475.5	3,399	14,140
2014-15	-	300	300	300	900
2015-16	-	312	1,084	2,430	3,826
2016-17	-	-	-	460	460
2017-18	-	-	1,991	-	1,991
Total (2007-18 only)	-	2,877.5	11,850.5	6,589	21,317
Total (all years)	6,583		(25,172)	7,005.0	(11,584.0)

*Source: Blaenau Gwent County Borough Employment Sites and Premises Study, UPS (2007)

Source: Other Data, Blaenau Gwent CBC, 2019

7.5 More historic completions data, for the years 1998-2005, is available in Blaenau Gwent's County Borough Employment Sites and Premises Study (2007) (See Table 17). However, that data is not comparable with more recent completions' statistics for two reasons:

- The Employment Sites and Premises Study is based on an analysis of total floorspace change in the County Borough, as registered in Valuation Office Data, rather than just completions or losses recorded by the Council
- The Employment Sites and Premises Study data records a massive reduction in B2 floorspace over 1998-2005. In part at least, this will reflect the demolition of the main Ebbw Vale Steelworks site in 2002, a unique event in the County Borough's recent history. Including this loss in the figures will lead to a negative need figure for B1/B2 floorspace/land, projecting forward, which will not reflect all the development which has occurred in Blaenau Gwent since 2007.

7.6 Thus, the Buildings Completions forecast, discussed below, only uses the monitoring data for 2007-2018.

7.7 Using these take-up rates and applying it to the period 2018-2033 (15 years), the County Borough requires 7.12 ha of land (see Table 18).

Table 18 – Past Building Completions Forecast

Use	2007-2018 Annual Average Employment Completions, sqm	2018-2033 Floor Space Requirement, sqm	Plot Ratio at 40 percent Coverage, ha
Offices (B1)	-	-	-
Industrial (B1/B2)	1338.9	20,083.5	5.02
Warehouse (B8)	599.0	8,385.0	2.10
Total	1,937.9	28,468.5	7.12

Source: BE Group, Blaenau Gwent CBC, 2019

- 7.8 The land need figures are based on a plot ratio of 40 percent (i.e. assuming that each 10,000 sqm/one hectare of land provides 4,000 sqm of single storey floorspace for industrial, up to two storey for offices).
- 7.9 A 40 percent plot ratio would, as noted in Welsh Practice Guidance, be standard for development on modern industrial estates and business parks, with other land used for car parking, landscaping, open storage and the 40 metre turning circle HGVs require. Higher ratios, normally up to 80 percent, would be applied only to town or city centre schemes, mostly multi-storey offices. High density industrial/office/hybrid schemes are likely at The Works, but elsewhere space will be provided in industrial estates and business parks, at more traditional densities.
- 7.10 The County Borough should also have a minimum buffer of five years supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2033 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period. Based on the historic take-up trend this would generate a further land need of 2.42 ha, i.e.
- Office: None
 - Industrial (B1/B2): 1338.9 sqm/year x 5 (years) = 6,694.5 sqm. Land (ha) at 40 percent cover = 1.67 ha
 - Warehousing (B8): 599.0 sqm/year x 5 (years) = 2,995 sqm. Land (ha) at 40 percent cover = 0.75 ha
 - Total: 9,689.5 sqm. **2.42 ha.**

- 7.11 Added to the 2033 need figure, this increases the requirement to 9.54 ha, i.e.
- B1/B2: 5.02 ha + 1.67 ha = 6.69 ha
 - B8: 2.10 + 0.75 ha = 2.85 ha
 - Total: **9.54 ha**

Practice Guidance Method Two: Labour Demand Forecasting

- 7.12 This scenario uses as its base the Oxford Economics forecast modelling, which was initially analysed in Section 3.0, Paras 3.17-3.19. The forecasts project employment change over 2018-2033 and include annual employment figures for the County Borough from 1991. The forecasts can be used to calculate the future need, and the past jobs change can be used to calculate the assumed land need over that period for comparison with the historic take-up over the same period.
- 7.13 This section deals with calculation of future needs, as completed by the County Borough Council using this data.
- 7.14 The forecasts break down employment to the level of 18 industry sectors (Table 19) although not all are relevant to this Employment Land Review, particularly agriculture, forestry and fishing.
- 7.15 Using the Oxford Economics forecasts, Blaenau Gwent County Borough Council and BE Group have forecast employment floorspace and employment land requirements for Blaenau Gwent County Borough. Reflecting Welsh Practice Guidance, the methodology of calculating this requirement is as follows:
- Identify which industry sectors are likely to take up employment land, including the proportion of that sector's employment on B-class employment land (Table 19).
 - Adopt appropriate employment densities to convert employment numbers to floorspace demand (see Table 20).
 - Adopt a plot ratio to convert floorspace to employment land demand (see Table 20).

Table 19 – Labour Demand Forecast, 2018-2033 – Policy Off

Broad Sector Groupings	Difference (jobs) 2018 - 2033	Land Use	Weighting	Difference (jobs) by use 2018 - 2033
Non B-Class Uses				

Agriculture, Forestry and Fishing	(4)	Non B	-	-
Mining and Quarrying	(4)	Non B	-	-
Wholesale and retail trade	19	Non B	-	-
Accommodation and Food Services	13	Non B	-	-
Arts, entertainment and recreation	91	Non B	-	-
B1 Mostly Office Uses				
Administrative and support service	76	B1	1	76
Information and Communication	17	B1	1	17
Professional, scientific and technical activities	34	B1	1	34
Real estate activities	6	B1	1	6
Financial and Insurance Activities	(14)	B1	1	(14)
Public Administration	(192)	B1	0.22	(42)
Health	126	B1	0.22	28
Education	(203)	B1	0.22	(45)
Other service activities	9	B1	0.22	2
Total	-141	-	-	62
B2/B8 Uses				
Manufacturing	(954)	B2	1	(954)
Utilities	(40)	B2	0.26	(10)
Construction	89	B2	0.26	23
Transport and Storage	(13)	B8	0.48	(6)
Total	-918	-	-	(947)

Source: Blaenau Gwent CBC/BE Group, 2019 and Oxford Economics, 2019

- 7.16 Table 20 takes the total net jobs figures for B1 and B2/B8 uses identified above – 62 for B1 and (947) for B2/B8 – and converts them first into floorspace (sqm) by the rates per worker shown. It then converts that floorspace into land (hectares) at 40 percent or 4,000 sqm/hectare coverage, i.e. dividing the floorspace by 4,000 sqm.

Table 20 – Floorspace and Land Requirement Forecasts – Policy Off

Offices (B1)	Based on 62 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
12 sqm per worker	744	0.19
16 sqm per worker	992	0.25
20 sqm per	1,240	0.31

worker		
Industrial (B2/B8)	Based on 947 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
50 sqm per worker	(47,350)	(11.84)
67 sqm per worker	(63,449)	(15.86)
85 sqm per worker	(80,495)	(20.12)

Source: Blaenau Gwent CBC/BE Group, 2019

7.17 Table 20 shows the results of the Model Two forecasting. As noted for Model One, the 40 percent ratio is likely to be more applicable to Blaenau Gwent given that most development, including office development, is expected to take place on suburban/out of town industrial estates/business parks rather than in town centre locations. It also reflects Welsh Practice Guidance.

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

Offices

- 12 sqm per worker – Would be applicable to a quite high-density service sector operation such as a call centre or town centre financial services office. While some facilities in Blaenau Gwent, such as at MU2: The Works, will have comparable densities, most new development in the Employment Areas, is likely to be delivered at a lower density.
- 16 sqm per worker – Mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as an average floorspace/worker rate for office uses in Wales. It reflects a mix of town centre and business park density levels.
- 20 sqm per worker – A comparably low employment density, reflective of more specialist facilities such as design studios, co-working and maker spaces. These have a limited presence in Blaenau Gwent.

Industrial

- 50 sqm per worker – This high density relates to B1 light industrial uses, which are found throughout the employment areas of Blaenau Gwent, but does not allow for larger B2/B8 options.

- 67 sqm per worker – Mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as a average floorspace/worker rate for industrial/warehouse uses in Wales. Allows for a mix of high-density light industrial and mid-density B2/B8 uses.
- 85 sqm per worker – This low-density level would be most applicable to the largest B8 logistics facilities, National and Regional Distribution Centres. In the CCR these are mostly found along the M4 Corridor rather than in the Head of the Valleys.

7.19 Based on the above, the recommended land needs for Model Two – Policy Off are thus:

- B1 Offices – 62 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 0.25 ha
- B2/B8 Industrial – 947 less jobs at 67 sqm per worker and a 40 percent plot ratio = (15.86 ha)
- Total net need = **(15.61 ha)**.

7.20 The above model suggests that Blaenau Gwent requires no employment land to 2033 and, indeed, could reuse some industrial land for other uses.

7.21 However, in terms of B1/B2/B8 land, if the loss of manufacturing jobs is discounted and only sectors predicted to gain jobs are considered (163 extra B1 jobs, 23 extra B2/B8 jobs) the need becomes:

- B1 Offices – 163 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 0.65 ha
- B2/B8 Industrial – 23 extra jobs at 67 sqm per worker and a 40 percent plot ratio = 0.39 ha
- Total net need = **1.04 ha**.

Policy On

Practice Guidance Method Two: Labour Demand Forecasting

7.22 Blaenau Gwent Council has the policy aspiration to deliver 3,375 extra jobs in the County Borough, to 2033, based on population projections, reducing out commuting, increasing the economic activity rate and reducing the employment rate. It also incorporates 1,500 extra jobs estimated to be generated from the Enterprise Zone programme, over the next decade.

7.23 To consider the impact of this policy goal the following model incorporates those 3,375 jobs into the Oxford Economics forecasting to provide an updated Method Two output. However, information on the nature of those 3,375 extra jobs is limited at this stage, thus, to incorporate them into a forecast model, several assumptions need to be made:

- It is assumed that 100 percent of the 3,375 jobs will be delivered in the forecast period to 2033
- Displacement – It is assumed that the assessment of 3,375 extra jobs has already made allowances for the displacement of jobs within Blaenau Gwent
- Sectoral Split – To correctly assess growth, the 3,375 jobs need to be ascribed to sectors. The focus of the Ebbw Vale Enterprise Zone and the wider County Borough economy is manufacturing. However, forecast jobs growth, as shown in Table 19 above, is in office sectors. The Enterprise Zone, under Tech Valleys management, is also likely to have a stronger focus on sectors such as ICT and on research and development, which will employ service/professional sector staff. Manufacturing companies will also employ administrative workers. Thus, it is assumed approximately a quarter of the jobs, 800, would be in office sectors and 2,575 in manufacturing. The 800 office jobs are split evenly between professional, scientific and technical activities; information and communication and administrative and support services.

7.24 The Labour Demand Forecast resulting is set out in Tables 21 and 22, using the following method:

- The sectoral figures from the Labour Demand Forecast, 2018-2033, as set out in Table 19 above, are increased by the amounts described above to add on the 3,375 extra jobs which policy on activity is expected to generate.
- The increased total net jobs figures for B1 and B2/B8 uses identified – 862 for B1 and 1,628 for B2/B8 – are converted first into floorspace (sqm) by the rates per worker shown. That floorspace is then converted into land (hectares) at 40 percent or 4,000 sqm/hectare coverage, i.e. dividing the floorspace by 4,000 sqm.

Table 21 – Labour Demand Forecast, 2018-2033 – Policy On

Broad Sector Groupings	Difference (jobs) 2018 - 2033	Land Use	Weighting	Difference (jobs) by use 2018 - 2033
Non B-Class Uses				
Agriculture, Forestry and Fishing	(4)	Non B	-	-
Mining and Quarrying	(4)	Non B	-	-
Wholesale and retail trade	19	Non B	-	-
Accommodation and Food Services	13	Non B	-	-
Arts, entertainment and recreation	91	Non B	-	-
B1 Mostly Office Uses				
Administrative and support service	342	B1	1	343
Information and Communication	283	B1	1	283
Professional, scientific and technical activities	301	B1	1	301
Real estate activities	6	B1	1	6
Financial and Insurance Activities	(14)	B1	1	(14)
Public Administration	(192)	B1	0.22	(42)
Health	126	B1	0.22	28
Education	(203)	B1	0.22	(45)
Other service activities	9	B1	0.22	2
Total	658	-	-	862
B2/B8 Uses				
Manufacturing	1621	B2	1	1621
Utilities	(40)	B2	0.26	(10)
Construction	89	B2	0.26	23
Transport and Storage	(13)	B8	0.48	(6)
Total	1657	-	-	1628

Source: Blaenau Gwent CBC/BE Group, 2019 and Oxford Economics, 2019

Table 22 – Floorspace and Land Requirement Forecasts – Policy On

Offices (B1)	Based on 862 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
12 sqm per worker	10,344	2.59

16 sqm per worker	13,792	3.45
20 sqm per worker	17,240	4.31
Industrial (B2/B8)	Based on 1,628 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
50 sqm per worker	81,400	20.35
67 sqm per worker	109,076	27.27
85 sqm per worker	138,380	34.60

Source: Blaenau Gwent CBC/BE Group, 2019

7.25 Based on the above, and using the same assumptions on floorspace ratio/plot area as previously, the recommended land needs for Method Two – Policy On are thus:

- B1 Offices – 862 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 3.45 ha
- B2/B8 Industrial – 1,628 additional jobs at 67 sqm per worker and a 40 percent plot ratio = 27.28 ha
- Total net need = **30.73 ha**.

7.26 3,375 jobs represent a sizable additional growth for Blaenau Gwent, when the Policy-Off model only suggests the County Borough will gain 186 jobs to 2033. It is unsurprising that Policy-On Modelling indicates a far larger requirement, 30.73 ha, particularly as the previous forecast of a loss of B2/B8 employment has been transformed into a net gain of 1,628 jobs.

7.27 In terms of B1/B2/B8 land, if the remaining forecast jobs losses is discounted and only sectors predicted to gain jobs are considered (963 extra B1 jobs, 1,644 extra B2/B8 jobs) the need becomes:

- B1 Offices – 963 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 3.85 ha
- B2/B8 Industrial – 110,148 extra jobs at 67 sqm per worker and a 40 percent plot ratio = 27.54 ha
- Total net need = **31.39 ha**.

Policy On Forecast – 1,500 jobs

7.28 As noted above, the Enterprise Zone is, by itself, expected to generate 1,500 extra jobs to 2033. Using just the gain from the Enterprise Zone, not allowing for additional growth from other sources, and using the same assumptions on floorspace ratio/plot area as previously for Model Two – Policy On the outputs are:

- B1 Offices – 662 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 2.65 ha
- B2/B8 Industrial – 48 less jobs at 67 sqm per worker and a 40 percent plot ratio = (0.80 ha)
- Total net need = **1.85 ha**.

7.29 The net outcome is a positive land need, albeit a much lower positive figure than was the case for 3,375 extra jobs. This reflects the fact that while the B1 and B2/B8 sectors gain additional jobs in this scenario there is still a net loss of B2/B8 jobs.

7.30 In terms of B1/B2/B8 land, if the loss of manufacturing jobs is discounted and only sectors predicted to gain jobs are considered (662 extra B1 jobs, 23 extra B2/B8 jobs) the need becomes:

- B1 Offices – 662 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 2.65 ha
- B2/B8 Industrial – 23 extra jobs at 67 sqm per worker and a 40 percent plot ratio = 0.39 ha

Total net need = **3.05 ha**

Comparing Methods One and Two

7.31 The above forecasting provides two models which predict positive growth, to 2033, and one, Method Two - Policy-Off, which forecasts net losses. However, this Study would argue that the Method Two - Policy-Off forecast is unrealistic due to several factors, including that:

- While forecasting suggests net declines in B2/B8 jobs locally, the market assessment completed in this Study suggests that demand is overwhelmingly for industrial and warehouse space, while office requirements are modest.
- Will the decline in jobs lead to the release of land? Experience suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to

automation, those new automated processes will still require land on which to operate.

- Land take-up/property needs can be for different reasons such as modernisation or geographic relocation, or land banking for future needs.
- Expansion may also be within existing premises or on expansion land not accounted for in land allocations.

7.32 To test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for the period 2007-2018 and compared to the actual land take-up during that period (see Table 23).

Table 23 – Employment Land Take-Up/Employment Change Comparison

Broad Sector Groupings	Difference (jobs) 2007 - 2018	Land Use	Weighting	Difference (jobs) by use 2007 - 2018
Non B-Class Uses				
Agriculture, Forestry and Fishing	49	Non B	-	-
Mining and Quarrying	5	Non B	-	-
Wholesale and retail trade	(814)	Non B	-	-
Accommodation and Food Services	146	Non B	-	-
Arts, entertainment and recreation	(4)	Non B	-	-
B1 Mostly Office Uses				
Administrative and support service	394	B1	1	394
Information and Communication	117	B1	1	117
Professional, scientific and technical activities	136	B1	1	136
Real estate activities	324	B1	1	324
Financial and Insurance Activities	107	B1	1	107
Public Administration	267	B1	0.22	59
Health	(193)	B1	0.22	(42)
Education	(167)	B1	0.22	(37)
Other service activities	(83)	B1	0.22	(18)
Total	902	-	-	1,140
B2/B8 Uses				
Manufacturing	(1,356)	B2	1	(1,356)

Broad Sector Groupings	Difference (jobs) 2007 - 2018	Land Use	Weighting	Difference (jobs) by use 2007 - 2018
Utilities	44	B2	0.26	11
Construction	(482)	B2	0.26	(125)
Transport and Storage	(121)	B8	0.48	(58)
Total	(1,915)	-	-	(1,528)

Source: Blaenau Gwent CBC/BE Group, 2019 and Oxford Economics, 2019

Table 24 – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 1,140 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
16 sqm per worker	18,240	4.56
Take Up 2007-2018		-
Industrial (B2/B8)	Based on 1,528 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
67 sqm per worker	(102,376)	(25.59)
Take Up 2007-2018	21,317 (including B1 industrial)	5.33

Source: Blaenau Gwent CBC/BE Group, 2019

- 7.33 The trend shows that policy off jobs forecasting is not an accurate method of calculating land. Forecasting suggests that over 2007-2018 Blaenau Gwent should have gained 4.56 ha of B1 office land but lost 25 ha of B2/B8 land. In reality, modest growth of 5.33 ha was recorded, all for industrial and warehousing uses.

Summary

- 7.34 The three alternative forecast options have been produced and considered for the period of 2018-2033, reflecting Welsh Government Practice Guidance. The calculations for each are summarised in Table 25 and need is compared to the County Borough's realistic employment land supply, identified in Section 6.0, of 45.81 ha.
- 7.35 The figures allow for a minimum five-year buffer to allow for choice and potential change in needs during the period as well as providing some accounting for further possible losses in the supply. This can be seen as the minimum land requirements and separate consideration to employment land provision in the LDP has been given in the conclusion and recommendation sections below, reflecting on the employment land supply and regeneration objectives of the Plan.

- 7.36 As can be seen from Table 25 the County Borough does have sufficient land to meet projected growth under these scenarios, although the surplus is much smaller under Practice Guidance Method Two: Labour Demand Forecasting (Policy On).
- 7.37 If employment-based forecasts are taken then the quantitative surplus ranges from 3.96-61.34 ha, reflecting whether an allowance is made for the ‘policy on’ growth of some 3,375 jobs and if, where employment declines there is a corresponding reduction in land needs.
- 7.38 Method Two – Policy Off forecasts a negligible or indeed negative land requirement. However, from the market assessment and reviewing the historic trends in employment change and land take up, it is argued that this approach underestimates real world employment land needs. When a comparison of past employment change over the period 2007-2018 is made, actual land take-up is much higher, albeit only for B2/B8 uses.

Table 25 – Land Forecast Models – Summary

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
Practice Guidance Method One: Past Building Completions	45.81	B1 Office: - B1/B2 Ind: 5.02 B8: 2.10 Total: 7.12	B1 Office: - B1/B2 Ind: 1.67 B8: 0.75 Total: 2.42	B1 Office: - B1/B2 Ind: 6.69 B8: 2.85 Total: 9.54	36.27	Based on historic (11 years) take-up of 1,937.9 sqm/year at a 40 percent plot ratio
Practice Guidance Method Two: Labour Demand Forecasting (Policy Off)	45.81	<i>Net Change</i> B1: 0.25 B2/B8: (15.86) Total: (15.61)	<i>Net Change</i> B1: 0.08 B2/B8: - Total: 0.08	<i>Net Change</i> B1: 0.33 B2/B8: (15.86) Total: (15.53)	<i>Net Change</i> 61.34	Policy Off Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors
		<i>Growth Only</i> B1: 0.65 B2/B8: 0.39 Total: 1.04	<i>Growth Only</i> B1: 0.22 B2/B8: 0.13 Total: 0.35	<i>Growth Only</i> B1: 0.87 B2/B8: 0.52 Total: 1.39	<i>Growth Only</i> 44.42	
Practice Guidance Method Two: Labour Demand Forecasting (Policy On)	45.81	<i>Net Change</i> B1: 3.45 B2/B8: 27.28 Total: 30.73 <i>Growth Only</i>	<i>Net Change</i> B1: 1.15 B2/B8: 9.09 Total: 10.24 <i>Growth Only</i>	<i>Net Change</i> B1: 4.60 B2/B8: 36.37 Total: 40.97 <i>Growth Only</i>	<i>Net Change</i> 4.84 <i>Growth Only</i>	Policy On – 3,375 additional jobs Based on <i>Net Change</i> : Projected employment

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
		B1: 3.85 B2/B8: 27.54 Total: 31.39	B1: 1.28 B2/B8: 9.18 Total: 10.46	B1: 5.13 B2/B8: 36.72 Total: 41.85	3.96	change across sectors <i>Growth Only:</i> Projected growth sectors <i>N.B. if a lower Policy-On jobs growth figure of 1,500 is assumed, solely from the Enterprise Zone, needs become 1.85 ha in net need, 3.05 ha from growth only need. This equates to:</i> <i>Net change: 43.96 ha</i> <i>Growth only: 42.76 ha</i>

Source: Blaenau Gwent CBC/BE Group, 2019

*Realistic land supply

7.39 In terms of the other two forecasts it is argued that Practice Guidance Method One: Past Building Completions represents **the minimum land requirement (9.54 ha)** Blaenau Gwent will have if none of the policy on programmes were realised and the County Borough's growth remained unchanged from the last decade. Practice Guidance Method Two: Labour Demand Forecasting (Policy On) represents **the maximum land requirement (40.97-41.85 ha)** generated if all policy on programmes are realised to their fullest extent, with extensive local job generation and growth, particularly in B2/B8 sectors. Actual growth, to 2033, may thus fall between the two.

8.0 CONCLUSIONS

Introduction

- 8.1 This study has included a wide-ranging look at the factors affecting the County Borough of Blaenau Gwent's economy, with particular reference to those that are likely to affect the future need for land and property within the County Borough. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 9.0.
- 8.2 The study has been undertaken in line with Welsh Government guidance, including Planning Policy Wales, TAN 23 and reflecting 'Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan'. It updates the LDP evidence base, on matters of B-Class land need and supply.

Economic Profile

- 8.3 The socio-economic profile of Blaenau Gwent shows modest population declines over the last five years. This contrasts with the 3.7 percent growth for the UK, the 2.4 percent growth for the wider city region, and the 1.7 percent growth for Wales.
- 8.4 74.5 percent of the working age population is in employment, below the UK (78.3 percent), Wales (76.7 percent) and CCR (77.2 percent) averages. Blaenau Gwent's unemployment rate (amongst those aged 16+) is at 4.7 percent, slightly higher than national (4.5 percent) and Welsh (4.2 percent) levels but below the city region level (5 percent).
- 8.5 Skills are an issue in Blaenau Gwent. The qualification profile of the County Borough indicates that the proportion of residents educated at degree level and above is 13 percent below the City Region average (24 percent vs 37 percent in CCR), while the level of 'no qualifications' is above average, at 15 percent vs 9 percent in CCR.
- 8.6 As of 2017, Blaenau Gwent's economy supported 18,500 jobs. In the last five years, employment has declined by 12 percent, against the growth observed in the City Region and Wales as a whole. That reduction is primarily driven by net losses in health sector employment.
- 8.7 The largest sector in Blaenau Gwent's economy is manufacturing, with 4,000 jobs (21 percent of total jobs), 2.7 times the proportional size of the manufacturing sector in Great Britain. This reflects the fact that while Blaenau Gwent may have lost much of

its traditional industry, it has been successful in attracting new high value manufacturing and production businesses.

- 8.8 Health and Education are respectively the second and fourth largest sectors in the economy, and together with Public Administration (fifth largest sector), the public sector makes up a considerable share of employment. This is typical for Wales but large for Great Britain. There is however indication that some creative and high-value service sectors, such as ICT, Finance and Professional Services, which are under-represented in the economy, are growing fast, presenting an opportunity for diversification into a modern, service-based economy.
- 8.9 When comparing the distribution of local jobs (workplace) against the distribution of employment by residents - which can take place within as well as outside Blaenau Gwent, – there is a significant labour demand/supply imbalance in the manufacturing sector, with some 4,500 resident jobs against some 3,500 workplace ones. Theoretically if all residents working in manufacturing wanted to work within the local authority boundary, only three quarters would be accommodated.
- 8.10 Oxford Economic forecasting, acquired for this study indicates that employment in Blaenau Gwent is projected to decline by 4.5 percent to 2033, a drop of 943 jobs, from 20,800 in 2018 to 19,900 in 2033. The decline is largely driven by loss of jobs in the manufacturing sector, forecast at around 954 jobs less by 2033, a trend common to forecasts elsewhere. Construction, Administrative and support services and Professional services are expected to grow respectively by 89 jobs, 76 jobs and 34 jobs. Overall, B1 office sectors will gain 163 jobs.
- 8.11 In terms of commuting, Blaenau Gwent has a modest level of self-containment. Overall, 52 percent of residents in employment work within the local authority area. The strongest commuting relationships are with Monmouthshire, Caerphilly and Torfaen. In terms of migration, younger families appear to be leaving the Borough while the over 40s are attracted in

Property Market Assessment

- 8.12 In the short term, national and regional property markets remain subdued in advance of the (current) Brexit deadline of 31st October. Macro-economic growth, after that time will clearly depend on the nature of the UK's exit from the European Union and how rapidly revised trading arrangements can be put into place. It is worth noting that whilst the Bank of England has recently down-graded immediate UK growth forecasts

for 2019 and 2020 to 1.3 percent inflation appears under control and the UK labour market is considered to be healthy, indeed with employment at its highest rate for many years. Mid and long-term forecasts thus remain cautiously optimistic.

- 8.13 Property requirements sourced through the Welsh Government, are for primarily industrial space. Of those enquiring, around a quarter sought industrial/warehouses units of 464 sqm or less. However, 42.7 percent sought units of 2,324 sqm or more. The preference for larger space will reflect the fact that many of those enquiring through Welsh Government will be established firms with areas of search which will extend across multiple local authority areas. However, it is still worth noting that Blaenau Gwent does feature regularly within those wider search areas. Almost half of office enquiries in Blaenau Gwent were for units of 464 sqm or less. In terms of land, again there are mixed preferences for smaller sites, up to around 4 ha and larger plots, generally exceeding 10 ha.
- 8.14 County Borough occupancy rates, measured against available and marketed properties, range from 91 to 98 percent, pointing to a lack of choice and availability for businesses, for all property types.

Industrial Market

- 8.15 The Blaenau Gwent commercial property market is predominantly focused on the industrial sector with a relatively strong manufacturing presence, albeit operating from a low-cost property base. Much of the available property is also relatively dated and in need of refurbishment although investment has occurred in some privately-owned schemes such as Tafarnaubach Industrial Estate. Rental values for general industrial units are typically around £19.40-£26.90/sqm (£1.80 - £2.50/sqft), rising to £32-£43/sqm (£3.00-£4.00/sqft) for refurbished options.
- 8.16 Market demand is strongest among local employers predominantly for units up to 500 sqm, although enquiries can extend up to 1,500 sqm. Small workshop space is in relatively high demand with rents reaching £43.00-£48/sqm (£4.00-£4.50/sqft) reflecting the smaller unit size; with key schemes including Cwm Small Business Centre, Ebbw Vale.
- 8.17 More general industrial enquiries tend to have a much wider (South Wales) search area. There are regular general enquiries around for industrial space in the range of 4,600-9,300 sqm but very few available properties across the region and rarely

anything immediately available in Blaenau Gwent. In particular, there is a lack of freehold options which established modern companies are increasingly seeking.

- 8.18 As of summer, 2019, there was 50,200 sqm of industrial space is vacant and on the market. Marketed supply is mostly found in Tredegar and Ebbw Vale, with few options elsewhere. The majority of the units available are under 5,000 sqm and particularly between 201-500 sqm in size. 72 percent of the marketed space is available to let only.

Warehouse Market

- 8.19 The primary focus of logistics demand is the M4 corridor around Chepstow and Newport; albeit with increasing competition from the M5 at Severnside. While B2 General Industry dominates in Blaenau Gwent, most B2 units, will include a B8 element for goods shipping. In this way, proximity to the A465 is of significant value, especially for those operators serving the Midlands market.
- 8.20 Looking forward, opportunities could exist to attract distribution operators to Blaenau Gwent as an alternative to the increasingly congested M4 corridor. This would suit operators who link South Wales with the wider Midlands area (as an alternative to the M5 corridor) and enabling “break-of-bulk” and onward distribution in smaller vehicles and last-mile connection.

Office Market

- 8.21 Cardiff continues to dominate the regional office market, with only Newport seen as capable of delivering a significant alternative offer in the CCR. In comparison, the office market in Blaenau Gwent is poorly developed, reflecting the largely industrial nature of the business environment and labour market skills. Office demand has historically been localised to local services utilising small office suites above shops in the town centres and public sector occupiers.
- 8.22 The regeneration of the former steel works in Ebbw Vale has, however, stimulated positive market demand for small scale hybrid office/tech space, including UK Steel’s Innovation Centre. A number of recent decisions look set to further stimulate the market, including that by Thales to establish a new Cyber Security Research Centre in Ebbw Vale and ongoing Welsh and Local Government investments in The Works.

- 8.23 Only four offices are on the market, mainly between 500-1,000 sqm in size. Two of these units are available solely to lease, one is for sale and one has the option to buy or let.

Stakeholder Engagement

- 8.24 Consultation with various stakeholders was conducted as part of the market research, which comprised key employers and landowners/developers and public-sector organisations. Engagement with neighbouring authorities is progressed through the Regional Study.
- 8.25 Welsh Government officers are concerned about the weak perceptions of many local authority areas in CCR as places for business investment. There is a need for local economies to move further up value chain from low-end manufacturing, to higher value options, still mostly in industrial sectors.
- 8.26 In Blaenau Gwent, the main policy tool for driving forward change is the Ebbw Vale Enterprise Zone. To date, delivery in the Enterprise Zone has been slow. This is felt to reflect the level of site works and infrastructure needed to bring sites forward, rather than a lack of demand. A number of key projects are now being progressed and are discussed further in Sections 5.0 and 6.0.
- 8.27 Stakeholders argue that there are significant supply shortages across Blaenau Gwent, particularly for smaller properties. This issue is well established and gives Enterprise Zone partners confidence in bringing forward new space on a speculative basis.
- 8.28 Generally, stakeholders were positive about Blaenau Gwent's economic future. In addition to the Welsh Government investment there are strong trends of inward investment, with new companies encouraged into the area by its skilled labour force; affordable property; high quality environment and strong strategic transport links. Blaenau Gwent is also identified as having the second highest business start-up rate in Wales. The high level of start-ups brings demand for smaller industrial units of 0-100 sqm, although there are also shortages in the 5,000 sqm range to allow larger firms to expand.
- 8.29 Businesses consulted see Blaenau Gwent as a logistically sound location, with good motorway and A-road links providing reasonable access to local, Welsh and national markets. No respondents noted skills issues, and many praised the well skilled local

workforce. Macro-economic issues may be suppressing some short-term growth, although consulted companies have met their immediate expansion needs.

Existing Employment Areas

- 8.30 The County Borough's existing 21 Identified Employment Areas have been appraised and graded following the methodology set out in 'Employment Paper for SEWSPG: A Common Methodology for Undertaking Audits of Employment Sites as Part of an Employment Land Review in South East Wales' (Report of the Pathfinder Group, 2017). Please note grading linked to the Council's own LDP hierarchy is provided in the Recommendations Section 9.0. The results of that Grading can be found in Table 26.

Table 26 – Employment Area Hierarchy

Type	Typical Characteristics	Typical Importance	Employment Areas
Major Employment Site	Typified by large areas of land capable of accommodating a variety of uses. Sites are predominantly key development areas of a sufficient scale and location attracting individuals and investment from a wide catchment area, whilst affording access to regional/sub-regional markets. Sites are typically occupied by large renowned companies who are features of the national/international markets.	Sites of larger than local Authority-wide importance	EMP2.2: Rassau Industrial Estate EMP2.5: Tafarnaubach Industrial Estate
Secondary Employment Sites	Sites typically have a variety of employment uses and tend to draw individuals and investment from within the local authority area. There may be a small presence of national companies within these estates however established larger local businesses tend to predominate.	Sites of Local Authority-wide Importance	EMP2.1: Tredegar Business Park EMP2.3: Waun y Pound Industrial Estate EMP2.4: Festival Park EMP2.6: Crown Business Park EMP2.8: Blaenant Industrial Estate EMP2.11: Cwmtillery Industrial Estate EMP2.20: Glandwr Industrial Estate

Type	Typical Characteristics	Typical Importance	Employment Areas
Key Local Employment Sites	Sites of significance in the local context, offering important local employment opportunities. Sites are typified by a local SME/start-up presence and will usually have the space to allow such businesses to grow and expand in the short-medium term.	Sub-local Authority Employment Sites	EMP2.9: Barleyfield Industrial Estate EMP2.10: Rising Sun Industrial Estate EMP2.12: Roseheyworth Business Park EMP2.16: Bridge Street Industrial Estate (recommended) EMP2.17: Noble Square Industrial Estate EMP2.21: Llanhilleth Industrial Estate (recommended)
Neighbourhood Employment Sites	Such sites provide employment opportunities for members of the surrounding communities. These sites are typically small in scale and contain a small number of businesses. Such businesses tend to serve the immediate area and do not have a wide catchment. This definition extends to include small rural employment sites.		EMP2.7: Pond Road Workshops EMP2.13: Cwm Draw Industrial Estate EMP2.14: Marine Street Industrial Estate EMP2.15: Sirhowy Hill Industrial Estate EMP2.18: Blaina Enterprise Centre EMP2.19: Cwmcrachen Industrial Estate

Source: Blaenau Gwent CBC/BE Group 2019

8.31 It is assumed that future growth will be focused around the nine Employment Areas identified as being 'Major' or 'Secondary' Employment Sites. The Secondary Employment Sites also represent the County Borough's supply of B1/B2/B8 premises for meeting local needs. They should be protected for that use. No Employment Area is suffering major vacancy/dereliction, although in two cases Area boundaries could be redrawn to remove areas of land in non B-Class use or areas of vacant land where the prospect of redevelopment for employment uses appears modest:

- EMP2.19: Cwmcrachen Industrial Estate – Removing non relevant uses and ensuring boundaries better reflect the real area of land
- EMP2.13: Cwm Draw Industrial Estate – Would suggest the wider area boundary is too widely drawn, including a number of disused plots in the south with only limited linkages to the main employment area. Consider removing

them from the allocation and allowing some flexibility as to growth in this southern part while protecting a more tightly defined employment area in the north.

- 8.32 EMP2.15: Sirhowy Hill Industrial Estate is now so dominated by trade and non B-Class uses that protecting it solely as a B1/B2/B8 does not reflect real world conditions. A recommendation to deallocate the Area is thus made in Section 9.0.
- 8.33 Blaenau Gwent's identified Employment Areas contain some 640,177 sqm of occupied B1, B2, B8 floorspace, with another 45,258 sqm in 'other' employment uses, an overall floorspace total of 685,435 sqm. Within this 83,697 sqm is identified as vacant (although not necessarily being marketed). This gives the County Borough a reasonable overall occupancy rate of 87.8 percent.
- 8.34 Of the occupied premises B2 uses dominate, accounting for 78 percent of all stock, or 83.5 percent of all stock in B-Class uses. Only 5.4/5.8 percent of the stock is offices, focused at EMP2.9: Barleyfield Industrial Estate, EMP2.10: Rising Sun Industrial Estate and EMP2.4: Festival Park. B1 light industrial units only account for 3.3/3.5 percent of the stock, focused in EMP2.5: Tafarnaubach Industrial Estate and EMP2.9: Barleyfield Industrial Estate. 6.6/7.1 percent is in B8 use, focused at EMP2.5: Tafarnaubach Industrial Estate and EMP2.4: Festival Park.
- 8.35 Occupancy varies although even small, neighbourhood level employment areas are rarely more than a third vacant, and as noted previously, the property market assessments suggest shortfalls of all types of industrial/warehouse premises. Across the 21 areas some 14.72 ha of infill land, additional to the Allocated Employment Sites, is identified (although adjustments to area boundaries may alter this total). Although this does represent a pool of further development land, should it be needed, none of the identified infill plots appear superior in accessibility, physical quality, etc. to the existing employment site allocations.

Future Land Requirements

- 8.36 There is no definitive model for forecasting future employment land needs. Reflecting the Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan' two 'policy off' based models have been used to assess future employment land provision. These are the projection forward of historic land take and a forecast based on employment sector

change, a 'policy on' version of Practice Guidance Method 2 is also provided. This uses the latest estimate of policy on job creation provided by the Council – 3,375 extra jobs – considering population projections, the projected impacts of the Ebbw Vale Enterprise Zone (1,500 extra jobs), options to reduce out commuting, increase the economic activity rate and reduce the employment rate.

- 8.37 In terms of take-up, Blaenau Gwent Council has provided LDP monitoring data on past employment land completions between 2007 and 2018. More historic data, provided from past employment land studies is judged incompatible and, since it includes demolition of the main Ebbw Vale Steelworks site in 2002, with the loss of 39,000 sqm of floorspace, would unrealistically skew any result towards a negative need.
- 8.38 Projecting forward the 2007-2018 data identified the need for 28,468.5 sqm of additional floorspace over 2018-2033. In converting this to land, BE Group recommends that a 40 percent plot ratio is used as this better reflects development densities in Blaenau Gwent's Employment Areas, and likely future densities outside of the Town Centre.
- 8.39 Applying a 40 percent ratio, the following need is identified:
- B1 Offices: None
 - B1/B2 Industrial: 20,083.5 sqm needed at 40 percent plot coverage ($20,083.5 \text{ sqm} \div 4,000 \text{ sqm} = 5.02\text{ha}$)
 - B8 Warehousing: 8,385.0 sqm needed at 40 percent plot coverage ($8,385.0 \text{ sqm} \div 4,000 \text{ sqm} = 2.10 \text{ ha}$)
 - Total Need = **7.12 ha**
- 8.40 Incorporating a five-year take-up buffer to provide a choice and range of sites, a continuum of supply beyond 2033 period and, most importantly, to allow for possible B-Class employment land losses, increases the need to:
- B1/B2: $5.02 \text{ ha} + 1.67 \text{ ha} = 6.69 \text{ ha}$
 - B8: $2.10 + 0.75 \text{ ha} = 2.85 \text{ ha}$
 - Total: **9.54 ha**
- 8.41 In Section 6.0, BE Group identifies a realistic employment land supply of 45.81 ha. While this may be subject to variation, as plans evolve, it is easily large enough to meet identified quantitative needs.

8.42 The Policy Off employment-based forecast, whilst not ultimately recommended, suggests the following in terms of future employment land provision to 2033:

- B1 Offices – 62 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 0.25 ha
- B2/B8 Industrial – 947 less jobs at 67 sqm per worker and a 40 percent plot ratio = (15.86 ha)
- Total net need = **(15.61 ha)**.

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

8.44 However, the employment methods of forecasting make no allowance for real world market and occupier conditions. E.g. that land take-up/property needs can be for different reasons such as modernisation or geographic relocation or that expansion may also be within existing premises or on expansion land not accounted for in land allocations. Experience also suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate, and improved productivity could lead to additional need.

8.45 It is considered that the employment-based land requirements' calculations can represent a false position. To test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for the period 2007-2018 and compared to the actual land take-up during that period (see Table 27).

Table 27 – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 1,198 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
16 sqm per worker	19,168	4.79
<i>Take Up 2007-2018</i>		-
Industrial (B2/B8)	Based on 1,528 less workers, sqm	Plot Ratio at 40 percent Coverage, ha
67 sqm per worker	(102,376)	(25.59)
<i>Take Up 2007-2018</i>	<i>21,317 (including B1 industrial)</i>	5.33

Source: Blaenau Gwent CBC/BE Group, 2019

8.46 The trend shows that policy off jobs forecasting is not an accurate method of calculating land. Forecasting suggests that over 2007-2018 Blaenau Gwent should have gained 4.79 ha of B1 office land but lost 25 ha of B2/B8 land. In reality, modest growth of 5.33 ha was recorded, all for industrial and warehousing uses.

8.47 To account for local growth aspirations a 'policy on' employment-based forecast was completed. This assumes 3,375 extra jobs, all new to the County Borough, on top of baseline jobs forecasts and split 75:25 between manufacturing and office-based uses.

8.48 This Policy On employment-based forecast suggests the following in terms of future employment land provision to 2033:

- B1 Offices – 862 additional jobs at 16 sqm per worker and a 40 percent plot ratio = 3.45 ha
- B2/B8 Industrial – 1,628 additional jobs at 67 sqm per worker and a 40 percent plot ratio = 27.28 ha
- Total net need = **30.73 ha.**

8.49 3,375 jobs represent a sizable additional growth for Blaenau Gwent, when the Policy-Off model only suggests the County Borough will gain 186 jobs to 2033. It is unsurprising that Policy-On Modelling indicates a far larger requirement, 30.73 ha, particularly as the previous forecast of a loss of B2/B8 employment has been transformed into a net gain of 1,628 jobs. If a lower jobs growth figure of 1,500 is assumed, based solely on forecast growth from the Enterprise Zone, needs become 1.85 ha in net need, 3.05 ha from growth only need.

8.50 A summary of the various forecast scenarios is set out in Table 28. They relate to the period 2018-2033.

Table 28 – Land Forecast Models – Summary

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
Practice Guidance Method One: Past Building Completions	45.81	B1 Office: - B1/B2 Ind: 5.02 B8: 2.10 Total: 7.12	B1 Office: - B1/B2 Ind: 1.67 B8: 0.75 Total: 2.42	B1 Office: - B1/B2 Ind: 6.69 B8: 2.85 Total: 9.54	36.27	Based on historic (11 years) take-up of 1,937.9 sqm/year at a 40 percent plot ratio

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
Practice Guidance Method Two: Labour Demand Forecasting (Policy Off)	45.81	<i>Net Change</i> B1: 0.25 B2/B8: (15.86) Total: (15.61) <i>Growth Only</i> B1: 0.65 B2/B8: 0.39 Total: 1.04	<i>Net Change</i> B1: 0.08 B2/B8: - Total: 0.08 <i>Growth Only</i> B1: 0.22 B2/B8: 0.13 Total: 0.35	<i>Net Change</i> B1: 0.33 B2/B8: (15.86) Total: (15.53) <i>Growth Only</i> B1: 0.87 B2/B8: 0.52 Total: 1.39	<i>Net Change</i> 61.34 <i>Growth Only</i> 44.42	Policy Off Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors
Practice Guidance Method Two: Labour Demand Forecasting (Policy On)	45.81	<i>Net Change</i> B1: 3.45 B2/B8: 27.28 Total: 30.73 <i>Growth Only</i> B1: 3.85 B2/B8: 27.54 Total: 31.39	<i>Net Change</i> B1: 1.15 B2/B8: 9.09 Total: 10.24 <i>Growth Only</i> B1: 1.28 B2/B8: 9.18 Total: 10.46	<i>Net Change</i> B1: 4.60 B2/B8: 36.37 Total: 40.97 <i>Growth Only</i> B1: 5.13 B2/B8: 36.72 Total: 41.85	<i>Net Change</i> 4.84 <i>Growth Only</i> 3.96	Policy On – 3,375 additional jobs Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors <i>N.B. if a lower Policy-On jobs growth figure of 1,500 is assumed, solely from the Enterprise Zone, needs become 1.85 ha in net need, 3.05 ha from growth only need. This equates to:</i> <i>Net change: 43.96 ha</i> <i>Growth only: 42.76 ha</i>

Source: Blaenau Gwent CBC/BE Group, 2019

*Realistic land supply

8.51 The variation in the outcome figures demonstrates the uncertainty of forecasting. While all models show that Blaenau Gwent has a surplus of land, against quantitative needs, that oversupply ranges from 3.96 ha to 61.34 ha.

8.52 Based the market assessment and reviewing the historic trends in employment change and land take up, we would discount Practice Guidance Method Two: Labour

Demand Forecasting (Policy Off). Practice Guidance Method One: Past Building Completions projects forward Blaenau Gwent's recent take up, illustrating what land need would look like if local growth patterns continued unchanged to 2033. Thus, this represents the **minimum land requirement for Blaenau Gwent – 9.54 ha**

- 8.53 However, the County Borough is seeking to achieve economic growth above its norm. Although some of the criticisms of the Policy Off Method can also be applied to Practice Guidance Method Two: Labour Demand Forecasting (Policy On), this Model does provide an illustration of what land need might look like if the current economic growth aspirations were met in full and the County Borough gained 3,375 jobs to 2033. Thus, Labour Demand Forecasting (Policy On) identifies the **maximum (aspirational) land requirement for Blaenau Gwent – Up to 41.85 ha with a buffer for flexibility/land loss, etc.** Real world land take up will likely fall between these two targets.

Employment Land Supply

- 8.54 This Study has reviewed the allocated employment land in the County Borough, realistically available to meet B1/B2/B8 needs. The maximum possible supply from these 13 sites, is 50.0 ha. However, an assessment of site conditions and owner intentions, completed in Section 6.0, suggests a more realistic supply of 45.81 ha in 12 sites.
- 8.55 As noted above, with employment land needs ranging from 9.54 ha up to 41.85 ha, Blaenau Gwent has sufficient land to meet projected needs, even with all policy-on growth aspirations accounted for and a generous further buffer provided under the assumption of some future land losses to non B-Class uses. The issue is thus not Blaenau Gwent's land supply but rather the need to deliver meaningful property options on those sites, something discussed further in Section 9.0.
- 8.56 Of the realistic supply, although some sites will be easier to bring forward than others, none are identified as having any major site constraints which prevent delivery, with most having some developer/occupier interest associated with them, even if full development is not imminent. Thus, there is no strong reason why these allocations cannot be carried forward into the next LDP.
- 8.57 In terms of alternatives, if key sites within the realistic employment land supply do prove undeliverable, then the Council could look to its 21 Employment Areas to meet further needs. 14.72 ha of infill land, within defined B-Class employment areas, has

been identified by this Study and Council Monitoring. However, these infill plots are generally inferior to the existing Allocated Sites in terms of their size, flexibility, position and access to the strategic road network. They should not be prioritised over the Site Allocations unless there is a compelling reason to do so.

9.0 RECOMMENDATIONS

Introduction

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

Employment Land Need

Recommendation 1 – Future Employment Land Need

- 9.2 The identified realistic land supply of 45.81 ha, discussed below, will meet needs to 2033 under all the scenarios put forward in this study. This includes Practice Guidance Method One: Past Building Completions which uses take up rates of 1,937.9 sqm/year, at a 40 percent plot ratio, and identifies quantitative needs of 9.54 ha over 2018-2033, inclusive of a five-year flexibility buffer. Of this, at least 70 percent, 6.69 ha, should be for B1/B8 uses and the remainder, 2.85 ha, should be for B8 uses.
- 9.3 This is a forward projection of Blaenau Gwent's current rate of economic growth, i.e. what it has achieved and would continue to achieve if no further growth from the baseline occurred. Thus, Practice Guidance Method One: Past Building Completions is recommended as a measure of the minimum needs in the County Borough.
- 9.4 Of course, Blaenau Gwent aspires to achieve a rate of growth above the norm to improve the economic situation for its residents, businesses and investors. It has a Policy On target of 3,375 extra jobs for the County Borough, provided through a variety of means. Converted into a land target, 3,375 extra jobs give need, under Practice Guidance Method Two: Labour Demand Forecasting (Policy On) of up to 41.85 ha when considering only growth sectors and inclusive of a five-year flexibility buffer. This can be seen as the maximum land need requirement under a high growth, aspirational scenario in which all of Blaenau Gwent's growth policy priorities are achieved, in full, and still allowing for some losses of land and some retained supply in 2033, to meet needs as the next LDP is being developed.
- 9.5 If a lower jobs growth figure of 1,500 is assumed, just accounting for the projected jobs generation of the Enterprise Zone, needs become 1.85 ha in net need, 3.05 ha

from growth only need. While this gives an illustration of what needs would be like at this level of jobs growth, 3,375 jobs is the ultimate aspirational target and the resulting land needs are thus the main aspiration for physical growth.

9.6 The third scenario, Practice Guidance Method Two: Labour Demand Forecasting (Policy Off) is judged excessively pessimistic, requiring, at best, only 1.39 ha of land to 2033. This forecast has little relation to even Blaenau Gwent’s modest recent take up rate or the aspirations and needs for land and premises expressed by stakeholders. It generally suggests that Blaenau Gwent’s future economic performance will be worse than its current position, a view which is neither desirable nor backed up by the evidence of this Study.

9.7 It is recommended that Blaenau Gwent County Borough Council use the roll forward of historic take-up as the minimum land target and Labour Demand Forecasting (Policy On) as the maximum land target. In practice, this means that the Council should allocate a land supply of not less than 41-42 ha to meet emerging policy commitments and support the best level of jobs growth forecast. Even under the worst future economic conditions, however, the supply should not be allowed to drop below 9-10 ha to allow the County Borough to maintain its current rate of economic growth.

Table 29 – Land Forecast Models – Summary

Model	Land Stock 2019, ha*	Land Need 2018-2033, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus, ha	Assumptions
Practice Guidance Method One: Past Building Completions Minimum Land Target	45.81	B1 Office: - B1/B2 Ind: 5.02 B8: 2.10 Total: 7.12	B1 Office: - B1/B2 Ind: 1.67 B8: 0.75 Total: 2.42	B1 Office: - B1/B2 Ind: 6.69 B8: 2.85 Total: 9.54	36.27	Based on historic (11 years) take-up of 1,937.9 sqm/year at a 40 percent plot ratio
Practice Guidance Method Two: Labour Demand Forecasting (Policy Off)	45.81	<i>Net Change</i> B1: 0.25 B2/B8: (15.86) Total: (15.61) <i>Growth Only</i> B1: 0.65 B2/B8: 0.39 Total: 1.04	<i>Net Change</i> B1: 0.08 B2/B8: - Total: 0.08 <i>Growth Only</i> B1: 0.22 B2/B8: 0.13 Total: 0.35	<i>Net Change</i> B1: 0.33 B2/B8: (15.86) Total: (15.53) <i>Growth Only</i> B1: 0.87 B2/B8: 0.52 Total: 1.39	<i>Net Change</i> 61.34 <i>Growth Only</i> 44.42	Policy Off Based on <i>Net Change</i> : Projected employment change across sectors <i>Growth Only</i> : Projected growth sectors

totalling 50.0 ha, based on indicative developable areas, which are proposed for B-Class employment use. Analysis of this supply suggests that some 4.19 ha is proposed for other uses. The realistic land supply is judged to be 45.81 ha.

Recommendation 3 – Employment Areas to be Retained

9.10 The 21 allocated employment areas of the County Borough have been reviewed, with reference to the hierarchy of sites set out in LDP Policy EMP2 Employment Area Protection. Table 30 provides area specific recommendations. One point to note is that we would generally not recommend the Council allocate any of the existing Employment Areas for B1 Business Park uses only, although in the future The Works will likely merit this designation because of its micro business focus. The County Borough's Areas all appear to offer some mix of B1/B2/B8 options and demand is strongly for B2/B8 uses over B1 offices. Limiting locations ability to meet the full range of needs is, from a market perspective at least, not desirable although other planning factors may still encourage limitations on occupancy.

Table 30 – Existing Employment Area Recommendations

Policy ID.	Name	Size, ha	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.1	Tredegar Business Park	6.90	The site should be retained for employment purposes, reflecting the range of high value uses found here. Site is primarily in B1 use, but future growth on EMP1.2 Land at Tredegar Business Park, will likely extend across the B1/B2/B8 use classes, reflecting wider demand. (Yes) Consider allocation as a 'Primary Site' to allow a broader range of B-Class uses on the land, in line with market interest.
EMP2.2	Rassau Industrial Estate	113.00	The site should be retained for employment use. Location comprises a well-established strategic scale industrial estate, a key part of the County Borough's offer in the Heads of the Valleys economic corridor and a focus for inward investment. (Yes) Given the focus of this location for major business occupation and its position on the Heads of the Valleys Road, we would recommend this location be designated a 'Strategic Site' in the LDP hierarchy
EMP2.3	Waun y Pound Industrial Estate	20.90	The site should be retained for employment use. Well located, mostly local scale site which has seen recent development and is attracting market interest. Constraints may mean that further expansion here is a slow process. Smaller scale premises are increasingly dominated by B8 trade uses, which requires further monitoring. LDP policy could consider splitting the location into separate areas for trade and industrial/warehouse employment to protect the remaining industrial/storage uses as a Primary Site. (Yes – part at least) Protect as 'Primary Site' in the LDP hierarchy, in part at least.

Policy ID.	Name	Size, ha	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.4	Festival Park	21.12	<p>The majority of the site should be retained for employment use, as a high-quality local employment area including office and business centre options</p> <p>The boundary of the employment site could be amended to exclude the southern area of the site. The area is small and consists of only 5 employment units, a hotel and restaurant which are predominantly non B uses. This area of the site is located within a residential area and is divided from the rest of the industrial estate via the A4046. The larger offices should still be protected though, give the scarcity of such options locally.</p> <p>(Yes – part at least) Protect as 'Primary Site' in the LDP hierarchy, in part at least.</p>
EMP2.5	Tafarnaubach Industrial Estate	59.60	<p>The site should be retained for a primary employment site. Location also appears to be a good source of further employment land, should it be needed.</p> <p>(Yes) Protect as 'Primary Site' in the LDP hierarchy.</p>
EMP2.6	Crown Business Park	28.50	<p>The site should be retained for a primary employment site as a local, but still high value site in the Heads of the Valleys Economic Corridor.</p> <p>(Yes) Protect as 'Primary Site' in the LDP hierarchy.</p>
EMP2.7	Pond Road Workshops	1.40	<p>Low value site, but still serving some economic functions. Based on an occupancy rate of around 70 percent the area should be protected, but not to the exclusion of any alternative options which may generate superior economic or community value. If vacancy rates, site conditions decline further, any allocation would need to be reviewed.</p> <p>(Yes) Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy.</p>
EMP2.8	Blaenant Industrial Estate	9.10	<p>The site should be retained for employment use, reflecting the presence of several key local occupiers for the County Borough. Some Council owned development land is available here, should it be required.</p> <p>(Yes) Protect as 'Primary Site' in the LDP hierarchy.</p>
EMP2.9	Barleyfield Industrial Estate	7.80	<p>Consideration should be given to change the site to a secondary employment site which allows an acceptable commercial service as well as B1, B2, and B8. The subdivision of the units has allowed for the creation of very small units. However, such small, affordable units are needed to serve the local market and the high level of local start-ups. The modest vacancy rate suggests that the site is still serving a function and should be protected.</p> <p>(Yes) Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy</p>
EMP2.10	Rising Sun Industrial Estate	13.90	<p>The site should be retained for employment purposes, reflecting both its offer of micro business space and the presence of several large employers.</p> <p>(Yes) Protect as 'Primary Site' in the LDP hierarchy.</p>
EMP2.11	Cwmtillery Industrial Estate	7.20	<p>The site should be retained for a primary employment site, based on the range of occupiers and the reasonable quality of most units.</p> <p>(Yes) Protect as 'Primary Site' in the LDP hierarchy.</p>

Policy ID.	Name	Size, ha	Recommendations (Safeguarding Yes/No) Recommended Position in LDP Hierarchy
EMP2.12	Roseheyworth Business Park	8.50	The site should be retained for employment use, reflecting good occupancy rates and the general quality of the stock. (Yes) Protect as 'Primary Site' in the LDP hierarchy.
EMP2.13	Cwm Draw Industrial Estate	14.80	Main estate in the north is of reasonable quality, with a mix of occupiers. Would suggest the wider area boundary is too widely drawn, including several disused plots in the south with only limited linkages to the main employment area. Consider removing them from the allocation and allowing some flexibility as to growth in this southern part while protecting a more tightly defined employment area in the north. (Yes – part at least) Protect as 'Secondary Site' in the LDP hierarchy, in part at least.
EMP2.14	Marine Street Industrial Estate	1.30	The site should be retained for employment use. Site serves a function, with a 79 percent occupancy rate, but continued monitoring is required to identify further evidence of decline. In the long term, plans for refurbishment and/or redevelopment may need to be considered. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.15	Sirhowy Hill Industrial Estate	1.90	Area has value, but for a broader mix of employment generating uses beyond the B-Class. Due to the pressure for alternative uses, it may be more beneficial to not protect the industrial estate and allow the estate to be guided by the market. (No)
EMP2.16	Bridge Street Industrial Estate	0.90	The site should be protected for a Key Local Employment Site. Although quality is moderate, the estate is in full use and provides useful micro business space, particularly for car garages which may not be able to afford options elsewhere. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.17	Noble Square Industrial Estate	3.00	The site should be retained as a secondary employment site. Contains a small, but well-established group of SMEs. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.18	Blaina Enterprise Centre	-	Given the mix of uses on the estate, the site should be retained as a secondary employment site. Location continues to serve a purpose accommodating a diverse group of micro firms. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.
EMP2.19	Cwmcraehen Industrial Estate	6.10	The boundary of the site will need to be reconsidered in terms of the new gypsy traveller site. However, given the location only has one premises occupier, in non B-Class use, plus approx. three open storage uses/vehicle depots, two with narrow road access, the location is of limited economic value. Given area conditions and neighbouring uses it is unlikely to attract many further new businesses. It is recommended that the area is not allocated in the LDP as a B-Class employment area but left free to accommodate a broader range of uses which could generate economic and community value, appropriate to the location. (No)
EMP2.20	Glandwr Industrial Estate	6.90	The site should be retained for employment purposes, reflecting the recent investment here and the generally high quality of its offer of B2/B8 premises. Given the reasonable quality of much of the stock and strong A-Road location, it is recommended that it be considered a Primary rather than Secondary employment site. (Yes) Given site conditions, it is recommended that it be protected as a 'Primary Site' in the LDP hierarchy
EMP2.21	Llanhilleth Industrial Estate	0.74	The site should remain as a secondary employment site which allows an acceptable commercial service as well as B1, B2, B8 and SG uses. This reflects the reasonable quality of the location and the fact that it appears well used. (Yes) Protect as 'Secondary Site' in the LDP hierarchy.

Source: BE Group, 2019

Recommendation 4 – Existing Employment Area Protection

- 9.11 Some non B-Class uses are found on almost all the 21 Employment Areas of the County Borough, although with the exception of EMP2.15: Sirhowy Hill Industrial Estate, generally represent less than a third of the stock. Mostly this comprises the reuse of older industrial/storage units for a mix of trade, D2 and Sui Generis uses. The conversion of Town Centre office space for housing is a possibility, but as Blaenau Gwent has little in centre stock anyway, unlikely to be a major concern.
- 9.12 Blaenau Gwent already has a well-established LDP policy for protecting Employment Areas and allocated Employment Sites – Policy DM10: ‘Use Class Restrictions – Employment’ of the adopted LDP – which sets out the following: *“In accordance with Policies EMP1 and EMP2, development proposals on major industrial areas will be subject to the following restrictions:*
- *On sites allocated as Strategic Sites, development will only be permitted if it is:*
 - a. *Within use class B1 and B2.*
 - b. *To provide an ancillary facility or service to the proposed employment use.*
 - *On sites allocated or identified as Business Parks development will only be permitted if it is:*
 - a. *Within use class B1*
 - b. *To provide an ancillary facility or service to the proposed employment use.*
 - *On sites allocated or identified as Primary Sites, development will only be permitted if it is:*
 - a. *Within use classes B1, B2 and B8.*
 - b. *An appropriate Sui generis use*
 - c. *To provide an ancillary facility or service to the existing and proposed employment use.*
 - *On sites allocated or identified as Secondary Sites, development will only be permitted if it is:*
 - a. *Within use classes B1, B2 or B8.*
 - b. *An appropriate Sui generis use*

- c. *To provide an ancillary facility or service to the existing and proposed employment use.*
- d. *An acceptable commercial service.”*

9.13 Broadly we would agree with this protection policy and have accordingly set out or recommendations for where undeveloped sites and developed employment areas should fall in this hierarchy here in Section 9.0. We would make the following more general comments:

Strategic Sites/Business Parks/Primary Sites

- 9.14 Generally, we would recommend that the highest policy protections be given to the Strategic Sites – in the future MU1: Rhyd y Blew and, we would recommend, EMP2.2: Rassau Industrial Estate – along with the Business Parks which would be limited to The Works. Non - B Class uses should not normally be allowed in these locations although in practice, of course, The Works is already a mixed-use area.
- 9.15 Non - B Class uses may be more acceptable in Primary Sites if an applicant can demonstrate exceptional circumstances. Retail uses should not generally be supported on any Employment Areas but should be particularly avoided in larger industrial estates, where conflicts with industrial and logistics operations might result and trade could be drawn away from the County Borough’s existing retail centres.
- 9.16 Where non-B Class uses are proposed for, or within, Strategic-Primary Sites, contrary to LDP Policy, then the County Borough Council should require the applicants to demonstrate that:
- The site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and
 - The site/premises have been proactively marketed for employment purposes for a reasonable period (e.g. a minimum of twelve months) at a reasonable market rate (i.e. rent or capital value) as supported through a documented formal marketing strategy and campaign, or
 - There will be a significant community benefit which outweighs the impact of losing the employment site/premises.

Secondary Sites

9.17 For the eight Employment Areas we would recommend as Secondary Sites a more flexible approach could be taken to help facilitate a broad range of economic development, which is vital for the future sustainability and development of the local area's economy. In some cases, the size, location and characteristics of a site may mean that a development for non-B Class uses could provide greater benefit to the local community, in terms of addressing local needs, than if the site was retained solely in B1/B2/B8 employment use. Elsewhere, non-B Class uses such as gyms, training centres and nurseries/children's play facilities may occupy underused space, without fundamentally altering buildings to the point where they could never be brought back into B1/B2/B8 operation. Indeed, they can be key in the re-use of older low grade stock which might otherwise struggle to find occupiers, something evident on a number of Employment Areas in Blaenau Gwent. In terms of accommodating local B-Class businesses, and identified supply shortfalls, we would suggest the issue is less that some older stock is lost to other uses than new stock is not being developed or refurbished to meet needs.

9.18 The LDP policy allows for such uses to be considered on Secondary Sites and such applications within the County Borough should thus be treated on their individual merits, including employment outputs, but should be avoided on Strategic Employment sites.

Other Employment Locations

9.19 It is suggested that in terms of protecting employment properties that do not sit within Employment Areas, e.g. in the Town Centres, the redevelopment of employment land and premises for non B-Class employment uses be allowed in the following circumstances:

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

9.20 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed-use developments inappropriate on

particular employment areas. It is clearly for Blaenau Gwent County Borough Council to judge proposals on their merits taking account of these factors.

Recommendation 5 – Protecting Employment Sites

9.21 With quantitative land needs of up to 41.85 ha against a supply of 45.81 ha, there is enough land available to meet needs, although the resulting surplus is not large. To meet needs on a strongly pro-growth strategy, Blaenau Gwent requires effectively all the remaining allocated land it has. **Thus, it is not recommended that the Council release any of the EMP1 Allocations for other uses, unless viable and deliverable alternative sites are put forward.**

9.22 Table 31 provides recommendations on the 13 allocated employment sites in Blaenau Gwent.

Table 31 – Employment Land Recommendations

Policy ID.	Name	Realistic Land Supply, ha	Allocate in the new LDP?	Recommendations
EMP1.1	Land at Festival Park	0.70	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment use. Key infill plot in a high value local employment area, which is attracting market interest. Given the demand for this land, the Council should put in place a plan to allow for its disposal, as soon as possible.
EMP1.2	Land at Tredegar Business Park	2.10	Yes Consider allocation as a 'Primary Site' to allow a broader range of B-Class uses on the land, in line with market interest.	The site should be retained for employment purposes. Land represents a logical extension to an existing business park and location is attracting market interest. Also, land supply is more limited in Tredegar compared to Ebbw Vale. Given market interest, it is recommended that acceptable uses here be broadened to B1/B2/B8 and relevant Sui Generis. Larger size of site also means it is better able to support B2/B8 options than many other sites in the Tredegar area.
EMP1.3	Land at Rising Sun Industrial Estate	1.60	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment purposes. Although the adjacent school puts some limits on what can be delivered here, the land is still required by the market, representing a defined growth plot for Rising Sun Industrial Estate.
EMP1.4	Rassau Platform A	3.40	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route.
EMP1.5	Rassau Platform B	3.70	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route. Site would be accessed through neighbouring land - EMP1.4 Rassau Platform A. It is assumed both sites would be brought forward as a linked development scheme. The site boundary, in the existing LDP, incorporates a sizable area of woodland to the south (5 ha, approx.) included to secure S106 funding for woodland management/improvements as part of any development scheme. This approach should be reviewed in the replacement LDP.
EMP1.6	Land at Waun y	4.60	Maybe Protect as 'Primary Site' in the	The site should be retained for employment use. Expansion land to a small, but modern, local industrial estate,

Policy ID.	Name	Realistic Land Supply, ha	Allocate in the new LDP?	Recommendations
	Pound		LDP hierarchy, subject to clarification on site conditions.	accommodating major employers, which has seen some development. Site is attracting market interest, but stakeholders also suggest that historic uses on the site do impact on deliverability. This should be clarified before site is allocated again in the next LDP. Site boundary should be amended to remove developed land.
EMP1.7	Marine Colliery	0.00	Maybe Assumed not as likely development is rail freight use	Review future of site, reflecting the differing requirements noted above. If rail freight for quarry emerges as preferred option, then the location becomes a minerals and waste transport facility rather than land for B1/B2/B8 employment. This change of focus should be reflected in the emerging LDP and the land removed as an ordinary employment allocation.
EMP1.8	Crown Business Park Platform A	0.70	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment use. Site owner is considering B-Class uses to meet both its own needs, and the needs of others. Development of this site thus appears likely.
EMP1.9	Crown Business Park Platform B	1.60	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment purposes. Expansion land in a large local industrial estate, accommodating a number of major employers for the County Borough. The land has, and continues to, receive enquiries for several B-Class uses.
EMP1.10	Land at Roseheyworth Business Park	0.71	Yes - Part Protect as 'Primary Site' in the LDP hierarchy.	Protect the remaining land for B-Class uses. The Waste Facility significantly reduces the available B-Class development land, but a useful expansion site remains of 0.71 ha which allows some growth to Roseheyworth Business Park, now a local centre for high tech and high value businesses. Adjust site allocation boundary to allow for Waste Facility and to account for any land which is undevelopable due to flood risk.
MU1	Bryn Serth	10.00	Yes Protect as 'Primary Site' in the LDP hierarchy.	The site should be retained for employment. Although in the short term most development here is likely to be for non B-Class uses, the land represents a logical next phase of development for Rhyd y Blew to the north where development is likely in the short term. Completion of Rhyd y Blew would provide a critical mass of B-Class premises in the area and, assuming success here, encourage developers to look south for more development land to continue growth. Although this appears to have already been undertaken, supply figures will need to allow for any relevant land lost to B-class uses.
MU1	Rhyd y Blew	13.20	Yes Protect as 'Strategic Site' in the LDP hierarchy.	The site should be retained for employment purposes. The land has larger than local significance and is a key regeneration investment site for the County Borough. In seeking consent for B-Class uses, Welsh Government have made a commitment to development here and to consider speculative delivery.
MU2	'The Works' Business Hub	3.50	Yes Protect as 'Business Park' in the LDP hierarchy.	The site should be retained for employment use. Very high value infill plots in a key regeneration area. Plans for B-Class premises are being actively progressed on all the plots, with multiple planning consent's secured along with funding.

Source: BE Group, 2019

Recommendation 6 – Prioritise Delivery

9.23 Blaenau Gwent appears to have enough land to meet needs, but it is important to recognise that to actually support 3,375 additional jobs, will require not just available land but the delivery of 122,852 sqm of premises by 2033 (13,776 sqm of offices, 109,076 sqm of B2/B8 uses). Most businesses need completed property, not land, to

grow and invest and stakeholders strongly emphasise the shortages of appropriate quality premises in the County Borough.

9.24 While the realistic employment land supply is all considered developable, and is attracting market interest, translating that interest into development is still proving challenging in many locations outside sites being actively progressed by the public sector – Rhyd y Blew and the ‘The Works’ Business Hub.

9.25 To achieve policy goals, the Council, working with Welsh Government, needs to proactively encourage delivery across its whole site portfolio. Some broad recommendations to help achieve this include:

- Have a disposal strategy in place for relevant Council owned land and premises – There are a number of Council-owned plots in the portfolio and it is understood that the lack of a strategy to release vacant land (under what circumstances, by what mechanism, value aspirations, etc.) has inhibited possible deals in the past. Such a strategy is presently being developed by the Council.
- Work proactively with Welsh Government – Blaenau Gwent Council is working with Welsh Government on several local sites and the Council should actively consider ways to broaden this co-operation to other locations in the County Borough. This should be considered in light of the Welsh Government’s emerging Property Development Action Plan, which seeks to deliver 70,000 sqm of additional office and high-tech space in South East Wales, and the enhanced investment role Welsh Government is seeking in delivery
- Develop Delivery Strategies for Sites – While these don’t need to be large formalised plans, the Council should have clear ‘ways forward’ for delivery on the allocated land, particularly sites under public sector ownership, but informally at least, all the sites, working with other landowners, developers, etc. as required. One thing such strategies should clarify is the amount of support and investment the Council, and other public partners, are willing to put into bringing the site forward (at least for internal decision making). This should clarify not just the willingness/ability to provide direct financial investment but also officer time and other resources that can be put to the project.

9.26 This study has not been asked to provide such delivery strategies directly, however, some common delivery mechanisms, which have been successfully used by other public bodies in the past, and which involve varying levels of public intervention are set out in Table 32.

Table 32 – Delivery Mechanisms

Mechanism	Description
Private Sector Led/Private Sector Funded	Assumes a development is financially viable and has a willing developer. Public sector input will be limited to positive engagement by planning and economic development officers, to ensure a smooth delivery of the relevant property mix.
Revised Development Mix	Assumes a development viability gap, but no direct public sector intervention. Rather council officers and the developer negotiate a revised development mix which includes a stronger element of higher value uses to offset the gap. This does not automatically mean housing but could include retail or leisure uses, appropriate to the location, which can also improve values. Pubs/restaurants, a gym or hotel are examples of uses that both generate reasonable returns for developers and can improve the offer and attractiveness of a business park scheme.
Low Level Public Support	Public sector support does not always mean large scale investment. Sometimes a landowner may simply be unaware of the full potential of his site, level of market demand or how site constraints can be overcome. An increasingly common approach is for local authorities to assume some of the initial research costs, producing for example a planning brief or masterplan to show the owner/developer what is possible and prompt development. Support on site/area marketing may also be welcome.
Acquisition	Council buys the land to undertake direct development or in partnership.
Joint Venture Agreement	<p>A defined agreement between public sector agencies and private developer partners. It is most commonly used where land is, at least in part, owned by the public sector. The public sector can then support development by inputting the land at low or nil value or by seeking out infrastructure funding.</p> <p>Such a Joint Venture partnership can take a number of forms:</p> <ul style="list-style-type: none"> • Contractual Partnership – Normally a short term arrangement where the parties enter into a contractual arrangement where one party, usually the developer, will deliver. It would relate to the most straightforward developments. • Joint Venture through formation of a limited company formed through share issue - A common arrangement where each party will put in an element of cost and risk, and the return reflects the share. The council may put in land and/or capital, the developer will often meet development costs. The arrangement may see proceeds distributed in different ways. This could be a revenue share, or a share on sale of the investment. The party taking the greater level of risk will normally have first call on the profit. • Company limited by guarantee – Tends to be more for non-profit making arrangements and can introduce a number of partners to the company. This arrangement is more likely to be suitable for marketing and promotion of regeneration schemes rather than a Joint Venture to deliver development.
Direct Public	This may be in the form of direct development funding or funding infrastructure. In Wales this will likely include a Property Development

Mechanism	Description
Support	Grant programme from Welsh Government. It may also be through rental guarantees or other forms of security.
Annuity Rent	This is also increasingly used to support investments by pension funds and other major financial institutions into developments. The institution will fund the development in exchange for a lease of circa 35 years and an annuity rent paid by a secure covenant such as the council acting as developer. This would be a low but secured rent over the time period with agreed uplifts. The developer can then sub-let at market value to obtain a profitable rent. At the end of the 35 years the property will revert to the developer for £1 and the developer retains the long term asset value.
Revolving Infrastructure Fund	A method for paying for supporting infrastructure development on sites with otherwise good development potential. The public sector may use a range of funding such as prudential borrowing to provide funds in exchange for a long term payback of Business Rates, land receipts or associated income uplift. Where development is BREEAM Excellent, 100% of business rate levied can now be retained by the borrowing agency.

Source: BE Group, 2019

Other Recommendations

Recommendation 7 – Future Reviews

- 9.27 Paragraph 7.10 of the Welsh Government Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan, states that: *“Reviews of the whole evidence base, both larger than local and local studies, will most likely reflect the 4 year development plan cycle; however, an earlier review might be considered if certain employment land related targets are not being achieved and are identified through the LDP Annual Monitoring Report.”*
- 9.28 Locally, this report has shown how market conditions in Blaenau Gwent are evolving, with a shortage of industrial premises, local businesses seeking growth, ongoing inward investment, plans emerging for the Ebbw Vale Enterprise Zone and Welsh Government investment in several sites progressing. This is as well as ongoing uncertainty, at the UK level, over the delivery of Brexit and the resulting economic impacts. In view of these factors, the County Borough should continue to review its employment land portfolio as part of plan review stages or where there are significant local changes are identified as part of Plan monitoring.

Recommendation 8 – Maintain Awareness of External Influences

- 9.29 Welsh planning policy highlights the importance of joint working and ‘more than local’ planning, to understand the interconnectedness of local authority areas.

9.30 This Local Employment Land Review is produced alongside Regional Employment Study, which covers a Larger Than Local Area of Blaenau Gwent, Caerphilly, Monmouthshire, Newport and Torfaen. This related study provides a regional scale analysis the economic evidence base and the property and employment land market in the Larger Than Local Area. Its conclusions about the Larger Than Local property market and the interactions between Blaenau Gwent and its neighbours should be considered alongside this Study.

APPENDIX 1

LIST OF CONSULTEES

Appendix 1 – List of Consultees

Blaenau Gwent County Borough Council
Caerphilly County Borough Council
Continental Teves
Cooke and Arkwright
Cushman and Wakefield
David Spears Commercials
Fletcher Morgan
Freudenberg Performance Materials
Hutchings and Thomas
Industry Wales
Jenkins Best
Jones Lang LaSalle
Lambert Smith Hampton
Linnells
M4 Property Consultants
Monmouthshire County Council
Newport City Council
Pacific Hotel Partners
Radical Materials
Savills
Stuart Hogg Property Consultants
Sutton Consulting
Torfaen County Borough Council
Welsh Government (multiple departments)
Welsh Local Government Association

Appendix 1 – List of Consultees

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Savills
Stuart Hogg Property Consultants
Sutton Consulting
Torfaen County Borough Council
Welsh Government (multiple departments)
Welsh Local Government Association

APPENDIX 2

EMPLOYMENT SITE PROFORMAS FOR BLAENAU GWENT

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land at Festival Park
Site ID:	EMP1.1
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site is a flat vacant development platform centrally located within Festival Business Park, to the north of an Innovation Centre, which has very good links to the wider area and is located in close proximity to the Ebbw Vale rail link, the Works site and Ebbw Vale Town Centre. Access can be achieved via existing highway infrastructure provided within the business park.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	No known constraints
Describe Intended Development:	Business Park - B1 . Council owned land. The Council has received a range of enquiries for this land, from high value companies and a developer. The adjoining Innovation Centre operators have also expressed interest in the site, although only for overspill parking. However, the Council lacks a Disposal Strategy and has been so far unable to release this land for development.
Site Size (ha):	0.7
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: <u>1365</u>	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>1365</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:(Including information on local and strategic access, public transport, pedestrian/cycle access etc).	The distance of the site to the A465 (dual carriage way) is 4.6 miles and the M4 corridor is 20.3 miles. In terms of public transport, the site is located 0.4 miles from Ebbw Vale Town Railway Station and 5.3 miles from Llanhilleth Railway Station. The site is located approximately 643m from a bus stop.
Overall Accessibility Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: A flat grassed area of land with mature trees along east and western boundaries which should be retained. External Environment: Within the surrounding area there are no noise, smells, dirt or dust, the site is located within a pleasant environment. There are no significant pollutants produced by surrounding businesses.
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Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (Including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	The site is in a key location adjacent to the Works and in close proximity to the town centre. The site is allocated in the LDP for B1 Business Park employment use. The site is protected as part of a wider employment protection area - Primary Site EMP2.4. The site is also part of the Ebbw Vale Enterprise Zone. A planning enquiry for B1 or B2 use was considered with a caveat that B2 uses will be considered in exceptional circumstances. Overall, this is a highly accessible location, centrally located in the main growth area of Ebbw Vale. The site is attracting both developer and occupier interest. Although expansion of uses to the north and south of the site, onto this land, is one possibility, the land also provides the option of attracting new occupiers and development to the County Borough.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		4

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	No	

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	Unknown
If yes to the above, please elaborate:	

Further Comments

Any further comments?	Planning application requirements will include: A Pre-Application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Preliminary Risk Assessment, Coal Mining Risk Assessment and a Noise Assessment
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment use. Key infill plot in a high value local employment area, which is attracting market interest. Protect as 'Business Park' in the LDP hierarchy.	
Any other actions:	Given the demand for this land, the Council should put in place a plan to allow for its disposal, as soon as possible.	
Should the site be safeguarded or identified for employment uses?	Yes	

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land at Tredegar Business Park
Site ID:	EMP1.2
Location:	Tredegar

Photo:



Map:



Site Description:	The site is located at the southern end of Tredegar Business Park and benefits from a constructed access road as a result of the development of the first two phases of the business park. The site is a flat development platform with good access links to Tredegar town centre. To the north are existing industrial units, the Sirhowy river runs parallel to the eastern boundary. At the southern boundary the land abuts Bridge Street Industrial Estate and the eastern boundary runs parallel to Iron Row at a lower level. The site is also part of the Ebbw Vale Enterprise Zone.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	The site is located immediately adjacent to a SINCE - River Sirhowy ENV3.56
Constraints:	The site is located partly within a B flood zone and partly within a C2 flood zone in the south eastern corner.
Describe Intended Development:	Business Park - B1. Council owned site. Land links to the Innova One building to the north. This 2,788 sqm property is currently on the market. A historic D1 Training Centre, the building is on the market for office/warehousing uses. Land could form a southern expansion option for this property.
Site Size (ha):	2.1
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: 4095	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 4095	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on the local and strategic access, public transport, pedestrian / cycle access etc)	The distance of the site to the A465 (dual carriageway) is 3.0 miles and the M4 corridor is 21 miles. In terms of public transport, the site is located 4.6 miles from Ebbw Vale Railway Station and 9.6 miles from Llanhilleth Railway Station. The site is located approximately 450m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. Cycle racks are located outside the buildings. Large car parks are provided for each industrial unit.
Overall Accessibility Score:	4

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: The site is a flat area of land with significant vegetation cover in terms of grass shrubs and small trees. External Environment: The surrounding area is a clean and tidy site free from environmental problems. The site does not produce significant pollutants
Overall Internal Environment Score:	4
Overall External Environment Score	4

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	The land is located on a high profile, high quality industrial estate. This is a longstanding site which was allocated in the LDP for B1 Business Park employment use. The site is protected as part of a wider employment protection area - Business Park (EMP2.1). The site is also part of the Ebbw Vale Enterprise Zone. The land has attracted market interest for B1 uses and more significantly for B2 uses.
Does the site have a reasonable prospect of being developed/re-developed?	Yes
Is the market currently investing in the area?	Maybe
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	3

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None
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Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	No
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Alternative Uses

Is the site in demand or needed for alternative uses?	Yes	A D1 training facility has been allowed on site
Is there benefit in retaining the site for employment purposes?	Yes	

Viability

Are there considered to be any viability issues in bringing the site forward?	Unknown
If yes to the above, please elaborate:	

Further Comments

Any further comments?	A 7 metre buffer zone will be required along the river corridor. There is an opportunity to provide native hedgerow / scrub planting and a footpath to link to the adjacent Bridge Street Industrial Estate. Planning application requirements will include: A Pre-application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Preliminary Risk Assessment, Coal Mining Risk Assessment, Archaeological Desk-based Assessment and a Noise Assessment
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. Land represents a logical extension to an existing business park and location is attracting market interest. Also, land supply is more limited in Tredegar compared to Ebbw Vale.
Any other actions:	Given market interest, it is recommended that acceptable uses here be broadened to B1/B2/B8 and relevant Sui Generis. Larger size of site also means it is better able to support B2/B8 options than many other sites in the Tredegar area.
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land at Rising Sun Industrial Estate
Site ID:	EMP1.3
Location:	Blaina

Photo:



Map:



Site Description:	The site is reclaimed industrial land located to the north of Rising Sun Industrial Estate off the A465. To the east of the site are residential properties and to the north of the site is a new Welsh primary school. Access to the site is achievable through the new primary school site.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	There is a small drain located on site Current access shared with school. This adjacent use will provide some limits on what employment uses can be accommodated on this site.
Describe Intended Development:	Business Park - B1. Council is in negotiations with a potential large business occupier for this site. Further details remain confidential at this time.
Site Size (ha):	1.6
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: 3120	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 3120	Gross Loss: _____
B2 (sqm)	Gross Gain: _____	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access etc).	The distance of the site to the A465 (dual carriage way) is 8.18 miles and the M4 corridor is 18.3 miles. In terms of public transport, the site is located 7.1 miles from Ebbw Vale Railway Station and 6.1 miles from Llanhilleth Railway Station. The site is located approximately 565 m from a bus stop. Current access shared with school.
Overall Accessibility Score:	2

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: A relatively flat site with extensive vegetation cover in terms of grass, shrubs and some small trees. There is also a presence of watercourses on site which should be protected by a 5 metre buffer zone. External Environment: Within the surrounding area there are no noise, smells, dirt or dust, the site is located within a pleasant environment. There are no significant pollutants produced by surrounding businesses.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	The site is easily accessed from the A465 and is located near to local facilities within Blaina town centre. Although there is a high vacancy rate on Rising Sun Industrial Estate the site has recently seen some investment with the expansion of unit 21 (one of the larger units). The site is clean with no smells or pollution. The site is allocated in the LDP for B1 Business Park employment use. The site is protected as part of a wider employment protection area - Primary Site (EMP2.10). Evidence of market demand comes from the fact that a company is actively trying to relocate onto the land.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		4

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

Is the site in demand or needed for alternative uses?	No	There is 1 D1 use on site
Is there benefit in retaining the site for employment purposes?	Yes	

Viability

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

Further Comments

Any further comments?	The broadleaved woodland to the eastern, southern and western boundaries should be retained as a natural buffer between the development and residential properties. A buffer should also be created between the development and the school to the north. The Strategic Floods Consequence Assessment (2011) recommends that the conclusions made within stage 2 SFCA are addressed via a site specific FCA during the planning application stage. Planning application requirements will include: Pre-application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Flood Consequence Assessment, Preliminary Risk Assessment, Coal Mining Risk Assessment, Noise Assessment	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. Although the adjacent school puts some limits on what can be delivered here, the land is still required by the market, representing a defined growth plot for Rising Sun Industrial Estate.	
Any other actions:	Protect as 'Business Park' in the LDP hierarchy.	
Should the site be safeguarded or identified for employment uses?	Yes	

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Rassau Platform A
Site ID:	EMP1.4
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site is a vacant development platform located on the north eastern edge of the well established Rassau Industrial Estate, which is also part of the Ebbw Vale Enterprise Zone. The estate is located off the new Heads of the Valleys Road north of Ebbw Vale and benefits from existing highway infrastructure although access roads will need to be upgraded. Industrial area to the south is vacant.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	Trees on site
Describe Intended Development:	Primary Site - B1, B2, B8, appropriate SG. Welsh Government owned land, on the market with Jones Lang LaSalle (as is Platform B). Understood to be attracting good market interest.
Site Size (ha):	3.4
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: <u>2210</u>	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>2210</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>4420</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>4420</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access etc.)	The industrial estate is located directly off the A465 via the A4281. The distance of the site to the M4 corridor is 23.8 miles. In terms of public transport, the site is located 3.5 miles from Ebbw Vale Railway Station and 9.9 miles from Llanhilleth Railway Station. The site is located approximately 520m from a bus stop.
Overall Accessibility Score:	3

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: The site has strong ecological connectivity to adjacent woodland, Carno reservoir and surrounding countryside. External Environment: There is no noise, smells, dirt and dust within the vicinity of the site and the surrounding industrial estate does not produce any significant pollutants.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	The site is located off the Heads of the Valleys Road providing excellent links across the northern part of the borough which runs east to Cardiff and west towards Monmouth. The site is part of the Ebbw Vale Enterprise Zone. Good expansion land in the County Borough's key strategic industrial estate. Land is on the market and understood to be attracting interest.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

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

Viability

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

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route.
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Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Rassau Platform B
Site ID:	EMP1.5
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site lies along the eastern boundary of the well established Rassau Industrial Estate which is located off the Heads of the Valleys road north of Ebbw Vale and is part of the Ebbw Vale enterprise zone. Access to the site can be achieved through the employment allocation to the west of the site (EMP1.4 Rassau Platform A). Industrial area to the south west is vacant.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None known
Constraints:	Power lines cross the site to the south (currently shown in area boundary) Possible land contamination Woodland
Describe Intended Development:	Primary Site - B1, B2, B8, appropriate SG. Welsh Government owned land, on the market with Jones Lang LaSalle (as is Platform B). Understood to be attracting good market interest.
Site Size (ha):	3.7
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: 2405	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 2405	Gross Loss: _____
B2 (sqm)	Gross Gain: 4810	Gross Loss: _____
B8 (sqm)	Gross Gain: 4810	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access etc)	The industrial estate is located directly off the A465 via the A4281. The distance of the site to the M4 corridor is 23.8 miles. In terms of public transport, the site is located 3.5 miles from Ebbw Vale Railway Station and 9.9 miles from Llanhilleth Railway Station. The site is located approximately 520m from a bus stop. Access road in place to site. Site would be accessed through neighbouring land - EMP1.4 Rassau Platform A
Overall Accessibility Score:	3

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: The site has strong ecological connectivity to adjacent woodland, Carno reservoir and surrounding countryside. There is potential for contaminated land therefore a ground investigation and risk assessment is required. External Environment: There is no noise, smells, dirt and dust within the vicinity of the site and the surrounding industrial estate does not produce any significant pollutants.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities)	The site is located off the Heads of the Valleys Road providing excellent links across the northern part of the borough which runs east to Cardiff and west towards Monmouth. This is a longstanding site which was allocated in the UDP and is included in the LDP for employment use and is allocated as a primary site. The site is part of the Ebbw Vale Enterprise Zone. Good expansion land in the County Borough's key strategic industrial estate. Land is on the market and understood to be attracting interest.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	Overhead power lines cross the north east of the site	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	No	

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	Yes
If yes to the above, please elaborate:	Rerouting/relocating the electricity pylon would be a major and likely prohibitive development cost. It is assumed that development would be delivered around this obstacle.

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. Good quality expansion land in a key strategic employment area, attracting market interest. Platforms A and B also represent Blaenau Gwent's main offer of land on the cross Wales Heads of the Valley's route. Site would be accessed through neighbouring land - EMP1.4 Rassau Platform A. It is assumed both sites would be brought forward as a linked development scheme.	
Any other actions:	Current site boundary, in the existing LDP, appears to show the site covering a sizable area of woodland to the south (5 ha, approx.). This is assumed to be an error, that should be corrected. 'Primary Site' in the LDP hierarchy. Protect as	
Should the site be safeguarded or identified for employment uses?	Yes	

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land at Waun y Pound
Site ID:	EMP1.6
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site is located to the south-west of Waun y Pound Industrial Estate. To the north west is the existing industrial estate, the remainder of the site is surrounded by woodland. The development site is divided into 2 distinct areas, a northern platform and a southern platform. The southern platform is higher and accessed from the industrial access road to the west. It is a flat platform that is now grassed (contains rushes) over with a number of trees in the southern corner. There are prominent views into the site from the east. The northern platform is at a lower level and is accessed by the eastern access road. An access road into the site has already been provided.
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Site Overview

Site Status:	Part of the site has been developed. The remainder of the site is undeveloped allocated land
Designations:	None
Constraints:	Trees on site Historic mining and waste site
Describe Intended Development:	Primary site - B1, B2, B8, appropriate SG use. Was allocated for waste uses (Policy W1.1) in the existing LDP but is no longer required for this purpose. Site has seen strong market interest, but historic mining/waste uses, and adjacent lower quality uses are identified as barriers to securing a developer/occupier.
Site Size (ha):	4.6
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: <u>2990</u>	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>2990</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>5980</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>5980</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access)	The distance of the site to the A465 (dual carriage way) is 1.3 miles and the M4 corridor is 23.3 miles. In terms of public transport, the site is located 1.9 miles from Ebbw Vale Town Railway Station and 8.3 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Land to the west includes a common car park for the industrial estate.
Overall Accessibility Score:	3

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: Along the edge of the woodland boundary a native hedgerow is required with a minimum buffer of 5 metres. Any new development will require the provision of satisfactory alternative facilities for sewerage disposal. The Strategic Flood Consequence Assessment (2011) identifies that an FCA would be required and should include Waun-y-Pound reservoir and ditches, as well as potential for best practice in terms of surface water management. Unclear if any subsurface issue remain from historic mining uses. External Environment: Surrounding uses such as the recycling centre and the cement factory are in their nature dusty and dirty, however this has had no detrimental effect in terms of noise, smells, dirt and dust . The surrounding site does not produce any significant pollutants.	
Overall Internal Environment Score:	2	
Overall External Environment Score	3	

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	The site is located close to the Heads of the Valleys Road with good connections to Ebbw Vale town centre and other local facilities such as Morrisons. The site is also part of the Ebbw Vale Enterprise Zone. As noted, site is attracting market interest, but developers/occupiers remain wary of the site due to its historic uses, and possible impacts on deliverability.	
Does the site have a reasonable prospect of being developed/re-developed?	Maybe	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	2	

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	Unclear if historic uses (mining) have any impact on deliverability	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	Maybe	

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	Unknown
If yes to the above, please elaborate:	Unclear if historic uses (mining) have any impact on deliverability

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment use. Expansion land to a small, but modern, local industrial estate, accommodating major employers, which has seen some development. Site is attracting market interest, but stakeholders also suggest that historic uses on the site do impact on deliverability. This should be clarified before site is allocated again in the next LDP.
Any other actions:	Site boundary should be amended to remove developed land. Protect as 'Primary Site' in the LDP hierarchy, subject to the above.
Should the site be safeguarded or identified for employment uses?	Maybe

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Marine Colliery
Site ID:	EMP1.7
Location:	Ebbw Vale

Photo:



Map:



Site Description:	There is a large flat development platform south of Cwm on the former Marine Colliery site which is located off the A4046. An access road has already been provided to the site. To the north of the site is a Scheduled Ancient Monument - Marine Colliery Pumping Engine. The eastern boundary of the site borders the new rail connection and there is potential to develop rail sidings to enable sustainable transport of goods as reflected in the LDP (policy T2.5). The western boundary is bordered by the River Ebbw. This development platform sits at the bottom of a steeply sloping wooded valley.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	The site is designated as a SINC
Constraints:	The site is located in Flood Zone B
Describe Intended Development:	Primary Site - B1, B2, B8, appropriate SG use. Council owned land although Welsh Government has a Clawback on value generated from the site. Various proposals are being considered for this site, including industrial development, a cemetery and energy from waste facilities. Most likely, at the time of writing, would be a rail freight station (related to LDP Policy T2.5), serving a new sandstone quarry which would be developed on land east of the A4046, further up the valley. The Council is currently preparing reports and looking to make a decision as to a preferred way forward. It is understood the quarry is most favoured as it allows the extraction of specialist sandstone, not readily available elsewhere.
Site Size (ha):	3.4
Site Type:	Brownfield

Proposed Floorspace Change on Site

Assumed development for rail freight facility.

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

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian cycle/access etc).	The A4046 is a good quality road with good quality junctions. The distance of the site to the A465 (dual carriageway) is 11.7 miles and the M4 corridor is 22.9 miles. In terms of public transport, the site is located 1.7 miles from Parkway Railway Station Ebbw Vale and 3.0 miles from Llanhilleth Railway Station.
Overall Accessibility Score:	3

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Internal Environment: The land is flat with sparse vegetation and lies within a beautiful scenic setting with views down the lower Ebbw Fach valley. External Environment: There are no noise, smells, dirt/dust or general pollution within the surrounding area.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities)	An access road has already been provided to the site. The eastern boundary of the site borders the new rail connection and there is potential to develop rail sidings to enable sustainable transport of goods. The site is included in the LDP for employment as a primary site allocation. Site has attracted a number of requirements with, as noted, rail freight for a quarry being most likely at present. For other B-Class uses, the location appears relatively isolated, lacking linkages to other employment locations but could support a solus industrial operator seeking a large site with reasonable road (and potentially rail) access.
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Does the site have a reasonable prospect of being developed/re-developed?	Maybe
Is the market currently investing in the area?	No
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	3

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	None
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	Unknown
If yes to the above, please elaborate:	

Further Comments

Any further comments?	Planning application requirements will include: Pre-application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Flood Consequence Assessment, Preliminary Risk Assessment, Coal Mining Risk Assessment and a Noise Assessment
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Recommendations

Recommendations on the future of the site:	Review future of site, reflecting the differing requirements noted above. If rail freight for quarry emerges as preferred option then the location becomes a minerals and waste transport facility rather than land for B1/B2/B8 employment. This change of focus should be reflected in the emerging LDP and the land removed as an ordinary employment allocation.
Any other actions:	
Should the site be safeguarded or identified for employment uses?	Maybe

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Crown Business Park Platform A
Site ID:	EMP1.8
Location:	Tredegar

Photo:

Map:



Site Description:	This is a vacant site situated within the well-established Crown Business Park at the eastern corner adjacent to David Spears Car Sales. The site is located in close proximity to the new Heads of the Valleys Road where access can be achieved from the existing highway infrastructure serving the employment units. The site is a flat, grassed platform although the land slopes steeply to the east and south where there are ordinary watercourses present.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	Partly sloping Footpath/cycle route crosses the site Watercourses on the site
Describe Intended Development:	Primary site - B1, B2, B8, appropriate SG. The land was recently sold to an adjacent occupier who is considering the development of businesses units, both to meet its own expansion needs and to provide space for other occupiers.
Site Size (ha):	0.7
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: 455	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 455	Gross Loss: _____
B2 (sqm)	Gross Gain: 910	Gross Loss: _____
B8 (sqm)	Gross Gain: 910	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access etc)	The industrial estate is located directly off the Head of the Valleys Road, via the A4281. The distance of the site to the M4 corridor is 21.8 miles. In terms of public transport, the site is located 3.5 miles from Ebbw Vale Railway Station and 9.9 miles from Llanhilleth Railway Station. The site is located approximately 520m from a bus stop.	
Overall Accessibility Score:	4	

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc)	Internal Environment: The land is a flat platform covered with vegetation of scrub and grassland which rises steeply to the west. There are watercourses on site and extensive tree coverage to the east and western boundaries of the site. External Environment: The site and surrounding estate is a relatively clean and free from any significant problems such as noise and odour and does not produce any significant pollutants.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities)	The site is situated on a relatively high profile industrial estate with some large manufacturing companies. The industrial estate is located directly off the A465 providing a good connection across the northern part of the County Borough which runs east to Cardiff and west towards Monmouth. The site is allocated in the LDP for B1, B2 and B8 primary site employment use. The site is protected as part of a wider employment protection area - Primary Site EMP2.6. There has been past enquiries regarding the site for the development of a new unit for B2 use. Site now in new ownership and that owner is actively trying to deliver new business space, both for themselves and others.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	None	
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Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	No
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Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	Unknown
If yes to the above, please elaborate:	

Further Comments

Any further comments?	Watercourses should be protected from development from a 5 metre buffer zone. Along the western boundary of the site is a hedgerow which should be protected as part of any development proposal. Planning application requirements will include: A Pre-application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Preliminary Risk Assessment, Project Level Habitat Regulation Assessment, Coal Mining Risk Assessment, Noise Assessment.
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment use. Site owner is considering B-Class uses to meet both its own needs, and the needs of others. Development of this site thus appears likely.
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Crown Business Park Platform B
Site ID:	EMP1.9
Location:	Tredegar

Photo:



Map:



Site Description:	This is a vacant site situated within the well-established Crown Business Park which is located off the new Heads of the Valleys Road. Access can be achieved from the existing highway infrastructure serving the employment units. The site is a flat, grassed platform where there are ordinary watercourses present.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	Nant Melyn Brook crosses part of the site Footpaths cross the site
Describe Intended Development:	Primary site - B1, B2, B8, appropriate SG use. Council owned land. The Council has received recent requirements to build hybrid business units here.
Site Size (ha):	1.6
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: 1040	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 1040	Gross Loss: _____
B2 (sqm)	Gross Gain: 2080	Gross Loss: _____
B8 (sqm)	Gross Gain: 2080	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access)	The industrial estate is located directly off the Head of the Valleys Road, via the A4281. The distance of the site to the M4 corridor is 21.8 miles. In terms of public transport, the site is located 3.1 miles from Ebbw Vale Railway Station and 9.9 miles from Llanhilleth Railway Station. The site is located approximately 520m from a bus stop.
Overall Accessibility Score:	3

Environmental Factors

Description: (including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc)	Internal Environment: The site is a flat plateau, covered extensively with grass and scrub. The land is surrounded by mature trees and a steep embankment to the east. External Environment: The surrounding estate is relatively clean and free from any significant problems such as noise and odour and does not produce any significant pollutants.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description: (including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities)	The site is situated on a relatively high profile industrial estate with some large manufacturing companies which has very real prospects of being retained for employment purposes. The industrial estate is located directly off the A465 providing a good connection across the northern part of the borough which runs east to Cardiff and west towards Monmouth. The site is allocated in the LDP for B1, B2 and B8 primary site employment use. The site is protected as part of a wider employment protection area - Primary Site EMP2.6. There has been past enquiries regarding the site in terms of B2 industrial use, most recently for hybrid business units and for providing a gas fired standby power plant.
Does the site have a reasonable prospect of being developed/re-developed?	Yes

Is the market currently investing in the area?	Yes
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	3

Other Site Considerations

Adverse Impacts

Description: (including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment)	None	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous substances etc.)	No	

Alternative Uses

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

Viability

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

Further Comments

Any further comments?	A hedgerow runs along part of the western boundary which should be protected as part of any development proposal. Planning application requirements will include: A Pre-application Consultation Report, Design and Access Statement, Preliminary Ecology Appraisal, Preliminary Risk Assessment and a Coal Mining Risk Assessment.
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. Expansion land in a large local industrial estate, accommodating a number of major employers for the County Borough. The land has, and continues to, receive enquiries for several B-Class uses.
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Land at Roseheymworth Business Park
Site ID:	EMP1.10
Location:	Tredegarr



Site Description:	The site is located off the A467 and is a vacant rectangular area of land which lies on the edge of Roseheymworth Business Park and adjacent to Roseheymworth Primary School. Access to the site can be achieved through an extension of the existing access roadway serving Roseheymworth Business Park. A community footpath runs along the southern and eastern boundary of the site, which would have to be protected in the layout of any development. Trees line the western boundary of the site which screen the site from A467 road, this should be retained to act as a buffer to the road corridor. There is an area of tree coverage in the south western corner and the presence of watercourses along the western and eastern boundaries of the site which should be protected.
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Site Overview

Site Status:	Undeveloped LDP allocation
Designations:	None
Constraints:	The site is partially located within Flood Zone B on site on edge of site <div style="text-align: right; font-size: small;">Trees Watercourses Footpath on edge of site</div>
Describe Intended Development:	Primary Site - B1, B2, B8, appropriate SG use. Council owned. Consent has now been granted for a Household Waste Civic Amenity Site on 0.79 ha of land in the south of the site, with access from the existing estate road provided along the eastern boundary of the site (also taking in the land most at risk from flooding). Other land remains available for B-Class development, with no further development planned at this time.
Site Size (ha):	1.5 (0.71 with Waste Facility excluded)
Site Type:	Brownfield

Proposed Floorspace Change on Site

Floorspace provision at an average developer ratio of 3900sqm/hectare.

B1 Office (sqm)	Gross Gain: <u>461</u>	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>462</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>923</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>923</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: <u>200</u>	Gross Loss: _____

Market Potential

Accessibility

Description: (including information on local and strategic access, public transport, pedestrian/cycle access etc)	The site is located directly off the A467 providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The distance of the site to the A465 is 8.18 miles and the M4 corridor is 20.0 miles. In terms of public transport, the site is located 7.1 miles from Ebbw Vale Railway Station and 4.2 miles from Llanhilleth Railway Station. The site is located approximately 700m from a bus stop. The A467 is a bus route. Access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc.
Overall Accessibility Score:	4

Environmental Factors

Description: (including information on the internal and external environment of the site (e.g. noise, smell, dirt/dust, general pollution, topography etc)	Internal Environment: The site is flat open land with significant vegetation cover in terms of small trees and rushes. The site is a pleasant environment with fantastic views across to the valleys. External Environment No noise, smells, dirt and dust - a pleasant environment. Significant soft landscaping throughout the existing industrial site in the form of trees, hedgerows and grassed areas. Entrance to the industrial estate site from the A467 is well maintained with flower beds and shrubbery. There is also good signage at the industrial site entrance.
Overall Internal Environment Score:	4
Overall External Environment Score	4

Market Attractiveness

Description: (Including information on the feasibility of the site coming forward for employment uses, local market evidence, improvement prospects and special opportunities).	In recent years, Roseheyworth Business Park has developed a significant cluster of high tech uses including medi tech and media companies. The area thus represents a high value asset for Blaenau Gwent which should be protected, and where possible, allowed to grow. The provision of a Waste facility does reduce the attractiveness of this site to occupiers/developers however, some 0.71 ha does still remain available to allow modest growth of the Business Park, while still keeping appropriate separation between higher value uses and the waste centre.	
Does the site have a reasonable prospect of being developed/re-developed?	Maybe	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	The site is partially located in flood zone B. There are also watercourses present on site and a stream along the eastern boundary therefore the site is a wet site. The current LDP identifies that a flood consequence assessment is required as part of any future planning application. A community footpath runs along the eastern boundary of the site which would need to be retained. Due to the site's former industrial use, a ground investigation and risk assessment is required.	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/ structures/hazardous substances etc.)	Maybe	

Alternative Uses

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

Viability

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

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	Protect the remaining land for B-Class uses. The Waste Facility significantly reduces the available B-Class development land, but a useful expansion site remains of 0.71 ha which allows some growth to Roseheyworth Business Park, now a local centre for high tech and high value businesses.	
Any other actions:	Adjust site allocation boundary to allow for Waste Facility and to account for any land which is undevelopable due to flood risk. 'Primary Site' in the LDP hierarchy.	Protect as
Should the site be safeguarded or identified for employment uses?	Yes	

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	Bryn Serth
Site ID:	MU1
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site is located within one of the flagship regeneration sites, Ebbw Vale Northern Corridor. The site has good links to the A465 - Heads of the Valley Road and Ebbw Vale town centre via the A4047. The site is a flat area of land which can be accessed from Bryn Serth road. The northern boundary of the site lies adjacent to and provides links to Rhyd-y-Blew. To the east of the site is Waun-y-Pound Industrial Estate. Site is within the Ebbw Vale Enterprise Zone. The southern end of the site lies adjacent to SINC ENV3.22 - Waun-y-Pound which contains a series of ponds and the Aneurin Bevan Stones, beyond that is the existing residential community of Sirhowy. The eastern boundary of the site abuts a Green Wedge.
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Site Overview

Site Status:	Undeveloped LDP Allocation
Designations:	The site is designated as a Site of Importance for Nature Conservation, ENV3.2 - Bryn Serth
Constraints:	A number of public Rights of Way run through the site which provides pedestrian linkage to adjacent land at Rhyd-y-Blew and beyond to Rassau.
Describe Intended Development:	B1, B2, an ancillary facility or service. Newbridge Construction own. Plans include a hotel and pub/restaurant in the south east corner of the site, at the junction of Bryn Serth Road and A4047. It is understood Newbridge Construction have interest from a hotel and pub/restaurant operator for this land and are expected to seek planning on this as a first phase of development. This reflects the MU1 Policy allocation here (leisure) in the LDP. The central area of the site is retained for B1/B2/B8 employment, with the north west corner of the site also identified for Roadside Services in the LDP.
Site Size (ha):	10
Site Type:	Greenfield

Proposed Floorspace Change on Site

Floorspace provision at average developer ratio of 3,900 sqm/ha

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>9,750</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>29,250</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: <u>Also likely here</u>	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	The site is located off the A465 via a slip road on to Bryn Serth road. The distance of the site to the M4 corridor is 23.6 miles. In terms of public transport, the site is located 1.4 miles from Ebbw Vale Railway Station and 8.3 miles from Llanhilleth Railway Station. The site is located approximately 330m from a bus stop. Access to the site can be achieved on foot via pavements.
Overall Accessibility Score:	4

Environmental Factors

Description:	Bryn Serth is a SINC so any development must be sensitive to this designation. The development of Bryn Serth should also be considered within the wider environmental context by providing ecological linkages to Rhyd-y-Blew. The Strategic Flood Consequence Assessment (FCA - 2011 prepared for the LDP) identifies that an FCA would be required and should include an assessment or appreciation of the on-site ditches and ponds.
Overall Internal Environment Score:	3
Overall External Environment Score	3

Market Attractiveness

Description:	The site is located off the A465. The site is part of the Ebbw Vale Enterprise Zone and is part of the Ebbw Vale Sustainable Regeneration Framework Masterplan. Current market activity here is focusing on service uses as well as housing on land south east of the A4047. However, development of larger B2/B8 uses on Rhyd y Blew should prompt activity to the south and help provide a critical mass of employment uses in the MU1 area, which Bryn Serth can build upon.
Does the site have a reasonable prospect of being developed/re-developed?	Yes
Is the market currently investing in the area?	Yes
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	4

Other Site Considerations

Adverse Impacts

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

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	No, the council are currently working with the landowners to bring the site forward.
If yes to the above, please elaborate:	

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment. Although in the short term most development here is likely to be for non B-Class uses, the land represents a logical next phase of development for Rhyd y Blew to the north where development is likely in the short term. Completion of Rhyd y Blew would provide a critical mass of B-Class premises in the area and, assuming success here, encourage developers to look south for more development land to continue growth. Although this appears to have already been undertaken, supply figures will need to allow for any relevant land lost to B-class uses.
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

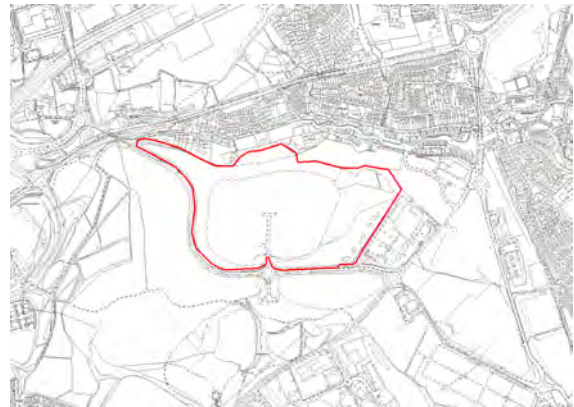
Site Details

Site Name:	Rhyd y Blew
Site ID:	MU1
Location:	Ebbw Vale

Photo:



Map:



	The site is located within one of the flagship regeneration sites, Ebbw Vale Northern Corridor. The site has good links to the A465 - Heads of the Valley Road and Ebbw Vale town centre. The site is a flat area of land which can be accessed from Bryn Serth road. To the north of the site lies the existing residential area of Rassau and beyond that Rassau Industrial Estate. To the east of the site is Morrisons store. The southern end of the site lies adjacent to and provides links to Bryn Serth. The A465 runs parallel to part of the western boundary providing access on to Bryn Serth road.
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Site Overview

Site Status:	Undeveloped LDP Allocation
Designations:	The site is designated as a Site of Importance for Nature Conservation, ENV3.27 - Rhyd-y-Blew
Constraints:	A public Right of Way runs along the eastern boundary of the site which provides pedestrian linkage through the site to the existing residential community of Rassau to the north. Gently sloping in places
Describe Intended Development:	Welsh Government owned. The site now has consent for a 4,955 sqm B1/B2/B8 industrial or warehouse unit on a site of 2.88 ha (which incorporates some expansion or further development land). It is assumed this will be developed speculatively as a first phase of development, to be followed by others subject to its success.
Site Size (ha):	13.2
Site Type:	Greenfield

Proposed Floorspace Change on Site

4,955 sqm now consented. At a standard developer ratio of 3,900 sqm/hectare, the site could provide a further 46,525 sqm of likely B2/B8 space

B1 Office (sqm)	Gross Gain: _____	Gross Loss: _____
B1 Other (sqm)	Gross Gain: <u>25,740</u>	Gross Loss: _____
B2 (sqm)	Gross Gain: <u>25,740</u>	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: _____	Gross Loss: _____

Market Potential

Accessibility

Description:	The site is located off the A465 via a slip road on to Bryn Serth road. The distance of the site to the M4 corridor is 23.6 miles. In terms of public transport, the site is located 1.4 miles from Ebbw Vale Railway Station and 8.3 miles from Llanhilleth Railway Station. The site is located approximately 330m from a bus stop. Access to the site can be achieved on foot via pavements.
Overall Accessibility Score:	4

Environmental Factors

Description:	Rhyd-y-Blew is a SINC so any development must be sensitive to this designation. The development of Rhyd-y-Blew should also be considered within the wider environmental context by providing ecological linkages to Bryn serth. The Strategic Flood Consequence Assessment (2011) identifies that an FCA would be required and should include an assessment or appreciation of the on-site ditches and ponds to ensure these are considered within the Masterplanning process.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description:	The site is located off the A465. The site is part of the Ebbw Vale Enterprise Zone and is part of the Ebbw Vale Sustainable Regeneration Framework Masterplan. The infrastructure works make the site ready and suitable for inward investment. Land is on the market with Knight Frank on behalf of owners Welsh Government. The consent for a large unit here and the willingness of site owners to consider a speculative development indicates the confidence in deliverability of this site and market demand.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		4

Other Site Considerations

Adverse Impacts

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

Alternative Uses

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

Viability

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

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment purposes. The land has larger than local significance, and is a key regeneration investment site for the County Borough. In seeking consent for B-Class uses, Welsh Government have made a commitment to development here and particularly to consider speculative delivery.
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.
Should the site be safeguarded or identified for employment uses?	Yes

South East Wales Regional Employment Land - Blaenau Gwent

Potential Development Sites - Qualitative Site Information

Site Details

Site Name:	'The Works' Business Hub
Site ID:	MU2
Location:	Ebbw Vale

Photo:



Map:



Site Description:	Land here comprises three development plots - BUS 2: Land at the Lime Avenue/Festival Drive Junction; BUS 1,3-5: Land north of the hospital; BUS 6: Land adjacent to the General Offices - which for part of the broader mixed-use 'The Works' site, sitting alongside the hospital, Gwent Coleg, leisure and other uses. The broader area comprises the former Ebbw Vale Steel Works and is now a key site within the Ebbw Vale Enterprise Zone and the Tech Valleys programme area. The Works is centrally located in Ebbw Vale, with direct access to Ebbw Vale Town Station. There are a range of services to the west, along the A4046.
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Site Overview

Site Status:	Undeveloped LDP Allocation
Designations:	None
Constraints:	Relevant plots are in Flood Zone C2
Describe Intended Development:	<p>Primarily B1 developments. Various proposals progressing via Welsh Government, Tech Valleys and Blaenau Gwent Enterprise Board:</p> <p>BUS 2: Lime Avenue Employment Park. 25 units, in six terraced blocks, ranging from 56-464 sqm. Planning consent is currently being sought for 1,692 sqm of B1 and 2,568 sqm of B2 floorspace. Funding needs to be secured.</p> <p>BUS 3-4: Lime Avenue Hybrid Business Units. Nine units ranging from 223-929 sqm, and totalling 2,350 sqm. Consented for planning with funding approved as a joint venture between the Council, Welsh Government and the Welsh European Funding Office. Welsh Government owned land. Tenders for development are currently being evaluated. Construction expected to commence in 2019, with completion by September 2020</p> <p>BUS 6: BOX Works, 21 micro business units of 15-20 sqm (929 sqm in total), consented for planning with most funding approved (small shortfall to resolve). Project led by Welsh Government on Government owned land. Construction expected in summer 2019.</p> <p style="text-align: right;">Land north of Coleg Gwent - provision of 856 sqm of offices (A2/B1)</p>
Site Size (ha):	3.5
Site Type:	Brownfield

Proposed Floorspace Change on Site

B1 Office (sqm)	Gross Gain: 1785	Gross Loss: _____
B1 Other (sqm)	Gross Gain: 1,692	Gross Loss: _____
B2 (sqm)	Gross Gain: 2,568	Gross Loss: _____
B8 (sqm)	Gross Gain: _____	Gross Loss: _____
Other Uses (sqm)	Gross Gain: 2,350 - B1 Hybrid	Gross Loss: _____

Market Potential

Accessibility

Description:	The distance of the site to the A465 (dual carriage way) is 3.2 miles and the M4 corridor is 20.4 miles. In terms of public transport, Ebbw Vale Town Railway Station sits adjacent to BUS 6 and is up to 0.7 miles from BUS 2. BUS2 is 0.7 miles from Ebbw Vale Parkway Station. There are bus stops along Lime Avenue, within 200 m of all the plots. Lime Avenue incorporates areas of cycle paths/shared surfaces.
Overall Accessibility Score:	4

Environmental Factors

Description:	Internal Environment: All plots area flat grassed areas of land. The exceptions are BUS 1 and 3 which still accommodate the exposed foundations of historic buildings. These will need to be addressed in construction. External Environment: Within the surrounding area there are no noise, smells, dirt or dust, the site is located within a pleasant environment comprising mostly good quality non B-Class uses such as a hospital and college. These will not generate significant pollutants.	
Overall Internal Environment Score:	4	
Overall External Environment Score	5	

Market Attractiveness

Description:	The Works is a focus for regeneration activity and investment in the County Borough and sits in close proximity to the town centre. It is part of the Ebbw Vale Enterprise Zone and Tech Valleys initiatives and public sector agencies are actively driving forward the development of new high value SME business space on all three plot areas. The result will be high value micro business space aimed at meeting identified needs in the County Borough for good quality start up and grow on space, reflecting the current lack of such good quality accommodation elsewhere in Blaenau Gwent.	
Does the site have a reasonable prospect of being developed/re-developed?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	Assumed that most legacies of the former Steelworks have already been addressed or can easily be accounted for.	
Any constraints associated with the site's previous use that would impact upon the site's redevelopment? (E.g. land contamination/structures/hazardous)	Maybe	

Alternative Uses

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

Viability

Are there considered to be any viability issues in bringing the site forward?	No
If yes to the above, please elaborate:	Public sector investment is addressing any value gaps

Further Comments

Any further comments?	
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Recommendations

Recommendations on the future of the site:	The site should be retained for employment use. Very high value infill plots in a key regeneration area. Plans for B-Class premises are being actively progressed on all the plots, with multiple planning consent's secured along with funding.	
Any other actions:	Protect as 'Business Park' in the LDP hierarchy.	
Should the site be safeguarded or identified for employment uses?	Yes	

APPENDIX 3

SEWSPG Regional Site Scoring Criteria

Site Scoring Criteria to Accompany Proformas

Ment Criteria	Issues to Consider	1 - Poor	5 - Excellent
Accessibility	Links to major roads (M4, A470, A465 etc); local and strategic access; public transport and pedestrian cycle access; internal circulation and parking.	Over five miles away from major motorway junctions or dual carriageways. Difficult, narrow access via residential streets/roads; sloping/bending access; congested roads and difficult site junctions. No pavements for pedestrians and lack of cycle lanes; inadequate crossing facilities. The site is remote with poor and infrequent transport links; 1 bus or train service per hour or less to a limited range of destinations. Lack of parking on site or nearby.	On major motorway junctions and/or dual carriageways. Easy access via good quality, uncongested roads with good quality junctions. Wide pavements and cycle lanes around the site which are safe and convenient. Close to railway stations and bus stops with frequent services running to a number of areas. Ample parking on site (where applicable).
Buildings and Site Quality and Characteristics	Condition and age of buildings, space around buildings and servicing.	Poor quality buildings which are unattractive and in a poor state of repair. Buildings have a detrimental impact upon the surrounding area. Absolutely no space around the buildings consequently there would be no scope for expansion. There is no provision on site for service vehicles and as such maneuverability would be an issue.	Very high quality, attractive buildings which are made from high quality materials and well maintained. The buildings make a positive contribution to the immediate and wider area. There are large quantities of space available around the buildings which will allow for expansion in all directions. There is ample provision for service vehicles on site affording generous space for maneuvering.

Site Scoring Criteria to Accompany Proformas

Ment Criteria	Issues to Consider	1 - Poor	5 - Excellent
Environmental Factors	Internal and external environment of the site (e.g. noise, smell, dirt/dust, general pollution etc).	Dirty site upon which activities are (or were) noisy and omit significant odors and dust/dirt. The site is (or was) polluting quite badly. The site impact (or previously impacted) upon adjoining occupiers; surrounding uses are highly sensitive/detrimentally impacted by activities on site. Poor quality external areas; poorly maintained with a poor design/layout.	Very clean and tidy site free from particular environmental problems (i.e. quiet, clean, odorless). The site does not (or did not) produce any significant pollutants. Surrounding uses are compatible with and not detrimentally affected by activities on site. Very high quality public areas/good quality design/landscaping and well maintained.
Market Attractiveness	Feasibility of site remaining for employment, local market evidence, improvement prospects, special opportunities and overall image of site.	Low profile, poor quality appearance, attracts lower end uses. High level of vacancy and difficult to let. Constraints on development and low levels of market activity. Unattractive poor quality image of the area. Would not have a realistic prospect of remaining for employment should the site become vacant or be required for an alternative use.	High profile, high quality appearance, low levels of vacancy (<10%). Units are rarely available and witness a quick turnover when vacated. The site witnesses new investment. Attractive and high quality area. Would have a very real prospect of being retained for employment purposes for the foreseeable future.

Site Scoring Criteria to Accompany Proformas

Ment Criteria	Issues to Consider	1 - Poor	5 - Excellent
Accessibility	Links to major roads (M4, A470, A465 etc); local and strategic access; public transport and pedestrian cycle access; internal circulation and parking.	Over five miles away from major motorway junctions or dual carriageways. Difficult, narrow access via residential streets/roads; sloping/bending access; congested roads and difficult site junctions. No pavements for pedestrians and lack of cycle lanes; inadequate crossing facilities. The site is remote with poor and infrequent transport links; 1 bus or train service per hour or less to a limited range of destinations. Lack of parking on site or nearby.	On major motorway junctions and/or dual carriageways. Easy access via good quality, uncongested roads with good quality junctions. Wide pavements and cycle lanes around the site which are safe and convenient. Close to railway stations and bus stops with frequent services running to a number of areas. Ample parking on site (where applicable).
Buildings and Site Quality and Characteristics	Condition and age of buildings, space around buildings and servicing.	Poor quality buildings which are unattractive and in a poor state of repair. Buildings have a detrimental impact upon the surrounding area. Absolutely no space around the buildings consequently there would be no scope for expansion. There is no provision on site for service vehicles and as such maneuverability would be an issue.	Very high quality, attractive buildings which are made from high quality materials and well maintained. The buildings make a positive contribution to the immediate and wider area. There are large quantities of space available around the buildings which will allow for expansion in all directions. There is ample provision for service vehicles on site affording generous space for manoeuvring.

Site Scoring Criteria to Accompany Proformas

Ment Criteria	Issues to Consider	1 - Poor	5 - Excellent
Environmental Factors	Internal and external environment of the site (e.g. noise, smell, dirt/dust, general pollution etc).	Dirty site upon which activities are (or were) noisy and omit significant odours and dust/dirt. The site is (or was) polluting quite badly. The site impact (or previously impacted) upon adjoining occupiers; surrounding uses are highly sensitive/detrimentally impacted by activities on site. Poor quality external areas; poorly maintained with a poor design/layout.	Very clean and tidy site free from particular environmental problems (i.e. quiet, clean, odourless). The site does not (or did not) produce any significant pollutants. Surrounding uses are compatible with and not detrimentally affected by activities on site. Very high quality public areas/good quality design/landscaping and well maintained.
Market Attractiveness	Feasibility of site remaining for employment, local market evidence, improvement prospects, special opportunities and overall image of site.	Low profile, poor quality appearance, attracts lower end uses. High level of vacancy and difficult to let. Constraints on development and low levels of market activity. Unattractive poor quality image of the area. Would not have a realistic prospect of remaining for employment should the site become vacant or be required for an alternative use.	High profile, high quality appearance, low levels of vacancy (<10%). Units are rarely available and witness a quick turnover when vacated. The site witnesses new investment. Attractive and high quality area. Would have a very real prospect of being retained for employment purposes for the foreseeable future.

APPENDIX 4

EMPLOYMENT AREAS PROFORMAS FOR BLAENAU GWENT

South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

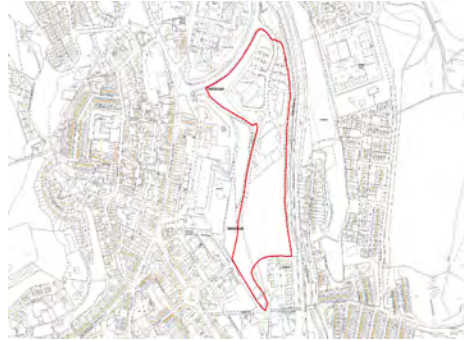
Site Details

Site Name:	Tredegar Business Park
Site ID:	EMP2.1
Location:	Tredegar

Photo:



Map:



Site Description:	Tredegar Business Park is located in the ward of Tredegar Central and West. To the north of the business park is a residential area known as St George's Court. Immediately to the east is the River Sirhowy and further east is a residential area. To the west is Tredegar town centre and to the south is Bridge Street industrial estate. There are currently only three units on site, one in the ownership of BGCBC and two privately owned. The latter includes Innova One, the 2,789 sqm former British Gas Training Academy in the south of the developed area, currently for sale at £1.4 million. Area supports several high tech businesses, and properties party/totally in D1 training uses, including the Valleys Information Technology and Communications Centre (ViTCC).
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Site Overview

Site Status:	Partly developed
Planning Status:	Business Park - B1. A vacant allocated employment site is located within this boundary. See Potential Development Sites - Qualitative Site Information Proforma - EMP1.2 Land at Tredegar Business Park.
Designations:	None
Constraints:	A small area of land along the south eastern boundary is located in flood zone C2 where the site runs parallel to Sirhowy River. A footpath crosses the site. The majority of the site lies within a Coalfield area of low risk and partly within a Coalfield area of high risk.
Site Size (ha):	6.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	1,443.43
B1 Other (sqm)	2,462.80
B2 (sqm)	0
B8 (sqm)	0
Other Uses (sqm)	0.00
Total Vacant Units (sqm)	2189
Site Vacancy Rate (%)	$1 / 4 \times 100 = 25\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

1 allocated site - see separate proforma

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <i>(Areas should be mapped. Replicate table as necessary).</i>	

Market Potential

Accessibility

Description:	Tredegar Business Park is located off the A4048 bypass providing a connection to the north to the A465 and south to the M4 corridor. Of the Borough. The distance of the site to the A465 (dual carriageway) is 1.5 miles and the M4 corridor is 23 miles. In terms of public transport, the site is located 4.2 miles from Ebbw Vale Railway Station and 9.6 miles from Llanhilleth Railway Station. The site is located approximately 450m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. Cycle racks are located outside the buildings. Large car parks are provided for each industrial unit.
Overall Accessibility Score:	4

Building and Site Quality and Characteristics

Description:	Very high, quality attractive buildings which are made from high quality materials and are well maintained. The buildings make a positive contribution to the immediate and wider area. There is space available around the buildings which will allow for expansion. There is ample provision for service vehicles on site affording generous space for manoeuvring.
Overall Building Quality Score:	4
Overall Site Quality Score:	4

Environmental Factors

Description:	Clean and tidy site free from environmental problems. The site does not produce significant pollutants. Surrounding uses are compatible with and not detrimentally affected by activities on site. Good quality public areas.	
Overall Internal Environment Score:	4	
Overall External Environment Score	4	

Market Attractiveness

Description:	High profile, high quality appearance, large modern units not found in many other local industrial estates in the County Borough. Historically low vacancy rate, despite the current large vacancy. Units are rarely available and witness a quick turnover when vacated. Would have a very real prospect of being retained for employment purposes for the foreseeable future. The area is also part of the Ebbw Vale Enterprise Zone.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	5	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

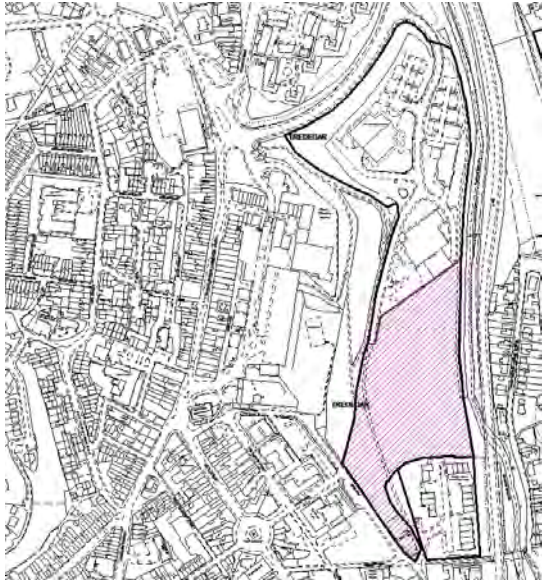
Site Notes

Site Notes and Further Comments:	Other uses: Innova One building is a former training facility (D1). However, unit is on the market as a modern office and warehouse building (hybrid) so ongoing use for D1 appears unlikely. VITCC building also appears to have a D1 element (training/conferences) in its operations.
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Recommendations

Future Recommendations:	The site should be retained for employment purposes, reflecting the range of high value uses found here. Site is primarily in B1 use at present, but future growth on EMP1.2 Land at Tredegar Business Park, will likely extend across the B1/B2/B8 use classes, reflecting wider demand.
Any other actions:	Consider allocation as a 'Primary Site' to allow a broader range of B-Class uses on the land, in line with market interest.
Classification: <u>(Annex D)</u>	Secondary Employ
Does the site require safeguarding?	Yes

Vacant Land



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Rassau Industrial Estate
Site ID:	EMP2.2
Location:	Ebbw Vale

Photo:



Map:



Site Description:	Rassau Industrial Estate is located within the Ebbw Fawr Valley within the ward of Rassau. The site is accessed directly from the A465 Heads of the Valleys road. The industrial estate abuts open countryside on the north, east and western edges. To the south. This strategic scale industrial estate, providing a diverse mix of privately-owned property in a range of sizes, but focused on larger B2/B8 units. Incorporates several major employers for the County Borough.
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Site Overview

Site Status:	Partly developed
Planning Status:	Primary Site - B1, B2 and B8. Two vacant allocated employment sites are located within this boundary. See Potential Development Sites - Qualitative Site Information Proforma - EMP1.4 Rassau Platform A and EMP1.5 Rassau Platform B.
Designations:	None
Constraints:	The majority of the site lies within a Coalfield area of high-risk. Part of this site is not located in a Coalfield area of low risk .
Site Size (ha):	113
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	3,266.88
B1 Other (sqm)	1,132.00
B2 (sqm)	356,088.40
B8 (sqm)	11,847.69
Other Uses (sqm)	2,748.57
Total Vacant Units (sqm)	31,725.53
Site Vacancy Rate (%)	10 / 48 X 100 = 20.83%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site **2 allocated sites - see separate proforma**

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	

Market Potential

Accessibility

Description:	The industrial estate is located directly off the A465 providing a good connection across the northern part of the borough which runs east to Cardiff and west towards Monmouth. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the M4 corridor is 25.5 miles. In terms of public transport, the site is located 2.7 miles from Ebbw Vale Town Railway Station and 3.5 miles from Parkway Railway Station Ebbw Vale. The site is located approximately 2,091m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front. There appears to be no issues with the amount of car parking spaces for each unit.
Overall Accessibility Score:	4

Building and Site Quality and Characteristics

Description:	Some of the units are relatively well maintained however, there are others that are in need of investment and redevelopment. There is space around some of the buildings which could allow for some expansion. There is an appropriate level of provision for service vehicles and manoeuvrability within the industrial estate.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	There can be some noise, dirt and dust due to the heavy industrial nature of the businesses present on the site. There can also be smells produced by Zorba Foods. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There is some soft landscaping throughout the industrial site in the form of trees, hedgerows and grassed areas.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description:	Rassau Industrial Estate is a high profile estate in a prominent area in terms of accessibility and its location along the A465. The site is also part of the Ebbw Vale Enterprise Zone. The vacancy rate is high at 21% which equates to 10 vacant units. There has been some investment in the site with the expansion of Jamestown and Zorba Food, the installation of a reserve power plant on land at the former Techboard site and the installation of Wind Turbines. Ongoing market interest in the location is reported, with strong prospects for further inward investment, which could include motor manufacturer TVR.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	5	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

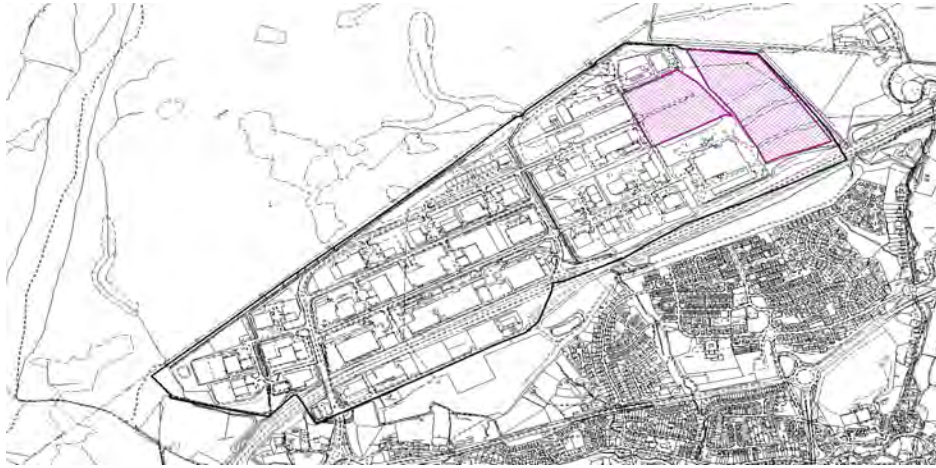
Site Notes

Site Notes and Further Comments:	Other uses on site: bathrooms and tile trade centre (A1), climbing centre (D2) and the storage and generation of energy (SG)
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Recommendations

Future Recommendations:	The site should be retained for employment use. Location comprises a well established strategic scale industrial estate, a key part of the County Borough's offer in the Heads of the Valleys economic corridor and a focus for inward investment.
Any other actions:	Given the focus of this location for major business occupation and its position on the Heads of the Valleys Road, we would recommend this location be designated a 'Strategic Site' in the LDP hierarchy
Classification: <u>Annex D</u>	Major Employment Site
Does the site require safeguarding?	Yes

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Waun y Pound Industrial Estate
Site ID:	EMP2.3
Location:	Ebbw Vale

Photo:



Map:



Site Description:	<p>Waun-y-Pound Industrial Estate lies within the Ebbw Fawr Valley within the ward of Ebbw Vale North and is located off the A4047. The north of the site abuts the boundary of MU1 Ebbw Vale Northern Corridor which is a mixed-use allocation. To the north of the site lies an out-of-town retail area and the Heads of the Valleys road. To the east, the site lies adjacent to a Site of Importance for Nature Conservation ENV3.41 - Sirhowy Hill Woodlands and Cardiff Pond. The residential area of Sirhowy is located south of the site and to the west are Anuerin Bevan Memorial Stone and a Site of Importance for Nature Conservation ENV 3.22 - Waun-y-pound. The majority of the units are privately owned, 2 units are in council ownership. It incorporates one major employer to the west, Continental Teves, plus a group of smaller mixed industrial, storage and trade uses in the east.</p>
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Site Overview

Site Status:	Partly developed
Planning Status:	Primary Site - B1, B2 and B8. The industrial estate as a whole is protected for employment. A vacant allocated employment site is located within this boundary, see Potential Development Sites - Qualitative Site Information Proforma - EMP1.6 Land at Waun-y-Pound.
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	20.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	0
B1 Other (sqm)	1,503
B2 (sqm)	21196.25
B8 (sqm)	5,325.54
Other Uses (sqm)	5814.74
Total Vacant Units (sqm)	0
Site Vacancy Rate (%)	0

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

4 (1 is an allocated site - see separate proforma)

Parcel 1 Site Size (ha):	0.33 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	Vacant area of land located adjacent to Hanson. Full application - approved on this site for a warehouse store (C/2018/0187). Land presently used for open storage, but no permanent structures on the site.
Parcel 2 Site Size (ha):	0.72 ha
Suitable for Redevelopment?	Potentially
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	Vacant undeveloped land situated on a corner location towards the southern end of the site, adjacent to a car park. The land is covered with vegetation and quite a few trees. The land is council owned.
Parcel 3 Site Size (ha):	0.61 ha
Suitable for Redevelopment?	Potentially
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	Vacant undeveloped land located to the east of the site. The land lies between existing businesses U-Hire and Travis Perkins.

Market Potential

Accessibility

Description:	The industrial estate is located directly off the A4047 (single carriageway) providing a good connection to the north of the Borough to the A465. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 1.3 miles and the M4 corridor is 23.3 miles. In terms of public transport, the site is located 1.9 miles from Ebbw Vale Town Railway Station and 8.3 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description:	The majority of the buildings are of good quality with some new units on site. Areas throughout the site are landscaped with grass and trees. Part of the site is used for the storage of shipping containers which has had a negative visual effect on the appearance of the industrial estate.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	There is a community recycling centre, which also produces gritting salt and a cement production unit, however this has had no detrimental effect in terms of noise, smells, dirt and dust. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There is soft landscaping throughout the industrial site in the form of trees and grassed areas.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description:	There are currently no vacant units on site. There has been investment within the site in recent years with the construction of new units. The area is also part of the Ebbw Vale Enterprise Zone. The overall image of the site is poor in places with some areas used for the storage of shipping containers which has had a negative visual effect on parts of the site. Development land here has seen strong market interest, but historic mining/waste uses, and adjacent lower quality uses are identified as barriers to securing a developer/occupier.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

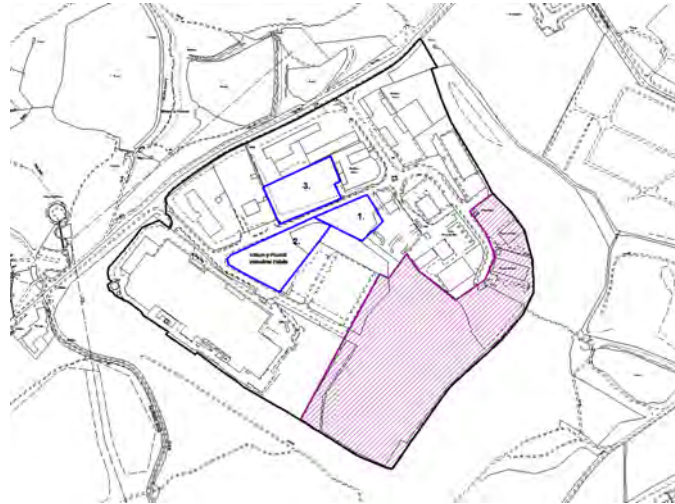
Site Notes

Site Notes and Further Comments:	Other uses on site include; 2x STOR, 2 x builders suppliers, plant hire and storage container hire (6 x SG).
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Recommendations

Future Recommendations:	The site should be retained for employment use. Well located, mostly local scale site which has seen recent development and is attracting market interest. Constraints may mean that further expansion here is a slow process. Smaller scale premises are increasingly dominated by B8 trade uses, which requires further monitoring. LDP policy could consider splitting the location into separate areas for trade and industrial/warehouse employment to protect the remaining industrial/storage uses as a Primary Site.	
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy, in part at least.	
Classification: <u>(Annex D)</u>	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Festival Park
Site ID:	EMP2.4
Location:	Ebbw Vale

Photo:



Map:



Site Description:	The site is located within the Ebbw Fawr Valley and partly in the wards of Ebbw Vale South and Cwm. The site can be accessed directly off the A4046. To the north is The Works and Ebbw Vale Town Centre. The eastern boundary runs parallel to the railway line which runs from Ebbw Vale Town Centre Station to the Parkway Station located south of the site. To the east is the residential area of Garden City. The southern boundary abuts a residential area and also lies in close proximity to the Garden Festival site and the Garden Festival Retail Park. The majority of the units are privately owned, there are 4 units to the south of the site which are in council ownership. Festival Park industrial estate is split into two areas by the A4046. The larger units are located to the north which also includes a number of very small units located within the Innovation Centre. To the south are a number of Council owned office units, a hotel and restaurant.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8. The industrial estate as a whole is protected for employment. A vacant allocated employment site is located within this boundary, see Potential Development Sites - Qualitative Site Information Proforma - EMP1.1 Land at Festival Park
Designations:	None
Constraints:	The site lies partially within flood zone C2. The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	21.12
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	5,162.71
B1 Other (sqm)	401.41
B2 (sqm)	7,650.53
B8 (sqm)	6,628.18
Other Uses (sqm)	1,441.48
Total Vacant Units (sqm)	303.14
Site Vacancy Rate (%)	$2 / 35 \times 100 = 5.71\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site **2 (1 is an allocated site - see separate proforma)**

Parcel 1 Site Size (ha):	1.34 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	This site is on the northern edge of the festival site and just south of the works site. The site is surrounded by roads, to the west is the main A4046 to Ebbw Vale/Newport, to the north and east is the main industrial access road and to the south is the access road roundabout for the site. The site slopes upwards to the north and east and it is overgrown grassland with the land to the west forming a steeply sloping embankment to the main road.

Market Potential

Accessibility

Description:	The industrial estate is located directly off the A4046 and is located in close proximity to The Works site and Ebbw Vale Town Centre. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 4.6 miles and the M4 corridor is 20.3 miles. In terms of public transport, the site is located 0.4 miles from Ebbw Vale Town Railway Station and 5.3 miles from Llanhilleth Railway Station. The site is located approximately 643m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces. There is signage throughout the site.
Overall Accessibility Score:	4

Building and Site Quality and Characteristics

Description:	The overall image of the site is good. The buildings are of good quality with space available around the larger units which could allow for expansion. There are a mix of unit sizes ranging from very small units within the Innovation centre to large private units such as Cwmtillery Glass and DHL. There is an appropriate level of provision for service vehicles and manoeuvrability within the industrial estate.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	No noise, smells, dirt or dust - a pleasant environment. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There is soft landscaping throughout the industrial site in the form of trees and grassed areas.	
Overall Internal Environment Score:	4	
Overall External Environment Score	4	

Market Attractiveness

Description:	The site has a low vacancy rate (equating to two units). The site is in a key location adjacent to the Works and in close proximity to the town centre, it is also located well in terms of public transport. There has been some investment in the area with the proposed extension of Cwmtillery Glass. The area is also part of the Ebbw Vale Enterprise Zone. Overall, this is a highly accessible location, centrally located in the main growth area of Ebbw Vale. Development land in the areas is attracting both developer and occupier interest. Location is also a key source of larger, self-contained offices, not readily found elsewhere in the County Borough.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a pub/restaurant(A3), hotel(C1), personal gym instructor (D2) and a dog grooming salon (SG).
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Recommendations

Future Recommendations:	The majority of the site should be retained for employment use, as a high quality local employment area including office and business centre options	
Any other actions:	The boundary of the employment site could be amended to exclude the southern area of the site. The area is small and consists of only 5 employment units, a hotel and restaurant which are predominantly non B uses. This area of the site is located within a residential area and is divided from the rest of the industrial estate via the A4046. The larger offices should still be protected though, give the scarcity of such options locally. Protect as 'Primary Site' in the LDP hierarchy, in part at least	
Classification: <u>(Annex D)</u>	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Tafarnaubach Industrial Estate
Site ID:	EMP2.5
Location:	Tredeggar

Photo:



Map:



Site Description:	Tafarnaubach Industrial Estate is located in the Sirhowy ward, Tredeggar. The estate is located in the north of the Borough off the Heads of the Valleys road (A465). To the north of the estate is open countryside. To the east of the estate is the residential area of Nantybwhch. To the south is the A465 road and Parc Bryn Bach. To the west of the estate is the residential area of Princetown. Units on the estate are privately owned, comprising a diverse group of mostly larger, older B2/B8 properties.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8.
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	59.6
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	2,349.16
B1 Other (sqm)	5,633.54
B2 (sqm)	65,728.96
B8 (sqm)	11,138.55
Other Uses (sqm)	14,180.99
Total Vacant Units (sqm)	21,764.86
Site Vacancy Rate (%)	$7 / 26 \times 100 = 26.92\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

4

Parcel 1 Site Size (ha):	0.8 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	This site is a flat parcel of land which is covered in vegetation. The site is located east of the estate, adjacent to existing employment unit; Acorn Windows. The site was previously allocated for employment in the Unitary Development Plan (A34). Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history.

Parcel 2 Site Size (ha):	1 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	The site is a relatively flat parcel of land which slopes slightly to the south and is covered in vegetation. The site is in the private ownership of NMC. The site is located adjacent to NMC's existing industrial units to the east of the estate. The site was previously allocated for employment in the Unitary Development Plan (A33). Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history.

Parcel 3 Site Size (ha):	0.6 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	The site is a flat parcel of land covered in vegetation. The site is in the private ownership of Hansteen and is located adjacent to industrial unit 27 ATAL, north of the estate. Farmland abuts the rear northern boundary. The site was previously allocated for employment in the Unitary Development Plan (A32). Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history.

Parcel 4 Site Size (ha):	0.7 ha
Suitable for Redevelopment?	Yes
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	The site is a flat area of land covered in vegetation. The site lies adjacent to industrial unit 30; Waldrons Commercials, and is located at the north western edge of the estate. Access to the site can be achieved via existing highway infrastructure. There are no known constraints and no planning history.

Market Potential**Accessibility**

Description:	Access to the industrial estate cannot be achieved via the A465 which runs parallel to the southern border. The site can be accessed from the south via Merthyr Road, which runs through a residential area and past Bryn Bach Primary School. Access can also be obtained from the south west via the residential area of Princetown. The distance of the site to the A465 (dual carriageway) is 1.4 miles and the M4 corridor is 24 miles. In terms of public transport, the site is located 4.6 miles from Ebbw Vale Railway Station and 11.1 miles from Llanhilleth Railway Station. The site is located approximately 125m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description:	The buildings are typical heavy industrial units, with some of the units in a poor state of repair and in need of maintenance and investment. The buildings do not have a significant adverse impact on the surrounding area. There is space around the majority of the buildings for potential future expansion. Although some units have expanded to their capacity such as Penn Pharmaceuticals. There is ample provision for service vehicles on site affording generous space for manoeuvring. There has been some investment in the site with the installation of Wind Turbines.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	The site is a typically heavy industrial estate with characteristics of dirt and dust by the nature of the businesses on the estate. The site is odourless however. The site does not produce any significant pollutants. Surrounding uses are not adversely affected by the activities on site due to appropriate buffers and screening.
Overall Internal Environment Score:	3
Overall External Environment Score:	3

Market Attractiveness

Description:	The vacancy rate is high at 27% which equates to 7 units, the majority of which are large units. A well established industrial estate, offering mostly larger, low density units on a prominent position on the A465 Heads of Valleys. Overall the estate remains well used and vacant units do let relatively quickly, plus the area has plenty of expansion land for infill growth. There has been some investment in the site over 2017-19	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

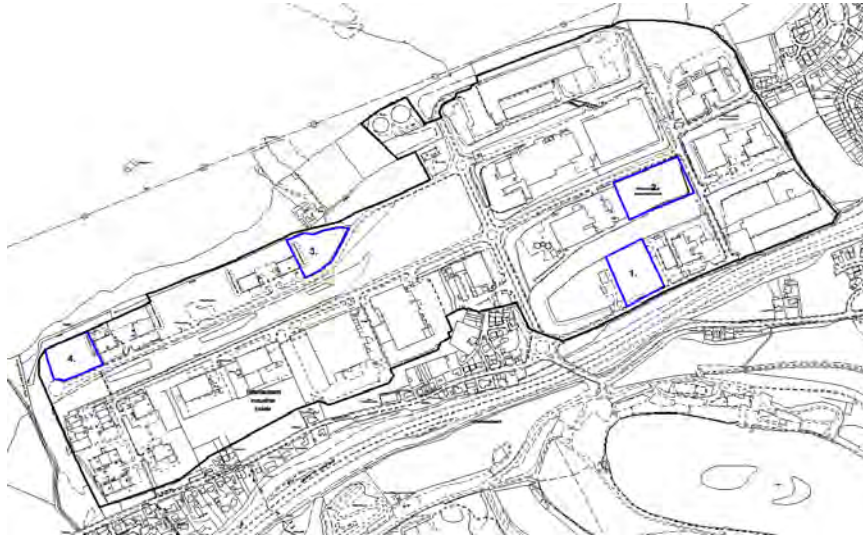
Site Notes

Site Notes and Further Comments:	Ron Skinner operate from two units providing a car showroom and a car repair/valeting service which are appropriate SG uses. There is also a D1 use providing a small training unit.
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Recommendations

Future Recommendations:	The site should be retained for a primary employment site. Location also appears to be a good source of further employment land, should it be needed.	
Any other actions:		
Classification: <u>(Annex D)</u>	Major Employment Site	
Does the site require safeguarding?	Yes	

Vacant land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Crown Business Park
Site ID:	EMP2.6
Location:	Tredegar

Photo:



Map:



Site Description:	Crown Business Park is located in the Sirhowy Valley and within the ward of Sirhowy. To the north of Crown Business Park is the A465 which also provides access to the site and beyond that open countryside. To the east is open land and the two strategic employment sites - Rhyd y Blew and Bryn Serth. To the south and west are residential areas. The estate has a mix of council owned and privately owned units, comprising mostly larger B2/B8 units, including several larger employers for the County Borough.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8. Two vacant allocated employment sites are located within this boundary. See Potential Development Sites - Qualitative Site Information Proforma - EMP1.8 Crown Business Park Platform A and EMP1.9 Crown Business Park Platform B.
Designations:	None
Constraints:	The site is partly located in flood zone C2 - the flood zone runs centrally through the industrial estate. A footpath also runs centrally through the site (ROW). The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	28.5
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	2,938.11
B1 Other (sqm)	579.97
B2 (sqm)	31,056.70
B8 (sqm)	2,425.17
Other Uses (sqm)	2,190.75
Total Vacant Units (sqm)	15,715.07
Site Vacancy Rate (%)	11 / 45 X 100 = 24.44%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

3 (2 are allocated sites - see separate proforma)

Parcel 1 Site Size (ha):	1.4 ha
Suitable for Redevelopment?	Potentially
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	The site is located in flood zone C2. The site is greenfield land of high ecological value according to the candidate site assessment for the LDP. Apart from the top plateau the site has steep embankments leading down to Nant Melyn Brook and stream corridor. The road serving Crown Business Park is capable of accommodating the development. It is in common ownership with the unit to the north, occupied by Metro Rod, and could be used for expansion.

Market Potential

Accessibility	
Description:	The industrial estate is located directly off the A465 via the A4281. The distance of the site to the M4 corridor is 23.8 miles. In terms of public transport, the site is located 3.5 miles from Ebbw Vale Railway Station and 9.9 miles from Llanhilleth Railway Station. The site is located approximately 520m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description:	There is a mix of quality of buildings, some which are of high quality, attractive and are well maintained such as G Tem. Whilst there are a few buildings which are of poorer quality and require maintenance and investment, these would include council owned units alongside others. There is some space around some of the buildings which will allow for expansion to some of the buildings. There is provision for service vehicles allowing space for manoeuvring.	
Overall Building Quality Score:	3	
Overall Site Quality Score:	3	

Environmental Factors

Description:	The site is a relatively clean site free from any significant problems such as noise and odour. The site does not produce any significant pollutants. Surrounding uses are compatible with and not detrimentally affected by activities on site. There are no public areas.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description:	The vacancy rate is relatively high due to the sub division of units on the Old Crown Cork site which as of yet have not all been let. The figures indicate that 9 of these vacant units are the Old Crown Cork site therefore there are only 2 vacant units on the remainder of the industrial estate. The industrial estate is a relatively high profile industrial estate, off the A465, home to some large manufacturing companies, such as Sogefi Filtration. There is a very real prospect of this industrial estate being retained for employment purposes. There has been some investment in the site with the installation of Wind Turbines.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

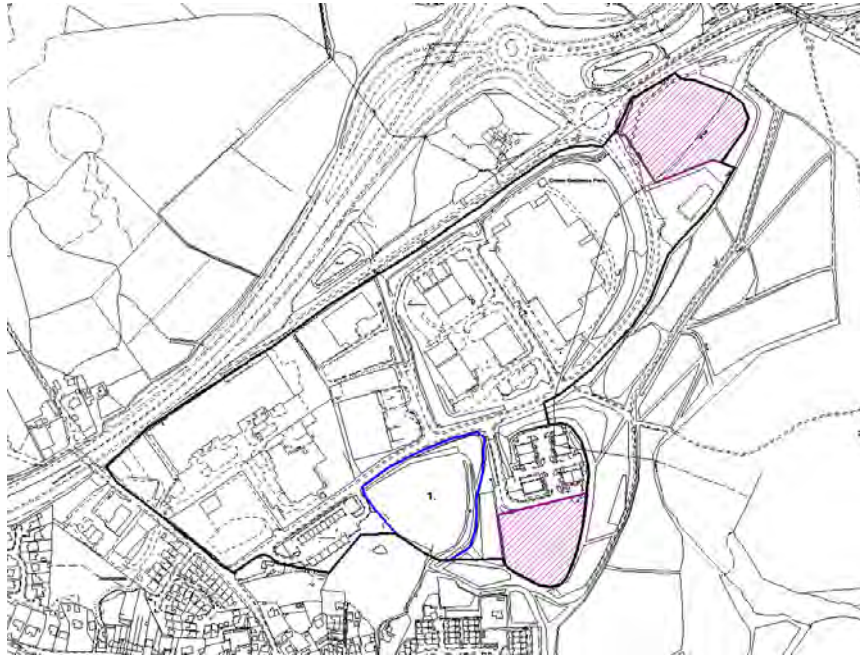
Site Notes

Site Notes and Further Comments:	Other uses on site include; a garden centre (A1), a motorbike training facility and childrens day care centre 2 x D1) and car sales, vehicle repair garage and repair and maintenance of specialised equipment (3 x SG)
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Recommendations

Future Recommendations:	The site should be retained for a primary employment site as a local, but still high value site in the Heads of the Valleys Economic Corridor	
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Pond Road Workshops
Site ID:	EMP2.7
Location:	Nantyglo

Photo:



Map:



Site Description:	The site is located in the Upper Ebbw Fach valley in the Nantyglo ward. To the north of the site is the Semtex Pond and further north is Lakeside Retail Park which comprises of Asda, Pets at Home, Home Bargains, Marstons Pub, Peacocks, Halfords and the Card Factory. To the east is the A467 and beyond is a residential area. To the west and south is the former Nantyglo school site and rugby ground. The site is accessed off Pond Road. Units on site are council owned and comprise a small dense scheme of terraced units, primarily serving the local market.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8.
Designations:	None
Constraints:	There is a very small area along the northern boundary of the site within flood zone C2. The site is wholly located within a Coalfield area of low risk.
Site Size (ha):	1.4
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	164.45
B1 Other (sqm)	667.5
B2 (sqm)	223.61
B8 (sqm)	102.87
Other Uses (sqm)	499.72
Total Vacant Units (sqm)	749.98
Site Vacancy Rate (%)	9 / 30 x 100 = 30%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located off Pond Road which is directly accessed off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 0.9 miles and the M4 corridor is 21.9 miles. In terms of public transport, the site is located 3.3 miles from Ebbw Vale Town Railway Station and 7.7 miles from Llanhilleth Railway Station. The site is located approximately 310m from a bus stop. The A467 is a bus route. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The buildings are of relatively modern design and are better quality. The buildings make a positive contribution to the immediate and wider area.
Overall Building Quality Score:	4
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	No noise, smells, dirt and dust - a pleasant environment. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There are no public areas within the industrial estate. There is no space around the buildings for expansion.	
Overall Internal Environment Score:	4	
Overall External Environment Score	3	

Market Attractiveness

Description:(Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The vacancy rate is high at 30%. This is in part due to a number of the units being constrained and the fact that the units are small and can only be accessed off an internal corridor, making them more of a room rather than an industrial unit. Overall quality of the premises is low, with a lot of units serving unmarked storage functions and no significant employers in evidence.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	2	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a cafe (A3), holistic therapist (D1), a day care service and laundrette and ironing centre (2 x SG)
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Recommendations

Future Recommendations:	Low value site, but still serving some economic functions. Based on an occupancy rate of around 70 percent the area should be protected, but not to the exclusion of any alternative options which may generate superior economic or community value. If vacancy rates, site conditions decline further, any allocation would need to be reviewed.	
Any other actions:	Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	Maybe	

South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Blaenant Industrial Estate
Site ID:	EMP2.8
Location:	Brynmawr

Photo:



Map:



Site Description:	Blaenant Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo and is accessed off Blaenavon Road. The site has a mix of unit sizes which are mostly privately owned with a small number in the ownership of the Council. The northern end of the site abuts Old Blaenavon road and lies in close proximity to Noble Square Industrial Estate and Brynmawr recreation ground. To the east, the site abuts open countryside which is designated as a Special Landscape Area - ENV2.2 Eastern Ridge & Mynydd James. The western boundary lies in close proximity to the new Primary Resource Centre. The southern border of the site abuts Cwmcraehen Industrial Estate and Barleyfield Industrial Estate. The site lies in close proximity to Brynmawr town centre and the Heads of the Valleys Road. The estate has a mix of council owned and privately-owned units, comprising a mix of small terraced units and larger self-contained B2/B8 options.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8.
Designations:	None
Constraints:	The majority of the site lies within a Coalfield area of high risk and partly within a Coalfield area of low risk .
Site Size (ha):	9.1
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	147.7
B1 Other (sqm)	198.23
B2 (sqm)	8,874.16
B8 (sqm)	665.98
Other Uses (sqm)	815.53
Total Vacant Units (sqm)	231.56
Site Vacancy Rate (%)	3 / 23x100 = 13.04%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

1

Parcel 1 Site Size (ha):	1.6 ha
Suitable for Redevelopment?	Potentially
Description of Parcel (Areas should be mapped. Replicate table as necessary):	A relatively flat parcel of land which is located north east of the industrial estate. The site is dense with shrubbery and a large amount of tree coverage. Though none of the trees are protected, they do form a buffer along the northern and eastern edges of the site. There is no planning history for this site. The bulk of the land is owned by the Council, with a parcel in the west part of a common holding with the Avon TSA facility to the west.

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located off Blaenavon Road via good quality roads with good quality junctions and can also be accessed through Barleyfield Industrial Estate. The distance of the site to the A465 (dual carriageway) is 0.6 miles and the M4 corridor is 18.9 miles via the A4043. In terms of public transport, the site is located 3.4 miles from Ebbw Vale Railway Station and 8.1 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. There appears that there is no provision of cycle racks etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	4

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	There is a mix of large private units on-site and a number of smaller units which are council owned. Most of the units are in moderately good condition with space around some of the buildings which will allow for expansion. There are a small number of units that require maintenance and investment. There are soft landscaped areas throughout the industrial site in the form of trees, hedgerows and grassed areas. The site does not produce any significant pollutants.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	The majority of the site is of heavy industrial units with some characteristics of dust and dirt by the nature of the business. The units are relatively clean and tidy and in a good state of repair. The site does not produce any significant pollutants and therefore the surrounding uses are not detrimentally affected by activities on the site.	
Overall Internal Environment Score:	3	
Overall External Environment Score	4	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The industrial estate has a vacancy rate of 13%. The site tends to have a low turn-over of new businesses and has a number of larger manufacturing companies that have been well established on site for some years. The site has good connections to the Heads of the Valleys Road (A465). There is a very real prospect of this industrial estate being retained for employment purposes.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site: cafe (A3) and a builder merchant and taxi service (2 x SG). Most of the buildings are of brick and/or metal corrugated sheeting with metal roofing. The age of the buildings are roughly late 70's into the 1980's.
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Recommendations

Future Recommendations:	The site should be retained for employment use, reflecting the presence of a number of key local occupiers for the County Borough. Some Council owned development land is available here, should it be required.	
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Barleyfield Industrial Estate
Site ID:	EMP2.9
Location:	Brynmaur

Photo:



Map:



Site Description:	Barleyfield Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. To the north the site abuts Blaenant Industrial Estate. To the east the site abuts Cwmcrachen Industrial Estate. The southern boundary lies in close proximity to the residential area of Nantyglo and to the west the site lies in close proximity to the new Primary Resource Centre and Blaen-y-Cwm Primary School. The industrial estate lies in close proximity to Brynmaur town centre and within a mile of the Heads of the Valleys road. The majority of the estate comprises of privately owned units with a small number of units which are council owned. The bulk of the premises comprises six large older warehouse units which have been subdivided. Other land includes several open storage plots.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8.
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	7.8
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	7,865.07
B1 Other (sqm)	2,564.97
B2 (sqm)	3,363.57
B8 (sqm)	1,882.47
Other Uses (sqm)	3,460.40
Total Vacant Units (sqm)	3,134.51
Site Vacancy Rate (%)	12 / 63 x 100 = 19.0%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site **0**

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The site has good links to the Heads of the Valleys Road and amenities within close proximity. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 1 mile and the M4 corridor is 18.9 miles via the A4043. In terms of public transport, the site is located 3.4 miles from Ebbw Vale Town Railway Station and 8.1 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The site is clean with no significant pollutants. There is very little to no soft landscaped areas. There is a mix of unit sizes most of which are privately owned with a very small number of units in the ownership of BGCBC. Over the years parts of the site in private ownership has seen investment with units being updated and maintained to a fair/good standard, there are still some units in need of maintenance and investment.
Overall Building Quality Score:	2
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	There is no smell, or dirt/dust. Parts of the estate look messy and unkept. There is limited soft landscaping within the industrial estate which is unkept.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The industrial estate is located in close proximity to Brynmawr town centre and has good links to the Heads of the Valleys Road which is a short distance away and to the south of the Borough via the A467. The site has a vacancy rate of 19%. However the number of businesses on site has expanded due to the sub-division of a large unit previously owned by the Council. The overall stock is aging, however, and could benefit from investment to secure its long term future.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; furniture sales (A1), forklift truck training facility (D1), 2 x fitness gyms (D2), a dog grooming parlour, 2 x car sales, tyre fitting garage and hair and beauty supplies (5 x SG).
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Recommendations

Future Recommendations:	Consideration should be given to change the site to a secondary employment site which allows an acceptable commercial service as well as B1, B2, and B8. The sub-division of the units has allowed for the creation of very small units. However, such small, affordable units are needed to serve the local market and the high level of local start-ups. The modest vacancy rate suggests that the site is still serving a function and should be protected.	
Any other actions:	Given site conditions, it is recommended that it be protected as a 'Secondary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Key Local Employment Sites	
Does the site require safeguarding?	Yes	

Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Rising Sun Industrial Estate
Site ID:	EMP2.10
Location:	Blaina

Photo:



Map:



Site Description:	The industrial estate is located in the Upper Ebbw Fach Valley partly in the ward of Nantyglo (northern section) and partly Blaina (southern section). The industrial estate is located to the south of Ysgol Gymraeg Bro Helyg. To the east of the estate are residential areas and the west is the A467 and open countryside. The industrial estate can be accessed directly off the A467. Units on the site are privately owned, comprising several larger facilities in the north, including large offices for Tai Calon Community Housing, and multiple small terraced schemes in the south
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8. The industrial estate as a whole is protected for employment. A vacant allocated employment site is located within this boundary, see Potential Development Sites - Qualitative Site Information Proforma - EMP1.3 Land at Rising Sun Industrial Estate.
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	13.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	6,738.32
B1 Other (sqm)	0
B2 (sqm)	13,559.38
B8 (sqm)	539.8
Other Uses (sqm)	357.88
Total Vacant Units (sqm)	236.97
Site Vacancy Rate (%)	$1/13 \times 100 = 7.69\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

1 (allocated site - see separate proforma)

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located directly off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 8.18 miles and the M4 corridor is 20.0 miles. In terms of public transport, the site is located 7.1 miles from Ebbw Vale Railway Station and 6.1 miles from Llanhilleth Railway Station. The site is located approximately 565 m from a bus stop. The A467 is a bus route. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The larger buildings such as Tai Calon are good quality buildings whilst the smaller units require some investment, particularly the buildings to the south east (units 1-7 and 10-18). There is some space around the larger buildings which could allow for expansion. There is an appropriate level of provision for service vehicles and manoeuvrability within the industrial estate.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	No noise, smells, dirt and dust - a pleasant environment. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There are no public areas within the industrial estate, however there are a number of areas with trees and soft landscaping which helps to improve the area.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The site has a low vacancy rate at 8% (1 unit). Quality varies across the area, but overall conditions are reasonable. The estate is a particularly useful source of smaller industrial/warehouse space, something strongly in demand across the County Borough. The industrial estate has a prospect of being retained for employment purposes for the foreseeable future.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		3

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	none	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a gym (D2)
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Recommendations

Future Recommendations:	The site should be retained for employment purposes, reflecting both its offer of micro business space and the presence of several large employers
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.
Classification: <u>(Annex D)</u>	Key Local Employment Sites
Does the site require safeguarding?	Yes

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Cwmtillery Industrial Estate
Site ID:	EMP2.11
Location:	Cwmtillery

Photo:



Map:



Site Description:	Cwmtillery Industrial Estate is located in the ward of Cwmtillery in the lower Ebbw Fach valley. To the south of the industrial estate is Abertillery Sports Centre and Abertillery Learning Community. To the east and west are residential properties. To the north is open land leading to Jim Owen field. There is a mix of unit sizes on site which are privately owned. The south of the site comprises a large production facility for Tillery Valley Foods, with a mix of smaller terraced/self-contained units to the north.
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Site Overview

Site Status:	Developed
Planning Status:	Primary Site - B1, B2 and B8.
Designations:	None
Constraints:	The site is wholly located in flood zone C2. The majority of the site lies within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	7.2
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	3927.2
B1 Other (sqm)	789.19
B2 (sqm)	11594.44
B8 (sqm)	49.4
Other Uses (sqm)	529.63
Total Vacant Units (sqm)	637.61
Site Vacancy Rate (%)	1 / 17 x 100 = 5.8%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site 0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located off Alma Street. The distance of the site to the A465 (dual carriageway) is 6.8 miles and the M4 corridor is 18 miles. In terms of public transport, the site is located 6.6 miles from Ebbw Vale Parkway Railway Station and 3.7 miles from Llanhilleth Railway Station. The site is located approximately 99m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The buildings are of adequate quality with some requiring maintenance and repair. The area is appropriately screened with areas of tree planting and grassed areas around the perimeter. At the northern tip of the estate stands a large vacant unit with room for expansion, however there is limited space for expansion within the rest of the industrial estate. There is appropriate provision for service vehicles affording space for manoeuvring.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	Relatively clean and tidy site. There are some smells from the Tillery Foods unit, although not significant to cause significant amenity concerns. The surrounding uses are not therefore detrimentally affected by the uses on the site. The public areas such as the grassed areas are well maintained however some of the buildings particularly the smaller units require maintenance and investment.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The site has a low vacancy rate of 5.8% which equates to one large unit to the north of the industrial estate. The units are rarely available and witness a quick turnover when vacated. The site would have a very real prospect of being retained for employment purposes for the foreseeable future. It also accommodates a key local food production company, and a range of valuable smaller employers, including a Royal Mail facility.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; an auctioneer (SG)
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Recommendations

Future Recommendations:	The site should be retained for a primary employment site, based on the range of occupiers and the reasonable quality of most units.	
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Photos





South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Roseheyworth Business Park
Site ID:	EMP2.12
Location:	Abertillery

Photo:



Map:



Site Description:	Roseheyworth Business Park is located in the Lower Ebbw Fach Valley in the ward of Cwmtillery. The business park is located immediately north of Roseheyworth primary school. To the east of the site are residential properties and to the west of the site is the Ebbw River and open countryside. To the north of the site is the area of Bourneville where there are residential properties and commercial businesses. The industrial estate can be accessed directly off the A467. Units on site are council owned with only 1 unit in private ownership. The north comprises a scheme of self-contained industrial units, the south a scheme of self-contained offices
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Site Overview

Site Status:	Partly developed
Planning Status:	Primary Site - B1, B2 and B8. A vacant allocated employment site is located within this boundary. See Potential Development Sites - Qualitative Site Information Proforma - EMP1.10 Land at Roseheyworth Business Park
Designations:	None
Constraints:	The industrial estate is partially located within flood zone B (along the western boundary). The majority of the site lies within a Coalfield area of low risk and partly within a Coalfield area of high risk.
Site Size (ha):	8.5
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	1,256.65
B1 Other (sqm)	1,992.70
B2 (sqm)	6,631.35
B8 (sqm)	0
Other Uses (sqm)	0
Total Vacant Units (sqm)	292.33
Site Vacancy Rate (%)	1/ 15 x 100 = 6.66%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site **1 allocated site - see separate proforma**

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located directly off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 2.6 miles and the M4 corridor is 21.1 miles. In terms of public transport, the site is located 4.7 miles from Ebbw Vale Town Railway Station and 4.2 miles from Llanhilleth Railway Station. The site is located approximately 700m from a bus stop. The A467 is a bus route. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The buildings are good quality buildings which are relatively well maintained. There is some space around the buildings which could allow for some expansion. There is an appropriate level of provision for service vehicles and manoeuvrability within the industrial estate. The buildings make a positive contribution to the immediate and wider area.
Overall Building Quality Score:	3
Overall Site Quality Score:	4

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	No noise, smells, dirt and dust - a pleasant environment. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. Significant soft landscaping throughout the industrial site in the form of trees, hedgerows and grassed areas. Entrance to the industrial estate site from the A467 is well maintained with flower beds and shrubbery. There is also good signage at the industrial site entrance.	
Overall Internal Environment Score:	4	
Overall External Environment Score	4	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The overall image of the site is very good. The site has a vacancy rate of 7% (equating to 1 unit). The site is partly owned by BGC GC (the smaller units) and the larger units are privately owned industrial units. There has been investment in the site in the last decade. Consent has now been granted for a Household Waste Civic Amenity Site on 0.79 ha of land in the south of the area, with access from the existing estate road provided along the eastern boundary of the site (also taking in the land most at risk from flooding). This use may slightly detract from the overall attractiveness of the area, but wider building and environmental quality remains good and the site particularly offers larger office options, not readily found elsewhere in the County Borough.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

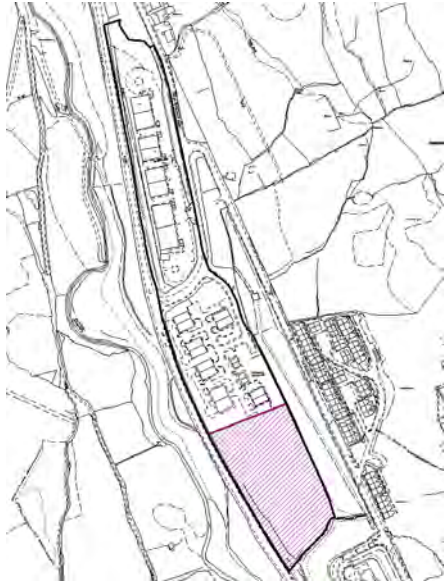
Site Notes

Site Notes and Further Comments:	Roseheyworth Business Park is split into two areas by Roseheyworth Road. The first area comprises of 4 no. larger semi-detached blocks of modern industrial units being of steel portal frame construction with brickwork and profiled sheeting to the external elevations under mono-pitched roofs. The second area consists of 7 no. smaller semi detached blocks of buildings which are of relatively modern design. The buildings are one storey and are made up of brickwork and metal roofing. The age of the small buildings are late 80s into the 1990s. The larger buildings to the north were constructed in early 2000's.
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Recommendations

Future Recommendations:	The site should be retained for employment use, reflecting good occupancy rates and the general quality of the stock.	
Any other actions:	Protect as 'Primary Site' in the LDP hierarchy.	
Classification: Annex D	Key Local Employment Sites	
Does the site require safeguarding?	Yes	

Vacant Land



photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Cwm Draw Industrial Estate
Site ID:	EMP2.13
Location:	Ebbw Vale

Photo:



Map:



Site Description:	Cwmdraw Industrial Estate is located in the Ebbw Fawr Valley in the ward of Ebbw Vale South. To the north of the site lies the residential area of Newtown. To the east the site abuts open countryside. The south of the site lies in close proximity to the residential areas of T-Llwyn and Waunlwyd. To the east the estate overlooks The Works site. The industrial Estate lies in close proximity to Ebbw Vale town centre at the northern edge and in close proximity to The Works towards the south-east. The site has an upper platform where the old Botcher factory once stood, this has now been demolished. The estate has a mix of council owned and privately-owned units, of varying quality, dispersed along several valley side roads.
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Site Overview

Site Status:	Partly developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The majority of the site lies within a Coalfield area of high-risk and partly within a Coalfield area of low risk
Site Size (ha):	14.8
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	313
B1 Other (sqm)	0
B2 (sqm)	1,315.72
B8 (sqm)	3264.54
Other Uses (sqm)	1383.02
Total Vacant Units (sqm)	657.63
Site Vacancy Rate (%)	$8 / 26 \times 100 = 30.76\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

2

Parcel 1 Site Size (ha):	0.39
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary)</u> :	Flat area of land located towards to the southern end of Cwmdraw industrial estate adjacent to Handmade Shoes. The land has some vegetation in the form of grass and trees. The site has planning history for the development of an industrial unit: c/2011/0266 - full approved; c/2014/0180 - full approved.

Parcel 2 Site Size (ha):	1.68
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary)</u> :	Flat area of land located towards to the southern end of Cwmdraw industrial estate at an elevated level to the rest of the industrial estate. Previously Botcher UK, the factory has since been demolished and the site is vacant. The site has very little vegetation. The eastern boundary of the site abuts Special Landscape Area - Mynydd Carn-y-Cefn & Cefn yr Arail (ENV2.4)

Market Potential

Accessibility

Description:	The industrial estate can be located off Steelworks Road to the southern end of the site which has good quality roads with good quality junctions however, the northern end of the site is accessed off a residential area via market square which has poor junctions, however the site can be accessed by the new Peripheral Distributer Road connecting to the south of the site. The distance of the site to the A465 (dual carriage way) is 2.9 miles and the M4 corridor is 22.1 miles. In terms of public transport, the site is located approximately 500 yards from Ebbw Vale Town Railway Station and 7.1 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	2

Building and Site Quality and Characteristics

Description:	There is a mix of unit sizes on site. The majority of the buildings are of poor quality and require maintenance and repair. There is limited space around some of the buildings for expansion. There is appropriate level of provision for service vehicles and manoeuvrability within the industrial estate.	
Overall Building Quality Score:	3	
Overall Site Quality Score:	3	

Environmental Factors

Description:	The site is not well kept or maintained. It does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There is an embankment of trees to the west and east of the site with some soft landscaping throughout the industrial site in the form of trees and grassed areas.	
Overall Internal Environment Score:	2	
Overall External Environment Score	3	

Market Attractiveness

Description:	The site lies in close proximity to and overlooks the Works which is an advantage in terms of locality, although in terms of road access the two are some distance apart. The site is in an elevated position and hidden to some extent at the southern end by an embankment of trees which act as a buffer between the estate and the surrounding area below. There has been no investment in the area and the overall image of the site is poor in parts with the smaller units in need of maintenance. There is a mix of council owned and private units on site. The site has a high vacancy rate of 30% which equates to 8 units.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	2	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

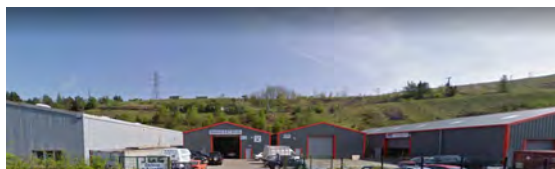
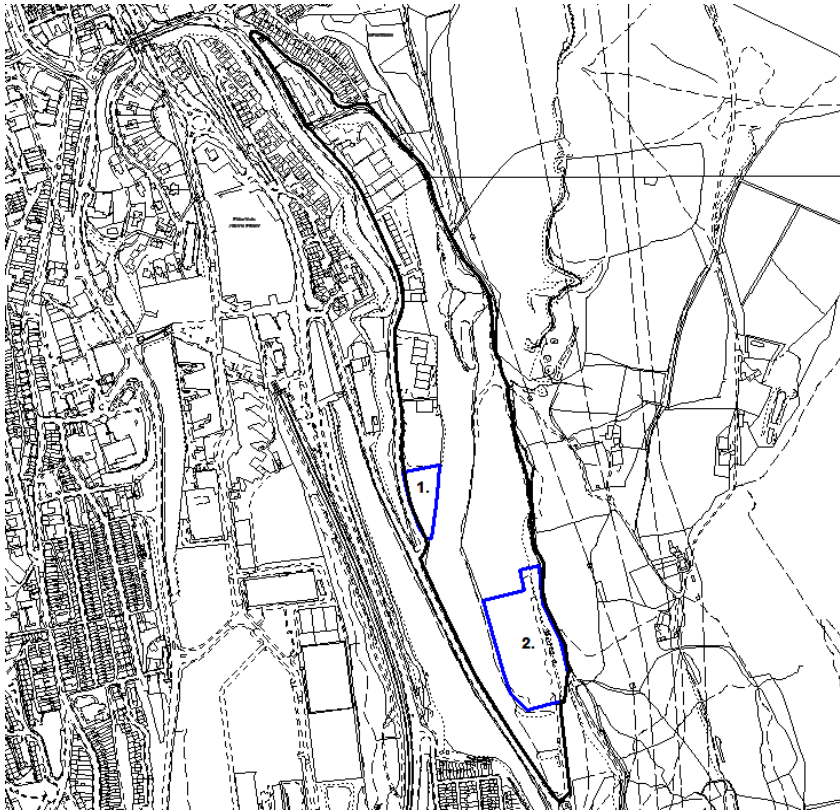
Site Notes

Site Notes and Further Comments:	Other uses on site include; second hand car sales (A2) and an MOT centre, car repair and body work garage, electronic motor repair service and a haulage vehicle depot (4 x SG). Part of the site lies on an upper platform some distance from the main part of the industrial estate. The Botcher factory once stood here but has been demolished and the site is now vacant. The boundary for the employment site could be re-drawn to exclude this area.
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Recommendations

Future Recommendations:	Main estate in the north is of reasonable quality, with a mix of occupiers. Would suggest the wider area boundary is too widely drawn, including several disused plots in the south with only limited linkages to the main employment area. Consider removing them from the allocation and allowing some flexibility as to growth in this southern part while protecting a more tightly defined employment area in the north.	
Any other actions:	Protect as 'Secondary Site' in the LDP hierarchy, in part at least.	
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	Maybe	

Vacant Land



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Marine Street Industrial Estate
Site ID:	EMP2.14
Location:	Ebbw Vale

Photo:



Map:



Site Description:	Marine Street Industrial Estate is located in the Ebbw Fawr valley in the Cwm Ward. The site is located at the southern end of cwm and is surrounded by residential properties on the northern and eastern boundaries, the site also lies in close proximity to the A4046. The western boundary abuts open countryside which is designated as Special Landscape Area ENV2.6 Cefn Manmoel and a Site of Importance for Nature Conservation ENV3.28 Ebbw River South Section. The south of the site is a Scheduled Ancient Monument - Marine Colliery Pumping Engine located on the employment allocation at Marine Colliery. Units on site are council owned. Area comprises four terraces of smaller workshops in the north and a low-grade HGV depot in the south.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The site lies partly within flood zone C1 and C2. The whole site lies within a low risk Coalfield area.
Site Size (ha):	1.3
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	387.1
B1 Other (sqm)	305.69
B2 (sqm)	388.5
B8 (sqm)	428.39
Other Uses (sqm)	132.93
Total Vacant Units (sqm)	824.25
Site Vacancy Rate (%)	$5 / 24 \times 100 = 20.83\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description:	The industrial estate can be located off the A4046 and via Marine Street through Cwm. The A4046 is a good quality road with good quality junctions. The distance of the site to the A465 (dual carriageway) is 8.1 miles and the M4 corridor is 18.2 miles. In terms of public transport, the site is located 2.1 miles from Parkway Railway Station Ebbw Vale and 3.0 miles from Llanhilleth Railway Station. The site is located adjacent to a bus stop on Marine Street. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description:	The site consists of a number of small units which require updating and some investment. There is limited space around the buildings. Provision for service vehicles and manoeuvrability is adequate. Soft landscaping on site is unkept and requires maintenance.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	There are no noise, smells, dirt or dust. The site produces no significant pollutants. Surrounding uses are not affected by activities on site. There are small areas of soft landscaping which are unkept. The site is in close proximity to local facilities.
Overall Internal Environment Score:	3
Overall External Environment Score:	3

Market Attractiveness

Description:	The overall image of the site is poor. The site looks unkept and the buildings are in need of maintenance. This is particularly true in the south where the HGV depot accommodates some low grade buildings. In the long term this open site may represent a redevelopment opportunity although the location may favour a residential use over employment. The northern units continue to serve a function accommodating local micro firms with a 21 percent vacancy rate at present.
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe
Is the market currently investing in the area?	No
Are there local facilities in the area that make the site more attractive?	Yes
Overall Market Attractiveness Score:	3

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses: heating supplies and trade counter (A1) and a physiotherapist (D1)
----------------------------------	--

Recommendations

Future Recommendations:	The site should be retained for employment use. Site serves a function at present, with a 79 percent occupancy rate, but continued monitoring is required to identify further evidence of decline. In the long term, plans for refurbishment and/or redevelopment may need to be considered.	
Any other actions:	Protect as 'Secondary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	Yes	

South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Sirhowy Hill Industrial Estate
Site ID:	EMP2.15
Location:	Tredegear

Photo:



Map:



Site Description:	The site is located in the Sirhowy ward. The site is accessed off Thomas Ellis Way. Residential properties border the northern and southern boundaries of the industrial estate. To the east is Sirhowy Hill Woodlands which is designated as a Local Nature Reserve. To the west of the site is the A4048. There is a mix of unit sizes on site which are privately owned by Hansteen, with two large units on the frontage (one now a gym) and smaller terraced workshops to the rear.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The majority of the site lies within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	1.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	310.4
B1 Other (sqm)	0
B2 (sqm)	675.70
B8 (sqm)	134.4
Other Uses (sqm)	3,113.93
Total Vacant Units (sqm)	1088.75
Site Vacancy Rate (%)	$4 / 12 \times 100 = 33.33\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site 0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description:	The site is accessed off Thomas Ellis Way. The distance of the site to the A465 (dual carriageway) is 2.9 miles and the M4 corridor is 23 miles. In terms of public transport, the site is located 3.4 miles from Ebbw Vale Railway Station and 9.3 miles from Llanhilleth Railway Station. The site is located approximately 648m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units. The new opening of Planet Fitness gym is causing parking problems due to its popularity.	
Overall Accessibility Score:	3	

Building and Site Quality and Characteristics

Description:	The larger industrial are attracting non industrial type uses such as gyms, the two largest units having benefitted from such investment. There is limited space around the buildings for expansion. There is enough provision for service vehicles on site.	
Overall Building Quality Score:	3	
Overall Site Quality Score:	3	

Environmental Factors

Description:	The site is a relatively clean and tidy and does not produce any significant pollutants. There are some compatibility issues with surrounding uses which are being affected by activities on the site. There are no public areas.	
Overall Internal Environment Score:	3	
Overall External Environment Score:	3	

Market Attractiveness

Description:	The site has a relatively high vacancy rate and tends to be occupied by non B uses such as gyms. The quality of many of the smaller units is low-moderate. The industrial estate has in the past struggled to let out the units for B uses. It is questioned whether the site would have a realistic prospect of remaining for employment should the site become vacant given the demand from non B uses.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	No	
Overall Market Attractiveness Score:	2	

Other Site Considerations

Adverse Impacts

Description:	There are complaints of noise and car parking issues from adjoining residents regarding the new Planet Fitness gym which is open 24hrs.	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	Yes	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a fitness gym and gymnastics club (D2) and a music recording studio (SG). A further application has been received for a change of use for unit 4 to an indoor obstacle challenge centre (D2).
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Recommendations

Future Recommendations:	Area has value, but for a broader mix of employment generating uses beyond the B-Class. Due to the pressure for alternative uses, it may be more beneficial to not protect the industrial estate and allow the estate to be guided by the market.	
Any other actions:	No	
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	No	

Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Bridge Street Industrial Estate
Site ID:	EMP2.16
Location:	Iron Row, Tredegar

Photo:



Map:



Site Description:	Bridge Street Industrial Estate is located in the Sirhowy Valley in the ward of Tredegar Central & West. To the west of the industrial estate is Tredegar Town Centre. To the north is Tredegar Business Park and land allocated for employment. To the east is the A4048 and the Sirhowy River. To the south is a builders yard and a Grade II Listed Building - Tredegar Company Shop. Units on the site are privately owned, and consist of terraced workshops, many in motor trade/repair uses.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The site is wholly located in flood zone C2. The site is wholly located within a Coalfield area of low risk
Site Size (ha):	0.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	347.67
B1 Other (sqm)	213.41
B2 (sqm)	425.01
B8 (sqm)	189.29
Other Uses (sqm)	490.85
Total Vacant Units (sqm)	0
Site Vacancy Rate (%)	0%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (<u>Areas should be mapped. Replicate table as necessary.</u>)	

Market Potential

Accessibility

Description:	Access to the industrial estate is via Iron Row and Bridge Street. Access cannot directly be achieved via Shop Row due to the poor state of repair of the Grade II Listed Building. The roads therefore can be difficult in that they are narrow with difficult site junctions. The estate is located directly adjacent to the A4048, 2 miles from the A465 (dual carriageway), and 22 miles from the M4 corridor. In terms of public transport the estate is located 4 miles from Ebbw Vale Town railway station and 10 miles from Llanhilleth Station. The site is located 408 m from the nearest Bus stops. There is sufficient, although not plentiful car parking spaces to the front of each unit.
Overall Accessibility Score:	2

Building and Site Quality and Characteristics

Description:	The buildings are small industrial units which are in a moderate state of repair. There is no space around the buildings for expansion. Servicing of the units can be achieved. The buildings have no adverse impact on the surrounding area.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	The site is free from environmental problems and is a relatively clean and tidy. The site is busy with vehicles which is directly due to the nature of uses on the site. The site does not produce any particular pollutants and therefore the surrounding uses are not detrimentally affected by activities on the site. There are no public areas.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description:	The site is fully occupied and there is a quick turnover when vacated. There are a number of B1, B2 and B8 uses on the industrial estate, with a particular strength in motor garages. The site is however attracting alternative uses such as cafes, gyms etc.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a café (A3), a carpet retailer and fitter, a tile shop and a motor parts shop (3x A1)
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Recommendations

Future Recommendations:	The site should be protected for a Key Local Employment Site. Although quality is moderate, the estate is in full use and provides useful micro business space, particularly for car garages which may not be able to afford options elsewhere.	
Any other actions:	Protect as 'Secondary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Key Local Employment Sites	
Does the site require safeguarding?	Yes	

Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Noble Square Industrial Estate
Site ID:	EMP2.17
Location:	Brynmawr

Photo:



Map:



Site Description:	Noble Square Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Brynmawr and is accessed off Blaenavon Road. To the north and east, the site abuts open countryside which is designated as a Special Landscape Area ENV2.2 Eastern Ridge & Mynydd James and a Site of Importance for Nature Conservation ENV3.93 . To the south of the site lies Blaenant Industrial Estate and to the west the site abuts a residential area. The site lies in close proximity to Brynmawr town centre and the Heads of the Valleys Road. There is a mix of unit sizes on site which are privately owned.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	3
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	0
B1 Other (sqm)	555.84
B2 (sqm)	3,559.24
B8 (sqm)	0
Other Uses (sqm)	914.27
Total Vacant Units (sqm)	0
Site Vacancy Rate (%)	0

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site 0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary).	

Market Potential

Accessibility

Description:	The industrial estate is located off Blaenavon Road via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriageway) is 0.6 miles and the M4 corridor is 18.8 miles. In terms of public transport, the site is located 3.4 miles from Ebbw Vale Railway Station and 8.1 miles from Llanhilleth Railway Station. The site is located approximately 800m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements, however this will require crossing very busy junctions. Cycle route T1.8 - Brynmawr to Blaenavon runs through the top section of the site, however it appears that there is no provision of cycle racks etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	4

Building and Site Quality and Characteristics

Description:	The larger heavy industrial units are in need of some maintenance and investment. The smaller units are in better condition and are located within a gated area with some landscaping and trees. There is space around the larger units for expansion and ample provision within the site for service vehicles and manoeuvring.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description:	The northern part of the site is of larger older industrial units of heavy industry. The smaller units are of a mix of uses other than industrial. The site does not produce any significant pollutants and therefore the surrounding uses are not detrimentally affected by activities on the site.	
Overall Internal Environment Score:	3	
Overall Extrenal Environment Score	3	

Market Attractiveness

Description:	There has been a consistently low vacancy rate on this site, which is presently fully let. There are a number of companies that have been well established on the site for some years. The smaller units are rarely available and witness a quick turnover when vacated.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:		5

Other Site Considerations

Adverse Impacts

Description:	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site include; a carpet supplier and fitter and a hydroponic equipment supplier (2 x A1), a Tai Quando gym (D2) and camper van conversions (SG).
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Recommendations

Future Recommendations:	The site should be retained as a secondary employment site. Contains a small, but well established group of SMEs.	
Any other actions:	Protect as 'Secondary Site' in the LDP hierarchy.	
Classification: <u>(Annex D)</u>	Key Local Employment Sites	
Does the site require safeguarding?	Yes	

Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Blaina Enterprise Centre
Site ID:	EMP2.18
Location:	Blaina

Photo:



Map:



Site Description:	The industrial estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. The industrial estate is a small industrial with small style units. The industrial estate is located to the south of Ysgol Gymraeg Brohelyg and Tai Calon offices. To the east of the estate is Rising Sun Industrial Estate and residential areas and to the west is the A467 and open countryside. The industrial estate can be accessed directly off the A467. Units on site are privately owned, comprising terraced workshops, many in trade/motor trade use.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service. The industrial estate as a whole is protected for employment.
Designations:	None
Constraints:	The majority of the site lies within a Coalfield area of high-risk and the northern tip of the site lies within a Coalfield area of low-risk.
Site Size (ha):	1.8
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	161.89
B1 Other (sqm)	879.29
B2 (sqm)	411.90
B8 (sqm)	317.17
Other Uses (sqm)	1,227.13
Total Vacant Units (sqm)	220.00
Site Vacancy Rate (%)	$3 / 28 \times 100 = 10.71\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel (Areas should be mapped. Replicate table as necessary):	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located directly off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The site is easily accessed via good quality roads with good quality junctions. The distance of the site to the A465 (dual carriage way) is 8.18 miles and the M4 corridor is 20.0 miles. In terms of public transport, the site is located 7.1 miles from Ebbw Vale Railway Station and 6.1 miles from Llanhilleth Railway Station. The site is located approximately 565 m from a bus stop. The A467 is a bus route. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The industrial estate comprises of two rows of terraced style industrial units which are small. The buildings are of moderate appearance and quality. There is limited space around the buildings so there is limited opportunity for expansion. The buildings are serviced to the front of the buildings.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	No noise, smells, dirt and dust - a pleasant environment. The site does not produce any significant pollutants. Surrounding uses are compatible with and are not affected by activities on site. There are no public areas within the industrial estate.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The site has a low vacancy rate at 10.7% (3 units). The area has a moderate quality appearance, but enjoys local prominence. It appears well used by a diverse group of local micro businesses. The industrial estate has a real prospect of being retained for employment purposes for the foreseeable future.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	3	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site are: a kitchen unit shop, electrical good supplier, car part supplier and a tile shop (4 x A1), a cafe (A3), a martial arts training centre (D2), vehical valeting, tyre fitting, supplier of hardware and an ironing centre (4x SG).
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Recommendations

Future Recommendations:	Given the mix of uses on the estate, the site should be retained as a secondary employment site. Location continues to serve a purpose accommodating a diverse group of micro firms.	
Any other actions:		
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	Yes	

Photos





South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Cwmcraehen Industrial Estate
Site ID:	EMP2.19
Location:	Brynmawr

Photo:



Map:



Site Description:	Cwmcraehen Industrial Estate is located in the Upper Ebbw Fach Valley in the ward of Nantyglo. The industrial estate is located off Blaenant Road and lies in close proximity to Brynmawr town centre and Lakeside Retail Park. The industrial estate abuts two other industrial estates, Blaenant to the north, Barleyfield to the West. Part of the eastern boundary also abuts a Special Landscape Area - Eastern Ridge & Mynydd James (ENV2.2). To the east of the site is an established Gypsy Traveller site. South of the site lies the residential area of Nantyglo. Units on site are privately owned, comprising two main small-mid sized industrial and storage units of moderate quality, plus several open storage sites.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The site lies partly within a Coalfield area of high risk and partly within a Coalfield area of low risk
Site Size (ha):	6.1
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	0
B1 Other (sqm)	0
B2 (sqm)	0
B8 (sqm)	0
Other Uses (sqm)	1,491.66
Total Vacant Units (sqm)	0
Site Vacancy Rate (%)	0%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

4

Parcel 1 Site Size (ha):	0.74
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	A flat area of land which abuts the Gypsy Traveller site. The site has undergone cleaning due to contamination from previous use as a waste site. Planning history on the site includes the erection of a steel framed building (c/2011/0129) which is to be demolished as part of the site clearance (c/2018/0177).

Parcel 2 Site Size (ha):	0.63
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	A flat area of land previously used by Lewis Skip Hire to store and rent skips. A planning application was refused in 2012 for the importation, stockpiling and recycling of inert materials and storage and operation of associated grading and crushing machines (retention c/2012/0201)

Parcel 3 Site Size (ha):	1.53
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	Site is located to the east of the site adjacent to an access road. A flat area of land with foliage and some tree coverage.

Parcel 4 Site Size (ha):	0.65
Suitable for Redevelopment?	Yes
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	Site is located to the east of the site adjacent to an access road. Roberto Neckwear is located next to this vacant area of land. The land is flat with foliage and some tree/shrub coverage.

Market Potential

Accessibility

Description:	The site is accessed from Blaenant Industrial Estate. The distance of the site to the A465 (dual carriageway) is 0.6 miles and the M4 corridor is 18.9 miles via the A4043. In terms of public transport, the site is located 3.4 miles from Ebbw Vale Railway Station and 8.1 miles from Llanhilleth Railway Station. The site is located approximately 400m from a bus stop. Pedestrian access to the site can be achieved on foot via pavements. There appears that there is no provision of cycle racks etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.	
Overall Accessibility Score:	4	

Building and Site Quality and Characteristics

Description:	There are two buildings on this site which are operational under the same company. The buildings are of good quality and well maintained. The rest of the site is currently undergoing a cleaning operation due to the levels of waste previously left on-site from Lewis Skips. This gives the site a poor appearance .	
Overall Building Quality Score:	3	
Overall Site Quality Score:	1	

Environmental Factors

Description:	Poor quality appearance for the majority of this site. There is possible pollution/contamination present from the previous waste business. The site is currently undergoing a cleaning process.	
Overall Internal Environment Score:	1	
Overall External Environment Score:	1	

Market Attractiveness

Description:	The site lies in close proximity to amenities within Brynmawr Town Centre and is located near to the Heads of the Valleys Road. However, immediate access roads are more constrained. The bulk of the estate is in backlands, and includes a number of bad neighbour uses. Land is available for growth but is unlikely to be a priority for businesses or developers. The site has a 0% vacancy rate as there is only one business on-site and both units are operational.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe	
Is the market currently investing in the area?	Maybe	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	2	

Other Site Considerations

Adverse Impacts

Description:	Yes previous issues of smells and contamination. However, the site has since been cleared. Terra Firma is currently onsite looking at possible ground contamination issues.	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	Yes	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	Other uses on site: a service and repair centre for grass mowers (SG)
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Recommendations

Future Recommendations:	The boundary of the site will need to be reconsidered in terms of the new gypsy traveller site. However, given the location only has one premises occupier, in non B-Class use, plus approx. three open storage uses/vehicle depots, two with narrow road access, the location is of limited economic value. Given area conditions and neighbouring uses it is unlikely to attract many further new businesses. It is therefore recommended that the area is not allocated in the LDP as a B-Class employment area but left free to accommodate a broader range of uses which could generate economic and community value, appropriate to the location.	
Any other actions:		
Classification: <u>(Annex D)</u>	Neighbourhood Employment Sites	
Does the site require safeguarding?	No	

Vacant Land



Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Glandwr Industrial Estate
Site ID:	EMP2.20
Location:	Llanhilleth, Abertillery



Map:



Site Description:	Glandwr Industrial Estate is located in the ward of Llanhilleth in the lower Ebbw Fach Valley. To the west of the industrial estate runs the Ebbw river and the A467, in which the industrial estate can be directly accessed from. To the north of the industrial estate are residential properties. To the south is the residential area of Llanhilleth which also includes Llanhilleth railway station, the Miners Institute and Llanhilleth Industrial Estate. To the east is the B4771 road. All units on site are privately owned, comprising a linear group of mostly modern, good quality terraced industrial units.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service.
Designations:	None
Constraints:	The western boundary and the northern third of the industrial estate are located in flood zone C2. The builders yard to the north is located in flood zone C1. The site is wholly located within a Coalfield area of low risk.
Site Size (ha):	6.9
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	237.71
B1 Other (sqm)	1,666.09
B2 (sqm)	8,346.59
B8 (sqm)	462.18
Other Uses (sqm)	4,464.40
Total Vacant Units (sqm)	3,591.66
Site Vacancy Rate (%)	14 / 39 x 100 = 35.89%

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <u>(Areas should be mapped. Replicate table as necessary).</u>	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located directly off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The distance of the site to the A465 (dual carriageway) is 7.6 miles and the M4 corridor is 16 miles. In terms of public transport, the site is located 6.4 miles from Ebbw Vale Railway Station and 0.6 miles from Llanhilleth Railway Station. The site is located approximately 374m from a bus stop. The A467 is a bus route. There is pedestrian access within the site via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units. The area appears congested with cars particularly where the new units are located.
Overall Accessibility Score:	3

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	The south eastern section of the industrial estate contains new modern industrial units. The western boundary of the site is predominantly older industrial buildings although there have been a few new units built. Due to the recent investment in the industrial estate there is now limited space around the buildings for expansion. The provision for servicing and manoeuvring appears adequate. The buildings make a fairly positive contribution to the immediate and wider area.
Overall Building Quality Score:	3
Overall Site Quality Score:	3

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	The site is a relatively clean and tidy site which is free from environmental problems. The site does not produce any particular pollutants and therefore compatible with surrounding uses. The only area where there may be a problem is the northern section of the industrial estate where the builders yard is located immediately adjacent to residential properties. There are no public areas as the industrial estate is densely built up.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The site vacancy reflects the construction of new units on site, most of which have now been occupied. The site has therefore witnessed new investment and accommodates a number of higher value most B2 uses. It also enjoys strong A-road access and should be retained for employment in the foreseeable future.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Yes	
Is the market currently investing in the area?	Yes	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	5	

Other Site Considerations**Adverse Impacts**

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	
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Recommendations

Future Recommendations:	The site should be retained for employment purposes, reflecting the recent investment here and the generally high quality of its offer of B2/B8 premises. Given the reasonable quality of much of the stock and strong A-Road location, it is recommended that it be considered a Primary rather than Secondary employment site.	
Any other actions:	Given site conditions, it is recommended that it be protected as a 'Primary Site' in the LDP hierarchy	
Classification: (Annex D)	Secondary Employment Sites	
Does the site require safeguarding?	Yes	

Photos



South East Wales Regional Employment Land - Blaenau Gwent

Existing Sites/Developed Allocations - Qualitative Site Information

Site Details

Site Name:	Llanhilleth Industrial Estate
Site ID:	EMP2.21
Location:	Abertillery

Photo:



Map:



Site Description:	The industrial estate is located in Abertillery in the ward of Llanhilleth. To the north of the industrial estate is Llanhilleth Bowls Club and Llanhilleth primary school. To the east is the railway line and open countryside and to the west is the Ebbw River and open countryside. The site can be directly accessed off the A467. The industrial estate is small with 17 units. All units on site are council owned, comprising a mix of terraced units of moderate - good quality.
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Site Overview

Site Status:	Developed
Planning Status:	Secondary Site - B1, B2, B8 and an acceptable commercial service
Designations:	None
Constraints:	The industrial estate is wholly located in flood zone B. The site is wholly located within a Coalfield area of low risk
Site Size (ha):	0.74
Site Type:	Brownfield

Overview of Gross Existing Floorspace on Site

B1 Office (sqm)	200.68
B1 Other (sqm)	1074.88
B2 (sqm)	596.56
B8 (sqm)	94.12
Other Uses (sqm)	0
Total Vacant Units (sqm)	333.72
Site Vacancy Rate (%)	$2 / 17 \times 100 = 11.76\%$

Vacant Parcels of Land on Existing Site

Number of vacant parcels on site

0

Parcel 1 Site Size (ha):	
Suitable for Redevelopment?	
Description of Parcel <small>(Areas should be mapped. Replicate table as necessary).</small>	

Market Potential

Accessibility

Description: (Including information on local and strategic access, public transport, pedestrian/cycle access, internal circulation and parking).	The industrial estate is located directly off the A467 (single carriageway) providing a connection to the south of the Borough towards the M4 corridor and the north of the Borough to the A465. The distance of the site to the A465 (dual carriageway) is 8.7 miles and the M4 corridor is 15 miles. In terms of public transport, the site is located 7.4 miles from Ebbw Vale Railway Station and 0.4 miles from Llanhilleth Railway Station. The site is located approximately 470m from a bus stop. The A467 is a bus route. Pedestrian access to the site can be achieved on foot via pavements. It appears that there is no provision of cycle racks or cycle lanes etc. Parking for each industrial unit is to the front of the units and there appears to be no issues with the amount of car parking spaces.	
Overall Accessibility Score:	3	

Building and Site Quality and Characteristics

Description: (Including information on the quality and age of buildings, the space around the buildings and servicing).	There is a mix of quality of buildings on the industrial estate. The unit blocks on the east and west of the estate are older industrial buildings which require updating and some investment. The detached buildings on the northern and southern edge (Tredegar Brewery and Pioneer Leisure) of the estate are newer modern buildings in a good state of repair. There is limited space around the buildings for expansion. Provision for service vehicles and manoeuvrability is adequate.	
Overall Building Quality Score:	3	
Overall Site Quality Score:	3	

Environmental Factors

Description: (Including information on the internal and external environment of the site e.g. noise, smell, dirt/dust, general pollution, topography etc).	There is no smell, or dirt/dust. There is limited soft landscaping within the industrial estate. Any tree coverage and landscaping is on the boundaries of the site. There is a railway line that runs parallel to the site on the eastern boundary so there is potential for noise.	
Overall Internal Environment Score:	3	
Overall External Environment Score	3	

Market Attractiveness

Description: (Including information on the feasibility of the site remaining for employment uses, local market evidence, improvement prospects, special opportunities and the overall image of the site).	The area has a strong location off the A467 and appears well occupied. The quality of the space is mixed, but does include some modern, good quality industrial units that will be attractive to the market.	
If the site became vacant, would there be a reasonable prospect of it being re-used for its current/previous use?	Maybe	
Is the market currently investing in the area?	No	
Are there local facilities in the area that make the site more attractive?	Yes	
Overall Market Attractiveness Score:	4	

Other Site Considerations

Adverse Impacts

Description: (Including information on any adverse impacts of the existing use (or previous use, if vacant) on neighbours or the environment).	None	
Any Adverse Impacts of the Existing/Previous Use on Neighbours or the Environment?	No	

Alternative Uses

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

Site Notes

Site Notes and Further Comments:	
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Recommendations

Future Recommendations:	The site should remain as a secondary employment site which allows an acceptable commercial service as well as B1, B2, B8 and SG uses. This reflects the reasonable quality of the location and the fact that it appears well used.	
Any other actions:	Protect as 'Secondary Site' in the LDP hierarchy.	
Classification: (Annex D)	Key Local Employment Sites	
Does the site require safeguarding?	Yes	

Photos



