

# Bridgend Local Development Plan

2006-2021

Cyngor Bwrdeistref Sirol



## Employment Land Review

June 2010



## **Bridgend Local Development Plan 2006 – 2021**

### **Employment Land Review**

**June 2010**

**Development Planning  
Regeneration and Development  
Communities Directorate  
Bridgend County Borough Council  
Angel Street, Bridgend  
CF31 4WB**



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## **Executive Summary**

This report assesses the supply, need and demand for employment land and premises in Bridgend County Borough. It has been carried out by Bridgend County Borough Council's Development Planning section, utilising the professional internal expertise of the Economic Development Unit and Property department to inform the study.

The report has been undertaken in order to provide a robust piece of evidence to underpin and inform the Local Development Plan (LDP) which the Council is currently preparing. When adopted, this will supersede the Bridgend Unitary Development Plan and covers the period: 2006 – 2021.

From a review of national, regional and local policies and strategies, it is clear that Bridgend County Borough needs a strong, varied and flexible portfolio of employment sites if it is to meet the needs of the County Borough throughout the Local Development Plan period up to 2021.

National planning policy states that Development Plans can cater for non identified need as well as that which is provided by forecasts. Local Authorities should therefore allocate sites having regard to the need for flexibility as well as offering a range of choice of sites in sustainable locations which meet the needs of the market as well as enabling policy-led developments to occur. However this needs to be balanced against the need for realism in allocating sites and consideration should be given to alternative uses for sites which have remained allocated, but undeveloped, for a long period of time.

The general thrust of spatial policy in terms of employment as identified in the Wales Spatial Plan and the emerging Bridgend LDP is to build upon the economic success of the M4 corridor area, whilst also seeking to actively encourage new development in the northern valley areas to regenerate communities. This may require a strong public sector role in bringing sites forward in Bridgend and using 'strategic intervention' as highlighted in Bridgend's Regeneration Strategy to bring key sites forward for development.

It is clear that employment land and sites need to be responsive to the needs of modern business and investment practices and be in the right location as well as being ready to develop or occupy at short notice.

## **Economic Profile**

Bridgend County Borough and its immediate surroundings are relatively self-contained in terms of its employment market. The County Borough has an average work force in terms of employment type however the number of self employed persons is well below the national average. The County Borough relies on the public sector to provide a third of all jobs compared to just over a quarter in the British average, reliance on Manufacturing is also high.

The overwhelming majority of jobs and businesses in the County Borough are located in the town of Bridgend. Whilst this enhances the role of the town as the economic hub of the County Borough, it highlights the issue that other areas of the County Borough are potentially under-provided for in terms of jobs. This encourages commuting within the County Borough and does not promote sustainable communities. The biggest disparities appear to occur in the three valley areas however the extent to which this issue can be addressed is limited due to the availability of appropriate located sites in these topographically restrictive areas. Every encouragement, however, can be made to promote acceptable small scale employment generating uses within urban areas (on unallocated sites), as per national planning policy guidance.

The Business Profile of the County Borough is also positive with plenty of assistance available from the County Borough Council and other agencies with a wide variety of support mechanisms in place, combined with an attractive area within which to work.

### **Current Situation**

There is a plentiful supply of employment land and premises across the County Borough. This should be viewed both positively; in terms of the County Borough's offer of a range and choice of flexible employment sites, as well as negatively; in acknowledging that some of these sites have remained vacant for significant periods of time with little or no interest for their development for employment purposes. These issues will need to be balanced by the recommendations from this report.

In recent years there has always been a good supply of vacant premises available for occupation. Despite this, development of vacant, allocated employment land has always occurred at a long-term average rate of 6.33 hectares per annum.

An initial assessment of existing employment site finds that:

- ◆ Those strategic employment sites identified in the LDP Preferred Strategy will be carried forward to the final portfolio
- ◆ Other sites with known development interest for mixed uses should be investigated further with a view to reassessment. This may mean that the employment element is reduced or excluded all together. However a thorough assessment of market need and spatial policy-led issues will need to be undertaken prior to a final decision being made on this.
- ◆ Those other part-developed industrial estate areas with remaining vacant plots of land will be carried forward to the final portfolio
- ◆ There are significant opportunities for the redevelopment of some existing large employment sites during the plan period which need to be taken into account.

## **Property Market**

There appears to be some short term uncertainty over the future state of the employment property market; however this situation is not necessarily restricted to Bridgend but is representative of the national picture.

There is a view that employment land should be released along the M4 corridor and, as previously stated, there are concerns regarding the peripheral estates of the County Borough and their ability to attract investment.

The suggestion is that Bridgend will become a more attractive place to invest in if rents across the region keep on rising. However there is a need to ensure that the labour and skills are in place to be part of an attractive package to promote the area and its available employment land. This issue is being addressed under initiatives in the Bridgend Regeneration Strategy. Focus should also be given to the delivery of smaller developments to attract SMEs etc. and those developments which will appeal to those businesses looking to expand.

In terms of the type of development required, opinion was mixed on the future of both the office and industrial sectors in the County Borough. The emphasis therefore must be on flexibility of employment sites to bring forward all kinds of employment development with less regulation to encourage diversity on sites to meet demand. The quality of development did not seem to be raised as an issue; however it was noted that expensive prestigious schemes would be hard to attract to the area.

It is stated that Bridgend needs to maintain its consistent level of available sites to meet demand and that public sector agencies should respond appropriately to release sites. However, this is allied with a request for a more relaxed policy approach regarding trade counter / leisure uses on employment sites.

## **Business Survey**

A survey of existing businesses in the County Borough gives a broad idea of the requirements of businesses in the future. These can be summarised as follows:

- ◆ The Bridgend sub area will be the most popular location for businesses to locate to or grow within;
- ◆ Access and location will be the most important factors considered when choosing to grow or relocate a business;
- ◆ There will be a general requirement for both industrial and office premises; this reflects the comments from the property professionals; and
- ◆ The majority of companies will look for moderately classed standards of development; again, reflective of comments in the previous section.

## Employment Land Projections

Quantitative projections range from a negative requirement of 0.21 hectares to 88.5 hectares of employment land required over the LDP Plan period up to 2021.

The trend-based projection, taking into account development over a 10 year period and carrying this forward gives a good indication of how employment land can be developed in periods of economic prosperity and down-turn. It also accommodates those years where large-scale developments take place (for example at strategic sites) and those when activity is quieter. It is, however, a very crude way of assessing future need. Notwithstanding this, perhaps this wider, broader way of predicting future need is a more appropriate way of accommodating future development in a period of economic uncertainty. Unlike the other models, by using past development rates, this calculation method could effectively be seen as taking into account those companies which will occupy existing premises which are currently vacant.

For these reasons, it is therefore considered that using past development rates more accurately reflects the future employment land requirements of the County Borough.

It is important to stress that this figure is an illustration of the **need** for vacant employment land. The **supply** portfolio of vacant land, as confirmed in the LDP, will need to ensure that it offers a range and choice of sites which are flexible enough to meet the development need wherever it arises and if it is derived from the market or is a policy-led initiative.

## Conclusions

There is potential to allocate up to 153 hectares of vacant employment land in Bridgend County Borough at the present time. Whilst on current average development rates this would give a 24 year supply it is important to reiterate the advice in Planning Policy Wales which states that:

***“sufficient land suitable for development for enterprise and employment uses and well served by infrastructure is designated for employment so as to meet both identified and as yet unidentified needs; and that new development for enterprise and employment uses is located and implemented in accordance with sustainability principles”.*** (Council’s Emphasis)

From this assessment it is clear that sufficient land is allocated for employment uses in the County Borough. In examining what might seem to be a large supply figure, it should be noted that over 57 hectares are included on just 2 sites: Brocastle and Island Farm. Therefore a significant contribution could (or could not) come from these two areas, parts of which may come forward after the end of the LDP. Notwithstanding this, the remaining 106 hectares could still deliver sufficient land for the LDP Plan period. It is vitally



important the Council keeps a range and choice of employment sites which are attractive and flexible enough to potential investors and to this end, Brocastle and Island Farm can provide the type of high quality environments that are generally not available on many of the remaining sites.

In examining the distribution of the new portfolio it is clear that the majority of land is located in the Bridgend sub area (notwithstanding the two sites mentioned above also being located here). However, it is clear that this is the area where most of the market-led demand will come from. The proposed supply table also provides for a range of sites in areas which may not be attractive to the market, but where the public authorities may wish to bring forward employment development to serve wider economic aims and objectives, particularly in areas where there is high unemployment or that have been affected by recent company closures.

This situation will need to be kept under review and the Council's current annual survey and liaison between the Development Planning and Economic Development sections, together with the new employment land database to monitor land use will ensure that long term planning and strategy decisions are taken in an informed environment.

## 1. Introduction

- 1.1 This report assesses the supply, need and demand for employment land and premises in Bridgend County Borough. It has been carried out by Bridgend County Borough Council's Development Planning section, utilising the professional internal expertise of the Economic Development Unit and Property department to inform the study.
- 1.2 The report has been undertaken in order to provide a robust piece of evidence to underpin and inform the Local Development Plan (LDP) which the Council is currently preparing. When adopted, this will supersede the Bridgend Unitary Development Plan and covers the period: 2006 – 2021.
- 1.3 Bridgend County Borough is a Unitary Authority and lies at the geographical heart of South Wales. It is bordered by Neath Port Talbot County Borough to the west and north, Rhondda Cynon Taff County Borough to the north and north east, and by the Vale of Glamorgan Council to the east. It has an area of about 25,500ha, and had a Census population of 128,645 in 2001. The latest Registrar General's Mid –Year Estimate shows that this had risen to 133,900 people in 2008.
- 1.4 The largest settlement and administrative centre of the County Borough is the town of Bridgend. The two other largest towns are Maesteg and Porthcawl. Bridgend owes its origin to its strategic location at the lowest bridging point on the River Ogmore, where east to west, and north to south, traditional trade routes met. It was originally a small market town serving the western agricultural community of the Vale of Glamorgan which grew when the coal mining industry flourished to the north. The local road and railway network was developed to provide access to communities from the rest of South East Wales, taking advantage of Bridgend's strategic location. With further planned post-War urban growth based on local manufacturing, it became the administrative centre for the area. From the late 1970s to date, it has grown once more in response to commuter housing pressures generated from its proximity to Cardiff, and general economic growth westwards along the M4 Motorway corridor.
- 1.5 The wider settlement structure of the County Borough still reflects its agricultural and industrial heritage. The coal mining industry fostered the growth of Maesteg in the upper Llynfi Valley, and many smaller towns and villages, such as Blaengarw, Pontycymmer, Nantymoel, Ogmore Vale and Evanstown in the Garw and Ogmore Valleys, and Pyle, Kenfig Hill, Cefn Cribwr, Tondy, Aberkenfig, Ynysawdre, Sarn, Bryncethin, Brynmenyn, Heol-y-Cyw and Pencoed, in the more southerly coalfield fringe.
- 1.6 Porthcawl grew initially as a small port with rail links to the valleys and the coal mining industry. Later, in the inter-War period, it prospered as

a popular coastal tourist resort. During the post-World War II period, it expanded significantly, along with the village of North Cornelly and the town of Pyle, to provide housing for workers in the growing iron and steel industry in nearby Port Talbot.

- 1.7 A number of key transport corridors pass through the County Borough. The M4 links Swansea to London via Cardiff and dissects the area from east to west. From this, the A473, A48 and A4229 filter traffic into Bridgend, Porthcawl and southern areas; whilst the A4063, A4064 and A4061 serve the Llynfi, Garw and Ogmore Valleys respectively.
- 1.8 The South Wales Main Line railway also crosses the County Borough from east to west with the principal station of Bridgend acting as a stop for Intercity services between Swansea, Cardiff and London. It also is the terminus of the Vale of Glamorgan line via Rhoose (with a link to Cardiff International Airport) and Barry. The Llynfi Valley is served by an hourly branch line service to Maesteg which also stops in Pencoed. Additionally there is a station on the main line at Pyle which is served by a 2 hourly intra-regional service between Swansea and Cardiff.
- 1.9 Major employers, key to the local economy are the County Borough Council and other public sector organisations which account for approximately a third of all jobs. Significant private sector employers include:
- |   |  |
|---|--|
| ◆ 3M Healthcare                             | ◆ Harman Motive Ltd                        |
| ◆ Airborne Systems                          | ◆ Invacare UK                              |
| ◆ Aircraft Maintenance Support Services Ltd | ◆ John Raymond Transport                   |
| ◆ Astra Games LTD                           | ◆ JW Morris                                |
| ◆ Biomet UK                                 | ◆ Lloyds TSB Telephone Banking             |
| ◆ Buy as you View                           | ◆ Logica                                   |
| ◆ Coppice Alupack LTD                       | ◆ Rockwool Ltd                             |
| ◆ Day's Healthcare                          | ◆ S A S International                      |
| ◆ Dunraven Manufacturing                    | ◆ Sony UK Technology Centre                |
| ◆ Ford Motor Company                        | ◆ Steinhoff UK Furniture Ltd               |
| ◆ Gardner Aerospace Wales Ltd               | ◆ TES Aviation                             |
| ◆ Georgia Pacific GB Ltd                    | ◆ Tyco Water Works (Atlantic Plastics) Ltd |
- 1.10 Employment is concentrated in Bridgend Town and the south-eastern corner of the County Borough; however there are pockets of employment sites, land and premises in all the major towns of the County Borough and along the strategic highway network.

## Methodology

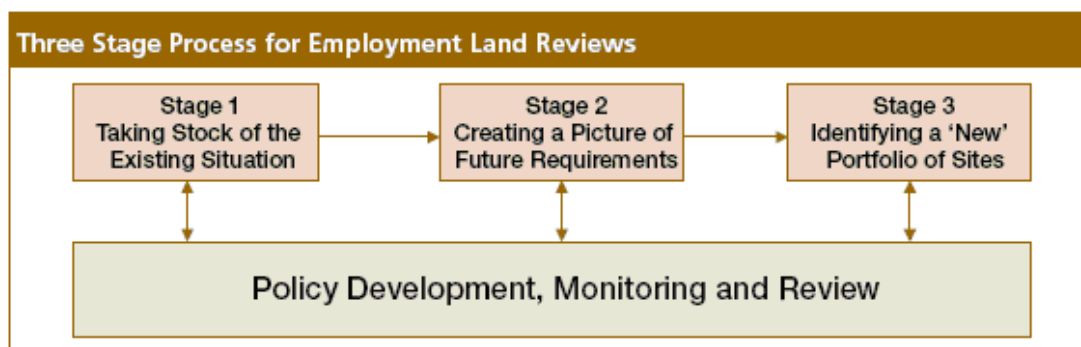
1.11 The methodology used to undertake this assessment is taken from: *Employment Land Review: Guidance Note* which was produced by the then Office for the Deputy Prime Minister in 2004 (now the Department for Communities and Local Government). This best practice guidance was issued for England; however, no similar advice has been issued in Wales to date. Notwithstanding this, the approach outlined is applicable to Wales and Bridgend.



1.12 Incorporating the advice contained within the advice note, this report also draws on good practice found elsewhere in South Wales. The Guidance suggests a three stage assessment to the work which is summarised in Figure 1.1 below.

### Figure 1.1 Three Stage Process for Employment Land Reviews

Source: Employment Land Review: Guidance Note, ODPM (2004)



1.13 Stage One of the process involves an initial assessment of the existing situation including existing allocated employment sites and identifies the best sites which need to be protected and those which can be released for other purposes. Stage Two seeks to understand the future requirements for employment land and premises and provides a breakdown of those requirements by quality and location as well as providing an indication of any 'gaps' in supply between this and economic forecasting. The outcome of stage two is a broad indication of land requirements and an analysis of the requirements of any shortfall in supply which will need to be addressed. Stage Three entails a review of all sites in the existing portfolio to ascertain their potential to meet any shortfall identified in stage two. Additional sites also need to be assessed for their suitability.

1.14 The outcome of the assessment procedure will be a new portfolio of employment sites in Bridgend County Borough which meet the future needs of businesses and economic forecasts. These sites will be recommended to be taken forward for potential allocation in the deposit Bridgend Local Development Plan.

## STAGE ONE – TAKING STOCK OF THE EXISTING SITUATION

### 2. Strategic Context

2.1 The preparation of an employment land assessment should consider the planning and strategic employment framework at the national, regional, sub-regional and local authority level. A summary of the key documents relevant to the assessment are considered below:

#### National Policy Context

##### One Wales

2.2 One Wales presents the high level strategic direction agreed by the Labour and Plaid Cymru groups in the National Assembly. The aspirations of the agreed agenda for governance are presented under the following themes:

- ◆ A Healthy Future
- ◆ Living Communities
- ◆ A Fair and Just Society
- ◆ A Rich and Diverse Culture
- ◆ A Prosperous Society
- ◆ Learning for Life
- ◆ A Sustainable Environment

2.3 The 'Prosperous Society' theme has particular relevance to the employment land and premises agenda with commitments to: create jobs across Wales; stimulate enterprise and business growth; and enhance skills for jobs.

#### Planning Policy Wales 2002

2.4 National planning policy in relation to employment and employment land is found within Chapter 7 of Planning Policy Wales (PPW). This document states that all communities need employment opportunities and that it is the role of local planning authorities to formulate and implement policies for industrial and other employment generating and wealth-creating development, giving particular regard to small and medium sized enterprises.



2.5 Paragraph 7.1.7 of PPW instructs LPAs to ensure that:

***“sufficient land suitable for development for enterprise and employment uses and well served by infrastructure is designated for employment so as to meet both identified and as yet***



***unidentified needs; and that new development for enterprise and employment uses is located and implemented in accordance with sustainability principles”.***

2.6 In addition, paragraph 7.2.1 highlights the fact that:

***“Some local planning authorities have allocations of land for employment and other uses which cannot realistically be taken up in the quantities envisaged over the lifetime of the UDP. Local planning authorities should therefore review all their non-housing allocations when preparing or reviewing their UDPs and consider whether some of this land might be better used for housing or mixed use developments or no longer be designated for development”***

2.7 It is clear from national policy therefore that whilst Development Plans can and should be flexible in meeting both identified and unidentified need, this should not be to such a degree that sterilises land for employment uses over a long period of time. The consideration of sites for mixed uses also raises the questions of comprehensive developments which can help provide / cross-subsidise an element of employment use by providing speculative office / commercial buildings on sites which otherwise may not have been brought forward.

## **Wales Spatial Plan**

2.8 The Wales Spatial Plan was first adopted by the National Assembly for Wales in 2004; it was subsequently updated in 2008 and provides a national vision which focuses on:

- ◆ cross-boundary regional working
- ◆ growth and development of ‘key settlements’
- ◆ ‘cross boundary settlements’ and the key ‘international, interregional and regional links’ that will allow regions to look outwards and work with their neighbours.



2.9 The Plan also contains a detailed strategy for the six spatial plan areas of Wales. This includes South East Wales (The Capital Network) within which Bridgend County Borough is situated. The vision for this area is:

***“An innovative skilled area offering a high quality of life - international yet distinctively Welsh. It will compete internationally by increasing its global visibility through stronger links between the Valleys and the coast and with the UK and Europe, helping to spread prosperity within the area and benefiting other parts of Wales.”***

- 2.10 South East Wales is recognised as Wales' most populated area but characterised by major economic and social disparities. Its coastal zone is its main economic driver, and the competitiveness of the region needs to be 'sustained to help raise the economic potential of Wales. The heavy commuting flows between the Valleys and the coast mean that the area functions as an interdependent but unplanned urban network. This gives rise to pressure on transport infrastructure'. As a 'key centre' in the region Bridgend is seen as having a close functional relationship with Cardiff and other neighbouring towns.
- 2.11 The Area Framework for South East Wales - The Capital Network, divides the region into three distinctive 'spatial subsets' or sub-regions, (see figure 2.1) all of which traverse Bridgend County Borough. The 'City Coast zone' of the Spatial Plan area in particular is seen as having 'high quality employment sites', particularly where they represent locational or large site opportunities for inward investment, which should be reserved for uses which maximise strategic economic benefits.

**Figure 2.1 Wales Spatial Plan: South East Wales**



- 2.12 The Area Framework envisages that at the heart of the vision for the region there will be a network of strong, sustainable communities spreading prosperity from Cardiff and Newport to the valleys across the region.

2.13 The main priorities of relevance to employment and employment land are highlighted below:

*Building Sustainable Communities*

- ◆ The Plan reiterates the need for South East Wales to function as a city-region, spreading prosperity from the two major centres of Cardiff and Newport northwards.
- ◆ Achieving the Vision is dependent on realising the potential and managing any pressures from existing development opportunities
- ◆ Development will need to be carefully managed to avoid excessive strain on infrastructure and other essential services and to ensure environmental impact is minimised.

*Achieving Sustainable Accessibility*

- ◆ Public transport should operate sufficiently frequently that passengers can “turn up and go”
- ◆ Seating capacity should be sufficient to meet normal demand, reducing the need for passengers to stand for the journey
- ◆ Ensure that the road network is used with maximum efficiency with innovative approaches to demand management
- ◆ Safe cycling and walking routes should be identified for commuters and communities

*Promoting a Sustainable Economy*

- ◆ The area needs to develop a stronger presence in higher value services and the knowledge economy
- ◆ Supporting and developing higher and further education.
- ◆ Strategic interventions, focussed on regeneration and investment in the most deprived areas of the region should be along sustainable transport corridors and support key settlements.

*Valuing Our Environment*

- ◆ Getting the best of both high quality urban living and close proximity to stunning countryside
- ◆ Reducing levels of traffic congestion and developing effective public transport
- ◆ Sustaining and developing places that are safe for people to walk and cycle, and for reducing crime

*Respecting Distinctiveness*

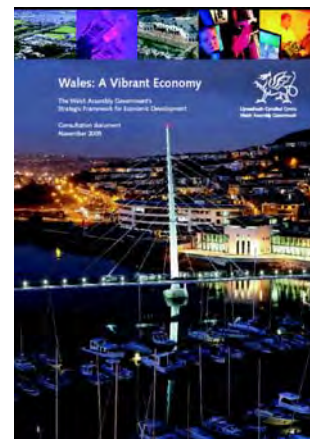
- ◆ Each town needs to foster its own distinct sense of identity, building on its heritage and culture

- ◆ Creating a network of settlements with real character that complement each other and add strength to the attractiveness of the region as a whole

2.14 Outside of Bridgend County Borough but relevant to this study are the affects of two major employment proposals; St. Athan and the proposed International Business Park.

### Wales: A Vibrant Economy

2.15 The Welsh Assembly Government's vision, as set out in *Wales: A Vibrant Economy* is of a vibrant Welsh economy delivering strong and sustainable economic growth by providing opportunities for all.



2.16 The approach for realising this vision is built around Wales' core strengths: an increasingly skilled, innovative and entrepreneurial workforce; an advanced technology and knowledge base; strong communities; a stunning natural environment; and an exceptional quality of life. WAGs growing range of powers, short decision chains, close partnerships, local knowledge and willingness to engage will help build an ever stronger competitive advantage for Wales.

2.17 The key actions for achieving these priorities will be:

- ◆ supporting job creation and helping individuals to tackle barriers to participation in the world of work;
- ◆ investing to regenerate communities and stimulate economic growth across Wales;
- ◆ helping businesses to grow and to increase value-added per job and earnings by:
  - investing in our transport networks and other economic infrastructure;
  - attracting more high value-added functions to Wales and supporting businesses and sectors with strong growth potential, notably through the new *Knowledge Bank for Business*;
  - further improving our skills base and using the opportunities created by the mergers to deliver more demand-led training tailored to the needs of businesses; and
  - helping businesses to become more competitive by supporting other drivers to business growth: entrepreneurship, innovation, investment and trade; and

- ◆ ensuring that all economic programmes and policies support sustainable development, in particular by encouraging clean energy generation and resource efficiency.

### **Property Strategy for Employment in Wales 2004-2008**

2.18 WAG's property strategy for employment sites and buildings was developed in 2004 and is currently being reviewed. This original strategy has the objective to increase economic prosperity. Its aims are to ensure high quality employment sites in the right locations for inward investors and indigenous businesses.

2.19 The Strategy gives priority to high value added sectors:

- ◆ Emerging industries, e.g. biotechnology
- ◆ High-tech manufacturing, e.g. semiconductors
- ◆ High level services, e.g. Headquarters, Research & Development.

But also recognises that other, lower value sectors must not be forgotten:

- ◆ Mainstream manufacturing,
- ◆ Office services, e.g. call centres
- ◆ General services, e.g. distribution
- ◆ Leisure and tourism
- ◆ Processing industries, e.g. oil.

2.20 The strategy acknowledges that much of the demand in Wales is for ready-made, modern buildings; poor performance for key growth sectors could be due to a lack of appropriate premises. Property quality is becoming increasingly important; and a key element is to enable 'trading up' from established companies.

2.21 The ready or early availability for a new or modern building is becoming increasingly critical to investors' requirements as time to market pressures in both the service and manufacturing sectors often rule out the scope for the planning and construction of new buildings. Although purpose-built buildings may follow at a later stage if the initial investment project performs well.

2.22 The Strategy identifies a portfolio of sites for Bridgend, all of which form part of this assessment process. This portfolio was estimated to have contained 327 acres of land and 31401.227 m<sup>2</sup> of building space.



## Regional Policy Context

### South East Wales Development Strategy: Enter the Dragon Economy (February 2005)

2.23 The Strategy identifies a number of key features which are seen to influence the economy of South East Wales, including:

- ◆ High rates of joblessness;
- ◆ Lower GDP per head than other European regions;
- ◆ Higher population densities than the Welsh average;
- ◆ High economic growth in the coastal plain; and
- ◆ Topography often-constraining development potential

SOUTH EAST WALES  
DEVELOPMENT STRATEGY



2.24 Taking these issues into account, the strategy aims to realise its 'economic vision' through:

- ◆ Developing strong links to the high-growth, high-innovation and knowledge economies of Europe;
- ◆ Seeing the emergence of a limited number of key sectors and innovative firms within 10 years of the Spatial Plan;
- ◆ Business services, tourism and manufacturing becoming key sectors of the future;
- ◆ Using the region's university and research establishments to encourage research talent to locate into the region;
- ◆ Improved levels of qualifications among adults; and
- ◆ Cardiff being regarded as a true European capital, with an international reputation and outlook.

### Sewta (South East Wales Transport Alliance) Regional Transport Plan

2.25 The Regional Transport Consortia have been established in Wales following the additional powers conferred on the Welsh Assembly Government under the Transport Wales Act 2006 and the Railways Act 2005. The Transport Wales Act requires WAG to produce a Wales Transport Strategy, and gives it powers to promote regional transport planning and take direct control of local and regional rail services in Wales.

2.26 By working collaboratively with local authorities and other partners, each of these



regional groupings has the remit to prepare a statutory Regional Transport Plan (RTP). The aim of the RTP is to improve regional transport in south east Wales and help deliver the social, economic and environmental objectives of the Wales Spatial Plan and the Wales Transport Strategy.

2.27 The RTP's main priorities tackle the main problems faced by the area, thus setting the direction of the strategy. They are as follows:

- ◆ To improve access between key settlements and sites and improve transport and access beyond their regions, ensuring that communities have access to a good range of employment opportunities;
- ◆ To improve access to services and facilities, particularly by public transport, walking and cycling;
- ◆ To facilitate economic development and promote land use developments which are supported by sustainable transport measures;
- ◆ To achieve modal shift and promote the greater use of more sustainable and healthier modes of transport, including public transport, walking and cycling; To protect the environment by reducing greenhouse gas emissions and other environmental impacts and reduce the impact of transport system on the local street scene and the natural, built and historic environment;
- ◆ To reduce the number and severity of road traffic casualties;
- ◆ To improve interchange within and between modes of transport;
- ◆ To reduce traffic growth and congestion and make better use of the existing road system;
- ◆ To regenerate town centres, brown-field sites and local communities through appropriate transport provision.

2.28 The RTP seeks to address these priorities through a mixture of policies and actions. Policies are listed under the following categories;

- |                       |  |
|-----------------------|--|
| ◆ Planning            | ◆ Integration, Interchange and Information |
| ◆ Walking & Cycling   | ◆ Highway                                  |
| ◆ Smarter Choices     | ◆ Road User Charging                       |
| ◆ Rail                | ◆ Road Safety                              |
| ◆ Bus                 | ◆ Car Parking                              |
| ◆ Community Transport | ◆ Freight                                  |

## Local Policy Context

### Bright Future – A Community Strategy for Bridgend County 2009 – 2012

2.29 Bridgend County's new Community Strategy was published in 2009. The Bridgend Local Service Board (LSB) is co-ordinating strategic action across the County so that agencies work together to realise the vision for Bridgend:

***A bright future that celebrates and builds on the successes of our past and present. Our:***

***Strong Communities  
Young Voices  
Healthy Living  
New Opportunities  
Proud Past  
Green Spaces***



2.30 Relevant commitments within the Community Strategy of particular relevance to employment and employment land and premises include:

#### Strong Communities

- ◆ Develop the support and training available for local businesses, community and voluntary groups
- ◆ Support local voluntary and community groups to be better able to influence local and national policy and strategy

#### Young Voices

- ◆ Increase the range of learning opportunities for all children and young people, including those who find formal learning difficult.
- ◆ Provide the guidance, help and support to enable children and young people to develop the skills they need, and the personal attributes to apply them, to make the best of their talents.

#### Healthy Living

- ◆ Helping employers to improve the health of their staff by promoting healthy lifestyles and making the workplace a safe and healthy place to be.

#### New Opportunities

- ◆ Ensure that help is available for local people currently out of work so that they can get the right skills to be able to find work locally and that companies are confident that they can find local people with the skills they need.
- ◆ Increase the number of contracts given to local companies to provide goods and services to the council and other public sector organisations, making procurement more sustainable.

- ◆ Provide a good range of adult and community learning opportunities for people to study the things that are important to them and to employers.
- ◆ Encourage organisations work together to help all people who find difficulty with reading, writing and using numbers.

### Proud Past

- ◆ Improve our historic town centres and support the improvement of town centre buildings
- ◆ Implement the regeneration proposals for Porthcawl.
- ◆ Develop and support training available for local businesses, community and voluntary groups.

### Green Spaces

- ◆ Work towards a sustainable transport infrastructure which reduces the dependency on the car, recognises the benefits of public and community transport and encourages walking and cycling.
- ◆ Create a rural business centre developing rural skills and encouraging social enterprises.

## **Fit for the Future: Bridgend County Borough's Regeneration Strategy 2008 – 2021**

2.31 *Fit for the Future* defines regeneration as an over-arching activity delivering a balanced approach to revitalising the well-being of communities through social, physical, and economic improvements. The Strategy seeks to promote entrepreneurial and wealth-creating activities: it builds on and integrates economic development and tourism, urban and rural physical regeneration, and health.

2.32 The Strategy also integrates with key values embedded in the Community Strategy. Working alongside other major local strategies, *Fit for the Future* emphasises key actions to prepare for, take and maximise opportunities for local people and businesses, and to attract new investment into the Borough.

2.33 The vision contained in the strategy is:

***“By 2021, Bridgend County Borough will be recognised as a self-contained, productive sub-regional economy, with a skilled and utilised workforce, in a place where people and businesses want to be”***

2.34 The strategic framework contained within the strategy outlines 4 strategic aims:

- ◆ Enabling wealth and increasing enterprise
- ◆ Building up skills levels and entrepreneurial attitudes in an active labour force

- ◆ Making a great place, to live, work, visit and play
- ◆ Strengthening and renewing infrastructure

2.35 Associated with these strategic aims, several relevant operational aims are identified:

- ◆ Increase productivity by prioritizing sectoral growth within the economy as a whole – in particular, raising the share of the knowledge sector
- ◆ Close the enterprise gap, increasing business start-ups and survival rates
- ◆ Attract investment, bringing business and resources to Bridgend CB
- ◆ Make Bridgend CB a great place to work and do business
- ◆ Take forward town centre renewal to modernise and revitalise their function and facilities
- ◆ Ensure a good and appropriate supply of land and property, identifying opportunities for change of use

2.36 Beneath these aims, several key actions have been identified. Relevant actions are as follows:

- ◆ Continue strong existing programme of business support
- ◆ Develop and support Focus Clusters of priority industries to raise quality and performance
- ◆ Take forward ongoing town centre renewal
- ◆ Develop a comprehensive 21<sup>st</sup> Century Sites programme to draw together existing and incoming employment sites, linking supply and demand to service opportunities

### **Bridgend Unitary Development Plan (UDP) 2001 – 2016**

2.37 The Bridgend Unitary Development Plan (UDP), adopted in 2005, expresses the land-use strategy and planning policies for the County Borough up until 2016. The guiding principle of the UDP is:

***“To improve the quality of life for the residents of Bridgend County Borough in ways which are compatible with the principles of sustainable development.”***





2.38 This is implemented by a preferred land use strategy of:

***“Limited dispersal of new development in the main urban areas, wherever possible on redundant or under-utilised urban land and optimising the use of committed development sites.”***

2.39 The aims and objectives of the Plan in relation to employment are:

- ◆ To promote equality and opportunity by providing all residents with the right of access to employment opportunities appropriate to their skills;
- ◆ To promote the use and conversion of existing appropriate brownfield sites and redundant or under-utilised buildings for industrial and commercial development;
- ◆ To ensure that sufficient land is available to meet the job requirements of the population and varying needs of industry, wherever possible close to existing and proposed residential communities;
- ◆ To ensure that an adequate supply of readily developable land is available by the maintenance of a land-bank;
- ◆ To enrich the economy by safeguarding existing employment in terms of sites and opportunities, and securing new investment;
- ◆ To develop the locational advantages of the M4 corridor by reserving sites near the strategic highway network for special employment purposes.

2.40 The UDP allocates 252 Ha of land to satisfy the varying needs of business during the plan period (2001 – 2016). This is done on five types of site:

- ◆ *Key Employment Sites (Policy E2)*  
Land is safeguarded for primarily large-scale investment.
- ◆ *Industrial and Commercial Allocations (Policy E3)*  
Land is allocated for general industrial and commercial developments
- ◆ *Small Business Allocations (Policy E4)*  
Land is allocated for small business
- ◆ *Special Employment Sites (Policy E6)*  
Land allocated and safeguarded for high quality special employment: high technology businesses and manufacturing; and research and development
- ◆ *Office Development (Policy E10)*  
Land is allocated for B1 office developments

It is the above sites allocated in the adopted Development Plan which form part of the review of sites undertaken in this assessment report.

### Robert Chapman and Company Report

2.41 In 2006, Robert Chapman and Company were commissioned by Bridgend County Borough Council to review the availability of employment land and premises in the County Borough and, following an assessment of supply and demand to recommend the level of provision which should be provided over the LDP period to 2021. This study built on previous reports used to inform the adopted Unitary Development Plan.

2.42 The conclusion of the report is:

***“Combined ‘short-term’ land and ‘immediately available’ land within BCBC’s allocated employment land availability register gives 137.61 hectares: a supply of 19.4 – 24.4 years respectively. This takes Bridgend beyond the 2021 local development plan period. Whilst private sector activity should be encouraged and welcomed, the public sector has an important role in bringing forward land for development especially as a large proportion of it is owned by WAG and BCBC”***

### Bridgend Local Development Plan (LDP) 2006 – 2021 Pre Deposit Proposals

2.43 The Bridgend Local Development (LDP) is currently being prepared by the County Borough Council and will supersede the UDP upon adoption.

2.44 The Council has already prepared Pre-Deposit Proposals for the LDP which includes a draft Vision, Objectives, Growth and Spatial Option and Strategic Policies. These were consulted on in early 2009 and a deposit LDP is expected to be published for consultation in summer / autumn of 2010.

2.45 The draft vision of the LDP is:

***“By 2021, Bridgend County Borough will be transformed to become a sustainable, safe, healthy and inclusive network of communities comprising strong, interdependent and connected settlements with improved quality of life and opportunities for all people living, working, visiting and relaxing in the area.***

***The catalysts for this transformation will be:***



- ◆ **a successful regional employment, commercial and service centre in Bridgend;**
- ◆ **a vibrant waterfront and tourist destination in Porthcawl;**
- ◆ **a revitalised Maesteg; and**
- ◆ **thriving Valley communities.”**

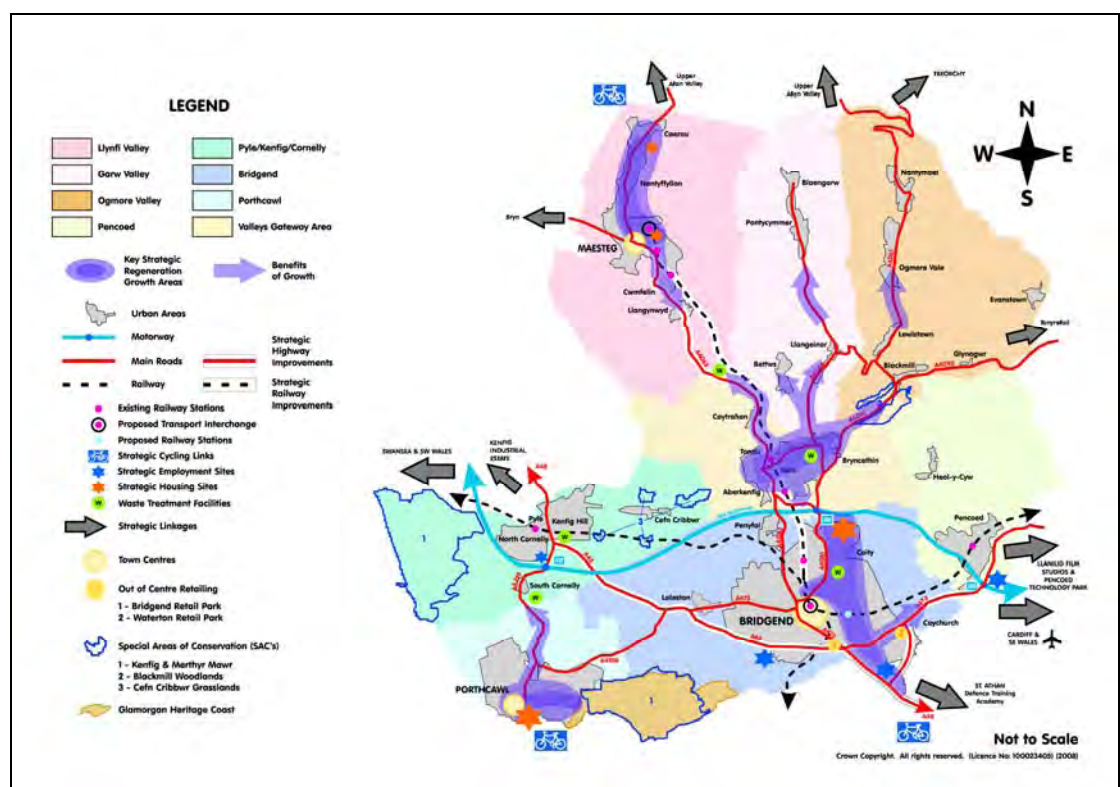
2.46 The objectives of the Plan centre around four high-level strategic objectives of:

- To produce high quality sustainable places where people want to live
- To protect and enhance the environment
- To spread prosperity and opportunity through regeneration
- To create safe, healthy and inclusive communities

2.47 The preferred spatial strategy of the Plan is to allocate areas for development based upon the regeneration priorities of the County Borough.

2.48 To this end, four Strategic Regeneration Growth Areas (SRGAs) have been identified which will deliver the majority of major development up to 2021.

**Figure 2.2 Bridgend Local Development Plan Strategic Diagram**



2.49 In addition to the over-arching strategic objectives, several objectives relate specifically to employment:

- ◆ To promote Bridgend as a regional hub and the key principal settlement of the County Borough where major employment, commercial and residential development is focused. (OBJ 1a)
- ◆ To support integrated transport solutions and measures that will encourage modal shift to more sustainable forms of transport for people and freight (OBJ 1f)
- ◆ To build a more diverse, dynamic and self reliant economy and business environment which will allow it to reach its potential (OBJ 3a)
- ◆ To provide a realistic level and variety of employment land to facilitate the delivery of high quality workplaces and job opportunities (OBJ 3b)
- ◆ To bring the benefits of regeneration to the valley communities by directing new development to those areas at a scale which acknowledges their geographical constraints and infrastructure capacity. (OBJ 3c)
- ◆ To enable Bridgend Town to become an attractive and successful sub regional and commercial destination which meets the needs of its catchment. (OBJ 3e)
- ◆ To support realistic and viable town and district centres in the County Borough which are attractive and economically successful. (OBJ 3f)
- ◆ To provide a land use framework that recognises the needs of deprived areas within the County Borough, and which affords those communities the opportunities to tackle the sources of their deprivation.

2.50 Policy SP10 of the Pre Deposit Proposals seeks to create the right conditions for economic prosperity by providing an appropriate supply and type of employment land to meeting the varying requirements of business. (See Figure 2.3)

**Figure 2.3 Bridgend LDP Pre Deposit Proposals Strategic Policy 10**

**SP 10**  
**Employment and the Economy**

**LDP Objectives:** 1a, 1b, 1d, 3, 3a, 3b, 3c, 4a

**In order to meet the varying requirements of business, and to provide access to employment and training for all residents, a range and choice of sites will be retained and protected for employment (B1, B2 and B8 uses) purposes.**

**The following strategic sites are allocated for employment purposes;**

- Brocastle, Waterton, Bridgend;
- Island farm, Bridgend;
- Pencoed Technology Park;
- Ty Draw Farm, North Cornelly;

2.51 The supporting text of the Pre Deposit Proposals states:

**“The Preferred Strategy retains between 160 -170 hectares of the committed” employment land including those sites identified as 21st Century Employment Sites by the Council’s Regeneration Strategy to ensure a choice and range of sites are available. This identified employment land forms the “backbone” to the local economy, offering a range of sites and premises for the whole spectrum of B class uses, sui generis uses, and waste facilities that require an industrial location. This will facilitate transition of the local economy to attract higher value-added knowledge intensive employment uses, but at the same time maintain a significant manufacturing base that remains an important facet of the local economy, now and in the future.”**

2.52 Table 9.2 of the Pre Deposit Proposals also gave an indication of the employment sites in the County Borough that were likely to be retained or reassessed for inclusion within the deposit LDP. Whilst at the time of publication of the Pre Deposit, and with the evidence available, this was considered to be the most up-to-date information on the sites, this situation has changed for several reasons:

1. The original Bridgend Employment Land Review undertaken by Robert Chapman Associates which formed the evidence base for many of the employment issues, objectives and policies in the plan is now 4 years old and does not reflect current market conditions.
2. The effects of the economic downturn and the decline in manufacturing generally have continued to have an impact on the employment market, land and premises in Bridgend County Borough.
3. During consultation on the Pre Deposit Proposals it became apparent that there was incompatibility between the change in economic participation (+1,283) which the LDP Trend Based Growth option predicts, and the Economic Forecasts for Bridgend County Borough (+3,846) predicted in table 7.1 of the document. This was due to separate data sources. Further work was therefore commissioned by Cambridge Econometrics to streamline the data sources and examine these relationships, particularly in light of the current economic situation, and the role of Bridgend as a sub regional employment centre serving a wider catchment. This work has been undertaken to ensure that the figures in the Deposit LDP are realistic and viable.

2.53 It is therefore considered essential that this assessment of employment land should be carried out between the pre deposit proposals and deposit Plan to take into account those issues raised above to ensure that the Bridgend LDP is based on the most up-to-date and relevant information; and that any decisions on the rationalisation / provision of future employment land can be undertaken in light of the LDP Strategy.



**Issues / Messages to take forward**

- 2.54 From this review of national, regional and local policies and strategies, it is clear that Bridgend County Borough needs a strong, varied and flexible portfolio of employment sites if it is to meet the needs of the County Borough throughout the Local Development Plan period up to 2021.
- 2.55 National planning policy states that Development Plans can cater for non identified need as well as that which is provided by forecasts. Local Authorities should therefore allocate sites having regard to the need for flexibility as well as offering a range of choice of sites in sustainable locations which meet the needs of the market as well as enabling policy-led developments to occur. However this needs to be balanced against the need for realism in allocating sites and consideration should be given to alternative uses for sites which have remained allocated, but undeveloped, for a long period of time.
- 2.56 The general thrust of spatial policy in terms of employment as identified in the Wales Spatial Plan and the emerging Bridgend LDP is to build upon the economic success of the M4 corridor area, whilst also seeking to actively encourage new development in the northern valley areas to regenerate communities. This may require a strong public sector role in bringing sites forward in Bridgend and using 'strategic intervention' as highlighted in Bridgend's Regeneration Strategy to bring key sites forward for development.
- 2.57 It is also clear from this review that employment land and sites need to be responsive to the needs of modern business and investment practices and be in the right location as well as being ready to develop or occupy at short notice.

### 3. Economic and Business Profile of the County Borough

- 3.1 In order to fully appreciate the markets within which the employment land and premises assessment should take place, it is important to first take account of the nature of the labour and business markets in Bridgend County Borough.
- 3.2 This profile should not only examine the nature and availability of the workforce of the area, but should also look at the distribution of employment. Whilst the LDP Strategy will seek to direct new developments to certain areas of the County Borough (a policy-led approach), it is also important to ensure sufficient land is provided close to existing concentrations of businesses where companies would want to locate (market-led approach).

#### Population and Demography

- 3.3 Bridgend County Borough had a population of 128,645 at the 2001 Census. The latest Registrar General's Mid –Year Estimate shows that this had risen to approximately 133,900 people in 2008. This is a rise of 4.1% which is slightly below the Wales figure of 5.3%.
- 3.4 Table 3.1 shows the breakdown of population between the sub-areas of the County Borough.

**Table 3.1 Population Distribution by Sub Area**

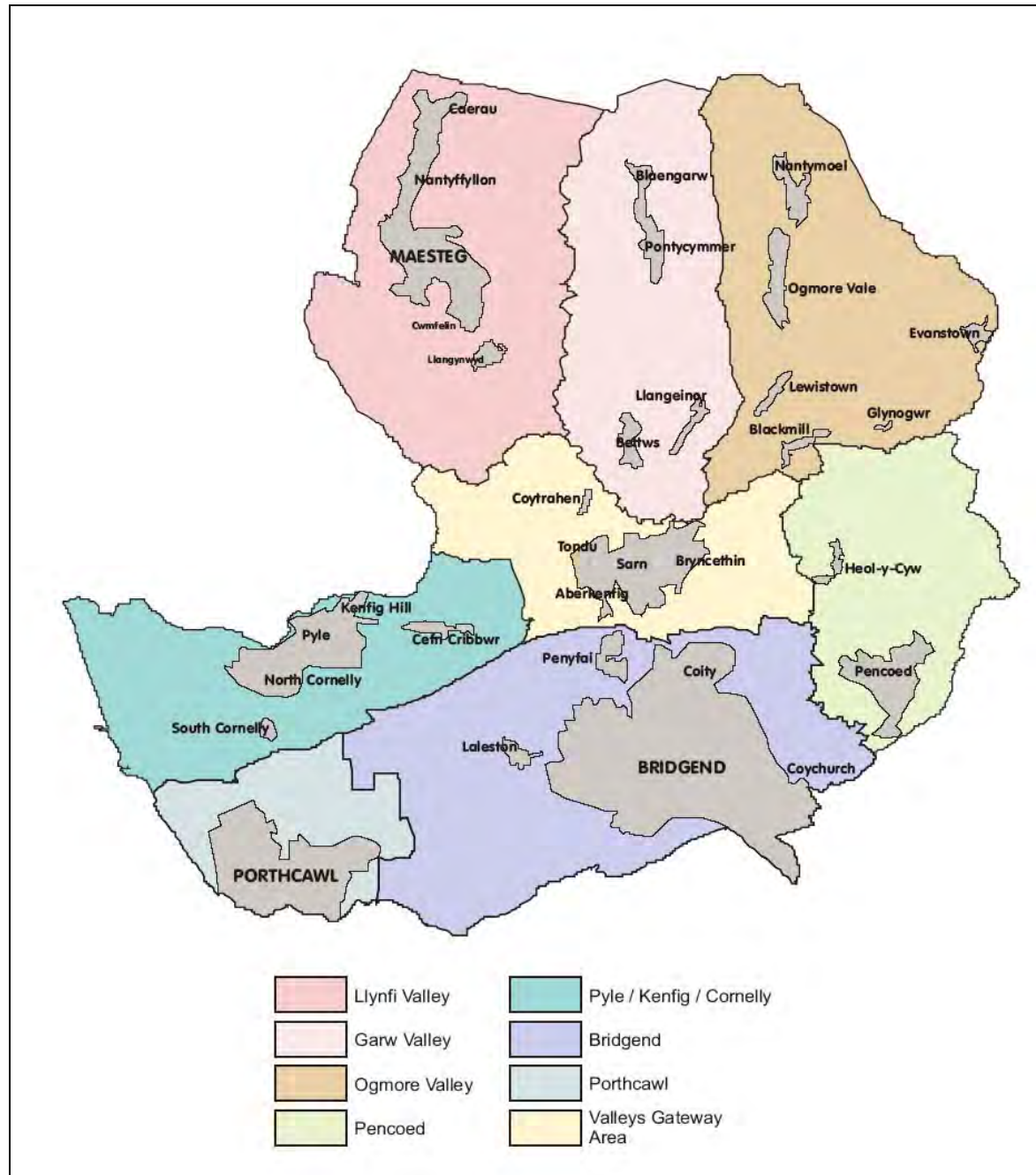
Source: Bridgend County Borough Council

Sub Area	Proportion ( % )
Bridgend	33
Porthcawl	12
Llynfi Valley	16
Pencoed	7
Valleys Gateway	8
Pyle / Kenfig / Cornelly	12
Ogmore Valley	6
Garw Valley	6

- 3.5 A plan illustrating the extent of the sub areas is shown in Figure 3.1.
- 3.6 As Table 3.1 demonstrates, the majority of the existing population of the County Borough lies within 3 major towns, Bridgend, Porthcawl and Maesteg (Llynfi Valley) which together account for 61% of the total. Another significant area of population is located around the settlements of Pyle, Kenfig Hill and North Cornelly centred on junction 37 of the M4. The function and role of these settlements is discussed in a separate report to feed into the LDP.
- 3.7 Table 3.2 describes the economic profile of the population of Bridgend. In terms of economically active people it can be seen that Bridgend has

slightly less as a % of the population than Great Britain as a whole. This is reflected in other data which indicates a higher than average number of people with a limiting long term illness (25% in 2001).

**Figure 3.1 Sub Areas of Bridgend**



**Table 3.2 Employment and Unemployment in Bridgend (July 2008 – June 2009)**

Source: ONS annual population survey

	<b>Bridgend (numbers)</b>	<b>Bridgend (%)</b>	<b>Wales (%)</b>	<b>Great Britain (%)</b>
<b>All people</b>				
Economically active <sup>†</sup>	63,400	76.4	75.4	78.9
In employment <sup>†</sup>	57,800	69.4	69.4	73.3
Employees <sup>†</sup>	53,100	64.1	60.2	63.9
Self employed <sup>†</sup>	4,100	4.7	8.7	9.1
Unemployed (model-based) <sup>§</sup>	5,300	8.4	7.7	6.9
<b>Males</b>				
Economically active <sup>†</sup>	33,800	78.8	78.6	83.3
In employment <sup>†</sup>	30,200	70.2	71.4	77.0
Employees <sup>†</sup>	26,900	63.1	58.5	63.9
Self employed <sup>†</sup>	3,000	6.4	12.3	12.6
Unemployed <sup>§</sup>	3,600	10.8	9.0	7.5
<b>Females</b>				
Economically active <sup>†</sup>	29,600	73.7	71.8	74.1
In employment <sup>†</sup>	27,600	68.4	67.2	69.4
Employees <sup>†</sup>	26,100	65.2	62.0	63.8
Self employed <sup>†</sup>	1,100	2.7	4.7	5.2
Unemployed <sup>§</sup>	2,000	6.8	6.1	6.1

†numbers are for those aged 16 and over, % are for those of working age (16-59/64)

§numbers and % are for those aged 16 and over. % is a proportion of economically active

3.8 The data also indicates the under representation of self employed persons among the workforce. This is reflected elsewhere and indicates a lack of innovation amongst the population. Whilst this is being addressed by initiatives being taken forward by the Bridgend Regeneration Strategy, it also has implications for the need to provide small, starter-type units through the planning system on employment land.

**Table 3.3 Employment by Occupation**

Source: Annual Population Survey, year ending June 2009

<b>Occupation</b>	<b>Bridgend</b>	<b>Wales</b>	<b>Great Britain</b>
Managers and senior officials	13.9	12.9	15.6
Professional occupations	11.2	12.0	13.4
Associate professional & technical	14.9	13.7	14.7
Administrative & secretarial	8.9	11.0	11.3
Skilled trades occupation	11.2	12.5	10.6
Personal Service Occupations	10.3	9.1	8.4
Sales and customer service	8.2	7.9	7.5
Process plant & machine operatives	9.9	8.0	6.9
Elementary occupations	11.0	12.5	11.3

- 3.9 In terms of occupations, Bridgend County Boroughs working population is broadly typical of the Welsh and British averages. However two key differences emerge: firstly there is slightly less managerial and professional persons living in Bridgend than the rest of the country and secondly the proportion of skilled trade, personal service and process plant and machine operatives is higher than the national averages. The latter reflects Bridgend's tradition of being a strong manufacturing centre and its emerging role as a sub-regional service centre. The former could be due to Bridgend's position in the regional settlement hierarchy with perhaps a tendency for people who work in the high order professions / managerial positions to live closer to the major cities (particularly Cardiff) where these jobs are located.
- 3.10 These statistics and comments are valid when one examines the jobs located in the County Borough by sector (see Table 3.3). This shows the existing strong manufacturing base of the area, despite recent job losses in the sector, in terms of a comparison with Wales and Great Britain. It also shows the mismatch between the Banking, Finance, Insurance and other service sectors which are under-represented in the County Borough, but also the reliance on the public sector for employment which is higher than both the Wales and British averages.

**Table 3.4 – Industrial Employment by Sector**

Source: Annual Population Survey, 2008

SIC 92	% job		
	Bridgend	Wales	Great Britain
Manufacturing	17.5	13.7	10.2
Construction	5.7	5.2	4.8
Distribution, Hotels & Restaurants	20.8	23.0	23.4
Transport & Communications	3.1	4.3	5.8
Banking, Finance & Insurance, etc	15.2	14.1	22.0
Public Administration, Education & Health	33.6	32.9	27.0
Other Services	3.7	4.8	5.3

### Business Size and Quantity

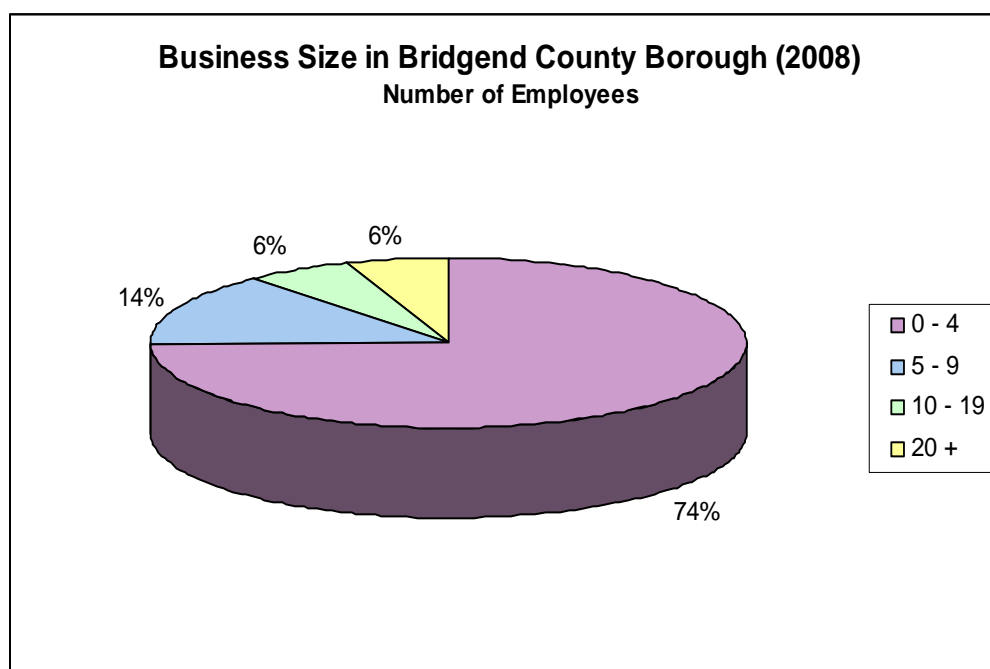
- 3.11 At the end of 2007 there were 3,025 businesses registered for VAT in Bridgend County Borough. However this statistic does not cover national companies who may be registered for tax purposes elsewhere, nor does it pick up very small businesses operating below the minimum threshold for VAT. This figure also includes businesses operating in sectors which are not relevant to this study, i.e. retailers etc. A separate data set indicates that there were 4,300 units registered for VAT and PAYE in Bridgend County Borough in 2008, this rose to 4,360 in 2009.
- 3.12 Business demography data from the Office for National Statistics indicates that there were 3,725 'enterprises' in 2008 operating in

Bridgend County Borough. This had risen from 3,470 in 2004 with a peak at 3,745 in 2007.

- 3.13 An examination of the size of businesses in the County Borough is illustrated in Figure 3.1. This shows that the majority of enterprises are micro (defined as up to nine employees). This is reflective of the national picture which shows similar proportions of very small businesses, with 89% employing below 10 employees.

### Figure 3.1 Business Size

Source: Business Demography – Office for National Statistics



### Location of Jobs and Businesses

- 3.14 In assessing the distribution of employment in the County Borough data can be obtained by the total number of jobs in an area and by the total number of businesses. Total number of jobs in the County Borough was approximately 56,100 in 2008.

### Table 3.5 Distribution of Businesses by Sub Area (2009)

Source: ONS

Sub Area	Distribution %
Bridgend	42
Porthcawl	13
Llynfi Valley	10
Pencoed	8
Valleys Gateway	10
Pyle / Kenfig / Cornelly	11
Ogmore Valley	3
Garw Valley	3



- 3.15 In terms of both business (Table 3.5) and jobs (Table 3.6) it is clear that the majority of employment is focused upon Bridgend town. This is not surprising given that it is the largest settlement and its historical role as a service and employment hub. Given this overwhelming levels of employment in the town (compared to other parts of the County Borough) this is likely to continue into the future as the town is seen as an attractive place for business to locate, given the existing employment base and the availability of skilled labour.

**Table 3.6 Distribution of Jobs by Sub Area (2007)**

Source: ONS

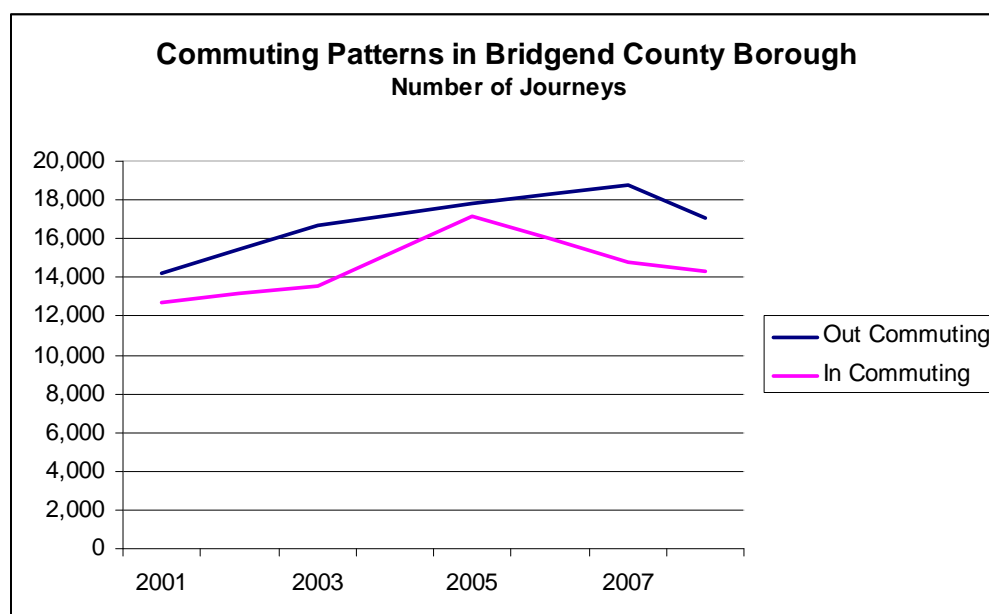
Sub Area	Distribution %
Bridgend	62
Porthcawl	7
Llynfi Valley	7
Pencoed	6
Valleys Gateway	7
Pyle / Kenfig / Cornelly	8
Ogmore Valley	2
Garw Valley	2

### Commuting Patterns

- 3.16 In terms of commuting patterns, the 2004 Annual Population Survey indicates that 71% of County Borough's residents worked in the area, which is the same as the Welsh average. 17,300 people commute out of the Authority to work and 14,200 commute in. There is therefore a net outflow of 3000. The most dominant areas for out-commuting are Cardiff at 4000, Rhondda Cynon Taf at 3000, and Neath Port Talbot at 3000. In terms of the origin of those working in the Authority, there is significant in-commuting from Rhondda Cynon Taf at 4000, and Neath Port Talbot at 3000.

**Figure 3.2 Commuting Patterns**

Source: Annual Local Labour Force Survey / WAG



- 3.17 In-commuting levels are almost at the same level as out commuting and in 2005 there was a difference of just 600 trips. The difference has now increased again; however, the statistics still indicate that only approximately 30% of all employed persons, living in the County Borough need to commute outside of the administrative area. A comparable figure for the Vale of Glamorgan in 2005 was 50%. The 2008 net figure is 2,800 out commuting trips, just 5% of the working population. These figures also disguise the fact that there are major employment sites immediately adjacent to the County Borough in Rhondda Cynon Taf (RCT) and Neath Port Talbot (NPT) where significant numbers of people (1,565 trips to Margam and Brynna wards in NPT and RCT respectively in 2001) commute to. This represents significant self containment.

### **Bridgend Business Profile**

- 3.18 The global economic downturn has presented a particularly challenging time for business throughout Wales. But Bridgend County Borough Council is working closely with partner organisations to offer help and support, and encourage fresh investment. The council's Economic Development and Regeneration teams are concentrating their efforts on supporting local businesses and promoting Bridgend County Borough to potential developers and employers.
- 3.19 In terms of financial support, nowhere in Britain receives as much business investment assistance than the Valleys and West Wales Convergence areas in which the County Borough is located. Such levels of support are not available over in England, nor in neighbouring areas such as Cardiff, Newport, Monmouthshire or the Vale of Glamorgan.
- 3.20 Bridgend County Borough also benefits from excellent communications and links – the M4 has three interchanges in the county borough, and the main rail link to London runs through the area. A number of key employment sites take advantage of this, such as the Ortho-Clinical Diagnostics factory located near junction 35 on the borders of Bridgend County Borough, part of the Johnson and Johnson group which is set to employ 400 people in highly skilled jobs.
- 3.21 The County Borough has a long history in attracting major multi-national names as Ford, Sony, Rockwool and Lloyds TSB. Biotec Services International were recently awarded the Queen's Award for enterprise in international trade and BBI Healthcare has recently located to the area to produce a unique range of diabetic products.
- 3.22 Bridgend is also well placed to benefit from huge investments planned for nearby St Athan over the next few years, with TES Aviation already one of the first businesses to move to the area. In addition to boasting numerous quality manufacturing businesses, there has also been a significant growth in service sector employers, such as Lloyds TSB,

Logica CMG, John Raymond Transport, McArthur Glen as well as large retailers such as Dunelm Mill and housing associations.

- 3.23 As part of the South East Wales Economic Forum, Bridgend is actively engaged in promoting the area to UK and overseas markets through a marketing, promotion and inward investment campaign under the 'Capital Wales' brand. Working in partnership with other local authorities in South East Wales, this combined campaign has an excellent record of attracting inward investment.
- 3.24 The Council's Economic Development team also works closely with the Welsh Assembly Government to take advantage of global markets and offers expert advice and support to businesses about exporting and trading overseas, through the efforts of International Business Wales. The Bridgend Business Forum, a 170-member strong organisation has also recently been established within the borough, which acts as a conduit for useful information on a variety of topics pertinent to the business community such as funding and property availability, government initiatives and international trade.
- 3.25 Elsewhere, small to medium sized businesses are benefitting from a new financial support scheme, the Local Investment Fund, which has simplified ways of gaining access to funding. A skills strategy is making sure that local workers possess the types of skills that businesses are looking for, and training initiatives for 14-16 year olds have been set up alongside specialist skill centres. A new construction facility is also preparing to open at Bridgend College.
- 3.26 Small and medium sized businesses (SMEs) are being advised about ways they can save money through sustainable schemes such as SMART metering, and valley communities are being targeted through projects like the Welsh Assembly Government's strategic regeneration area initiative, which targets resources at people and places as well as physical regeneration.
- 3.27 The area also benefits from a wide selection of quality housing, excellent facilities and beautiful scenery ranging from three valley areas to the coastal resort of Porthcawl, making the County Borough a first rate place in which to live, visit and enjoy life.

**Issues / Messages to take forward**

- 3.28 The above statistics indicate the Bridgend County Borough and its immediate surroundings are relatively self-contained in terms of its employment market.
- 3.29 The County Borough has an average work force in terms of employment type however the number of self employed persons is well below the national average. The County Borough relies on the public sector to provide a third of all jobs compared to just over a quarter in the British average, reliance on Manufacturing is also high.
- 3.30 The overwhelming majority of jobs and businesses are located in the town of Bridgend. Whilst this enhances the role of the town as the economic hub of the County Borough, it highlights the issue that other areas of the County Borough are potentially under-provided for in terms of jobs. This encourages commuting within the County Borough and does not promote sustainable communities. The biggest disparities appear to occur in the three valley areas however the extent to which this issue can be addressed is limited due to the availability of appropriate located sites in these topographically restrictive areas. Every encouragement, however, can be made to promote acceptable small scale employment generating uses within urban areas (on unallocated sites), as per national planning policy guidance.
- 3.31 The Business Profile of the County Borough is also positive with plenty of assistance available from the County Borough Council and other agencies with a wide variety of support mechanisms in place, combined with an attractive area within which to work. This profile will be examined in more detail in later chapters as well as considering if the employment land and stock of the County Borough is sufficient in terms of quantity and quality to meet business need.

#### 4. Current Employment Land in Bridgend County Borough and Initial Assessment

- 4.1 The current recognised employment land portfolio of Bridgend County Borough is taken from the sites identified by policies E2, E3, E4, E6 and E10 of the adopted Bridgend Unitary Development Plan (see above).
- 4.2 The starting point for assessing the supply side of an assessment is the Council's employment land schedule for 2009 (see table 4.3 below).
- 4.3 Table 4.3 gives the name of each site, its size, the amount of vacant land within the allocation as at October 2009. The last four columns give an assessment of when the site is likely to be capable of being delivered given any infrastructural constraints which may be prevalent on site. The definitions comprise of the following:

<b>Immediate:</b>	Available for development immediately
<b>Short:</b>	Likely to be available for development within the next 12 months
<b>Medium:</b>	Likely to be available for development within 1 – 3 years
<b>Long:</b>	Not likely to be available until 3+ years

This schedule and the definitions are updated on an annual basis and the 'availability' areas are agreed between the planning and economic development departments of the Council prior to publication.

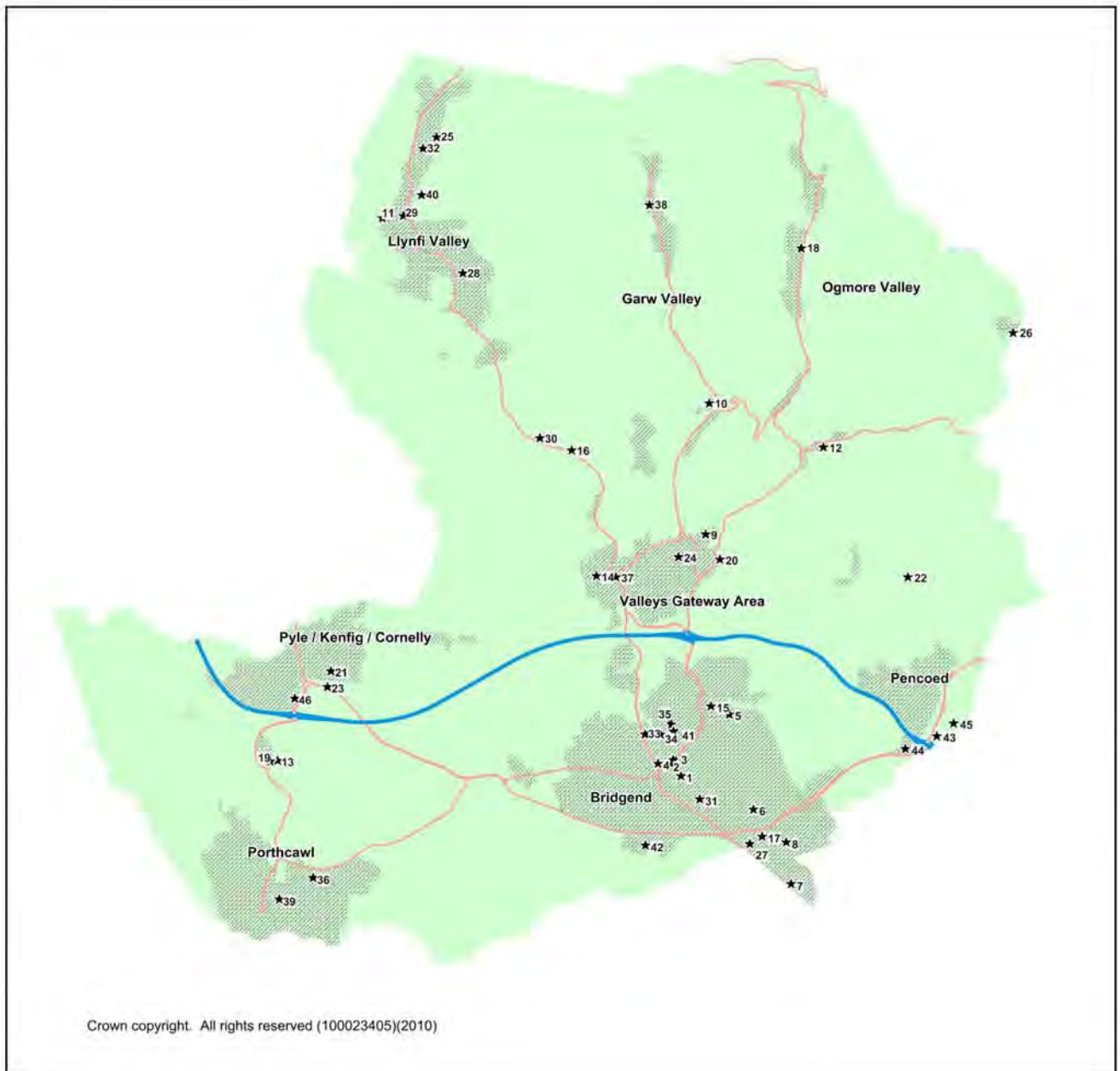
- 4.4 The rest of this section examines the current situation regarding employment land supply in Bridgend County Borough leading to an initial review of sites to be considered as part of this study for employment purposes. Data has been derived based on the first employment land and premises survey undertaken by the Council's Development Planning section in 2009.

#### Employment Sites

- 4.5 The County Borough's current portfolio of employment sites consists of 47 areas covering over 730 hectares of land (see Table 4.2 below). In 2009 there was over 1,114,836 square metres of development floorspace located on these sites (see Table 4.1). Almost half of all this floorspace is categorised as having a B2 use which, not surprisingly, consists of the larger manufacturing processes that require more land and space to operate.
- 4.6 Table 4.2 displays these figures by LDP Sub Area. What is clear from this table, and is documented elsewhere in policy, is the concentration of employment development in the Bridgend sub area. This is reflective of Bridgend's position as a sub regional centre in the regional settlement hierarchy as outlined in the Wales Spatial Plan, which focuses on its role as a hub settlement. This table also demonstrates that the shortage of employment development currently allocated in

### Figure 4.1 Existing Employment Sites in Bridgend County Borough

Source: Bridgend County Borough Council



#### KEY

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>1 Tremains Road (former Swalec Depot), Bridgend</li> <li>2 Mackworth Street (land south of), Bridgend</li> <li>3 Coity Road (land at), Bridgend</li> <li>4 The Courage Depot, Off Tondy Road, Bridgend</li> <li>5 Brackla Industrial Estate (B1, B2, B8)</li> <li>6 Bridgend Industrial Estate (B1, B2, B8)</li> <li>7 Brocastle (land east of A48), Waterton, Bridgend (B1, B2, B8)</li> <li>8 Waterton Industrial Estate, Brynmenyn (B1, B2, B8)</li> <li>9 Abergarw Industrial Estate, Brynmenyn (B1, B2, B8)</li> <li>10 Greenmeadow, Llangeinor (B1, B2, B8)</li> <li>11 Heol Ty Gwyn Industrial Estate, Maesteg (brownfield site) (B1, B2, B8)</li> <li>12 Isfryn Industrial Estate, Blackmill (brownfield site) (B1)</li> <li>13 Heol y Splott, South Cornelly (brownfield site) (B1, B2, B8)</li> <li>14 Land at Tondy (brownfield site) (B1, B2, B8)</li> <li>15 Litchard Industrial Estate (B1, B2, B8)</li> <li>16 Llynfi Power Station Site (brownfield site) (B1, B2)</li> <li>17 Mid Glamorgan Depot, Waterton, Bridgend (brownfield site) (B1, B2, B8)</li> <li>18 Penllwyngwent Industrial Estate, Ogmore Vale (brownfield site) (B1, B2)</li> <li>19 South Cornelly Industrial Estate (B1, B2, B8)</li> <li>20 Bryncethin Depot (brownfield site) (B1)</li> <li>21 Village Farm Industrial Estate, Pyle (B1, B2, B8)</li> <li>22 Wern Tarw (B1, B2, B8)</li> <li>23 Former Bairdwear Factory, Pyle (B1, B2)</li> </ul> | <ul style="list-style-type: none"> <li>24 Brynmenyn Industrial Estate (B1, B2, B8)</li> <li>25 Coegnant, Maesteg (brownfield site) (B1, B2, B8)</li> <li>26 Coronation Works, Evanstown (B1, B2, B8)</li> <li>27 Ewenny Industrial Estate, Waterton, Bridgend (B1, B2, B8)</li> <li>28 Ewenny Road Industrial Estate, Maesteg (B1, B2, B8)</li> <li>29 Forge Industrial Estate, Maesteg (B1, B2, B8)</li> <li>30 Georgia Pacific, Llanguywyd (B1, B2, B8)</li> <li>31 Coychurch Yard, Bridgend (B1, B2, B8)</li> <li>32 Speller Industrial Estate, Maesteg (B1, B2, B8)</li> <li>33 Trews Field Industrial Estate, Bridgend (B1, B2, B8)</li> <li>34 Crosby Yard Industrial Estate, Bridgend (B1, B2, B8)</li> <li>35 Coity Road Sidings, Bridgend (subject to an approved planning brief) (B1, B2, B8)</li> <li>36 Pwll y Waun, Porthcawl (B1)</li> <li>37 Enterprise Centre, Tondy (B1, B2, B8)</li> <li>38 Ffaldau Industrial Estate, Pontycymmer (B1, B2, B8)</li> <li>39 Glan Road, Porthcawl (B1, B2, B8)</li> <li>40 Maesteg Washery Site (B1)</li> <li>41 Penybont Industrial Estate, Bridgend (B1, B2, B8)</li> <li>42 Bridgend Science Park/Island Farm</li> <li>43 Land south west of Sony, Pencoed</li> <li>44 The Triangle Site, Pencoed</li> <li>45 Pencoed Technology Park</li> <li>46 Ty Draw Farm, North Cornelly</li> </ul> |
|--|---|



**Table 4.1 Employment Sites in Bridgend County Borough (in sq m) - October 2009**

Source: Bridgend County Borough Council

UDP Policy No.	Employment Site	B1	B2	B8	Sui Generis	Other	Vacant	Total
E3(1)	Abergarw Industrial Estate	1,670	2,320	2,730	670	700	750	8,840
E3(22)	Bairdwear Factory, Pyle	-	2,250	-	-	-	-	2,250
E2(1)	Brackla Industrial Estate	1,930	34,239	15,879	1,670	2,300	21,149	77,167
E2(2)	Bridgend Industrial Estate	36,879	93,547	64,958	15,469	11,110	46,878	268,841
E6(1)	Bridgend Science Park	7,180	2,630	-	-	-	-	9,810
E2(3)	Brocastle Waterton	-	-	-	-	1,700	-	1,700
E3(2)	Bryncethin Depot	1,680	-	1,080	-	-	-	2,760
E3(3)	Brynmenyn Industrial Estate	9,480	18,099	6,490	5,250	740	8,140	48,198
E3(4)	Coegnant Maesteg	-	-	-	-	-	-	-
E4(3)	Coity Sidings Bridgend	-	-	-	1,030	-	-	1,030
E10(3)	Coity Road, Bridgend	-	-	-	-	-	-	-
E3(5)	Coronation Works Evanstown	-	-	-	-	-	1,380	1,380
E4(1)	Coychurch Yard Bridgend	330	2,310	370	1,030	-	-	4,040
E4(2)	Crosby Yard Bridgend	2,490	910	720	-	-	480	4,600
E4(5)	Enterprise Centre Tondy	2,830	700	680	50	40	140	4,440
E3(6)	Ewenny Industrial Estate	1,510	830	480	1,340	-	2,550	6,710
E3(7)	Ewenny Road Maesteg	-	-	-	-	-	40,049	40,049
E4(6)	Ffaldau Industrial Estate	290	3,640	260	-	-	160	4,350
E3(8)	Forge Industrial Estate	360	13,399	750	-	-	-	14,509
E10(4)	Ravens Court, Tondy Rd	1,510	-	-	-	-	-	1,510
E3(9)	Georgia Pacific	-	47,748	-	-	-	-	47,748
E4(7)	Glan Road Porthcawl	250	240	100	80	-	-	670
E3(10)	Green Meadow Llangeinor	11,120	-	-	-	-	-	11,120
E3(11)	Heol Ty Gwyn Maesteg	1,610	4,280	880	380	-	1,010	8,160
E3(12)	Isfryn Industrial Estate	-	11,630	-	-	-	-	11,630
E6(1)	Island Farm Bridgend	-	-	-	-	-	-	-
E3(13)	Land at Heol y Splott	-	-	-	-	-	-	-
E3(14)	Land at Tondy	-	-	-	-	-	-	-
E6(2)	Land S.W.of Sony Technology Pk.	3,840	-	-	-	-	-	3,840
E3(15)	Litchard Industrial Estate	-	3,780	1,880	1,780	-	9,020	16,460
E3(16)	Llynfi Power Station	-	-	-	-	-	-	-
E10(2)	Mackworth Road, Bridgend	1,680	-	-	-	-	-	1,680
E4(8)	Maesteg Washery Site	-	-	-	-	-	-	-
E3(17)	Mid Glamorgan Depot Waterton	10,390	-	-	2,740	-	-	13,130
E6(3)	The Triangle Site Pencoed	5,070	-	-	1,930	-	1,840	8,840
E6(4)	Pencoed Technology Park	35,009	2,440	-	-	-	16,339	53,788
E3(18)	Penllwyngwent Ogmere Vale	650	1,290	10,510	1,430	-	3,350	17,230
E4(9)	Penybont Industrial Estate	-	740	1,000	-	-	660	2,400
E3(19)	South Cornelly	320	6,150	500	520	440	-	7,930
E4(10)	Spelter Maesteg	1,470	3,360	410	-	-	390	5,630
E10(1)	SWALEC Depot, Tremains Road	1,540	-	-	-	-	-	1,540
E4(11)	Trews Field Bridgend	-	540	8,200	3,650	-	350	12,740
E6(5)	Ty Draw Farm, Pyle	-	-	-	-	-	-	-
E3(20)	Village Farm Industrial Estate Pyle	10,950	37,819	14,149	2,490	7,980	6,790	80,178
E2(4)	Waterton Industrial Estate	31,019	248,802	54,388	2,710	-	2,340	339,259
E3(21)	Wern Tarw	-	29,720	-	-	-	-	29,720
E4(4)	Pwll y Waun	-	-	-	-	-	-	-
	<b>Totals</b>	<b>183,057</b>	<b>573,413</b>	<b>186,414</b>	<b>44,219</b>	<b>25,010</b>	<b>163,765</b>	<b>1,175,871</b>

**Table 4.2 Employment Development by LDP Sub Area (in sq m) - October 2009**

Source: Bridgend County Borough Council

	<b>B1</b>	<b>B2</b>	<b>B8</b>	<b>Sui Generis</b>	<b>Other</b>	<b>Vacant</b>	<b>Total Floorspace</b>	<b>% Floorspace</b>
<b>Bridgend</b>	96,457	388,327	148,905	30,389	15,110	83,427	<b>762,615</b>	64.9
<b>Garw Valley</b>	11,410	3,640	260	-	-	160	<b>15,470</b>	1.3
<b>Llynfi Valley</b>	3,440	68,788	2,040	380	-	41,449	<b>116,097</b>	9.9
<b>Ogmore Valley</b>	650	12,920	10,510	1,430	-	4,730	<b>30,240</b>	2.6
<b>Pencoed</b>	43,919	32,159	-	1,930	-	18,179	<b>96,187</b>	8.2
<b>Porthcawl</b>	250	240	100	80	-	-	<b>670</b>	0.1
<b>Pyle / Kenfig / Cornelly</b>	11,270	46,218	14,649	3,010	8,420	6,790	<b>90,357</b>	7.7
<b>Valleys Gateway Area</b>	15,660	21,119	10,980	5,970	1,480	9,030	<b>64,239</b>	5.5
<b>Total</b>	<b>183,056</b>	<b>573,411</b>	<b>187,444</b>	<b>43,189</b>	<b>25,010</b>	<b>163,765</b>	<b>1,175,871</b>	<b>100.0</b>

- 4.7 Porthcawl. However, the Wales Spatial Plan Area Framework identifies Porthcawl as a linked settlement with Pyle in terms of delivering its role as a key settlement. With this in mind when combining the two sub-areas of Pyle and Pencoed together it creates a concentration of development which is comparable to other sub areas of the County Borough, this is enhanced by the presence of the Ty Draw Farm Strategic Employment site. It can also be argued that the traditional employment base of the Porthcawl area is not now based around the traditional employment / industrial estates but rather the tourism / service sector, which is not the subject of review in this report.
- 4.8 When assessing the availability of land currently within this portfolio of sites (Table 4.3), similar patterns emerge. In 2009 there was just over 209 hectares of vacant, undeveloped employment land distributed across the entire range of sites in the County Borough. Just over a quarter of this total land is available to develop immediately. When examining the figures in detail it is clear that the majority of sites which will be available in the medium or long term are those in public ownership (BCBC or WAG) or strategic sites identified in the LDP Strategy. This trend is useful to note and will mean that the public sector could bring forward these sites to meet the employment needs of the area, particularly in times of economic downturn which could help address the requirements of business which may not be being met by the private sector which is more hesitant at present.
- 4.9 Again, when looking at the distribution of the vacant land by LDP sub area (Table 4.4), it is clear that the lion's share is located in the Bridgend sub area. However, there are reasonable amounts of land located across the County Borough. Porthcawl remains the exception to this trend although probably for the same reasons as stated above. When one examines these figures in conjunction with the vacant floorspace figures it is clear that the Bridgend sub area has the most potential to offer new employment development opportunity. The purpose of this report will seek to examine these trends based against requirements, need and the LDP Strategy to ensure that future vacant employment land is in the right area.

**Table 4.3 Employment Land Availability in Bridgend County Borough in Hectares - Oct 2009**

Source: Bridgend County Borough Council

UDP Policy No.	Employment Site	Total Area	Remaining Vacant Area	Availability			
				Immed.	Short	Medium	Long
E3(1)	Abergarw Industrial Estate	9.23	3.0	3.0	-	-	-
E3(22)	Bairdwear Factory, Pyle	0.99	0.0	0.0	-	-	-
E2(1)	Brackla Industrial Estate	59.1	24.8	2.9	-	21.9	-
E2(2)	Bridgend Industrial Estate	127.61	8.9	8.9	-	-	-
E6(1)	Bridgend Science Park	11.84	1.0	1.0	-	-	-
E2(3)	Brocastle Waterton	52.13	46.3	0.0	-	46.3	-
E3(2)	Bryncethin Depot	1.38	0.0	0.0	-	-	-
E3(3)	Brynmenyn Industrial Estate	34.72	9.5	0.0	1.0	8.5	-
E3(4)	Coegnant Maesteg	8.15	8.2	0.0	-	-	8.2
E4(3)	Coity Sidings Bridgend	2.57	2.0	0.0	-	2.0	-
E10(3)	Coity Road, Bridgend	0.07	0.1	0.1	-	-	-
E3(5)	Coronation Works Evanstown	0.21	0.0	0.0	-	-	-
E4(1)	Coychurch Yard Bridgend	2.75	0.3	0.3	-	-	-
E4(2)	Crosby Yard Bridgend	1.3	0.1	0.1	-	-	-
E4(5)	Enterprise Centre Tondy	1.96	0.0	0.0	-	-	-
E3(6)	Ewenny Industrial Estate	5.61	0.0	0.0	-	-	-
E3(7)	Ewenny Road Maesteg	7.69	0.0	0.0	-	-	-
E4(6)	Ffaldau Industrial Estate	3.27	0.1	0.1	-	-	-
E3(8)	Forge Industrial Estate	4.97	0.0	0.0	-	-	-
E10(4)	Ravens Court, Tondy Rd	0.53	0.0	0.0	-	-	-
E3(9)	Georgia Pacific	20.98	2.2	2.2	-	-	-
E4(7)	Glan Road Porthcawl	0.27	0.0	0.0	-	-	-
E3(10)	Green Meadow Llangeinor	3.84	0.0	0.0	-	-	-
E3(11)	Heol Ty Gwyn Maesteg	5.6	0.2	0.2	-	-	-
E3(12)	Isfryn Industrial Estate	3.89	0.9	0.9	-	-	-
E6(1)	Island Farm Bridgend	26	26.0	0.0	-	26.0	-
E3(13)	Land at Heol y Splott	5.13	5.1	0.0	-	5.1	-
E3(14)	Land at Tondy	17	6.4	0.0	-	6.4	-
E6(2)	Land S.W.of Sony Technology Pk.	3.61	0.0	0.0	-	-	-
E3(15)	Litchard Industrial Estate	5.95	0.5	0.5	-	-	-
E3(16)	Llynfi Power Station	18.56	18.6	0.0	-	-	18.6
E10(2)	Mackworth Road, Bridgend	0.17	0.0	0.0	-	-	-
E4(8)	Maesteg Washery Site	1.0	1.0	0.0	-	1.0	-
E3(17)	Mid Glamorgan Depot Waterton	12.73	0.0	0.0	-	-	-
E6(3)	The Triangle Site Pencoed	10.19	1.0	1.0	-	-	-
E6(4)	Pencoed Technology Park	30.57	5.4	5.4	-	-	-
E3(18)	Penllwyngwent Ogmores Vale	11.85	4.9	0.0	-	4.9	-
E4(9)	Penybont Industrial Estate	0.71	0.0	0.0	-	-	-
E3(19)	South Cornelly	4.19	0.0	0.0	-	-	-
E4(10)	Spelter Maesteg	2.5	0.0	0.0	-	-	-
E10(1)	SWALEC Depot, Tremains Road	0.5	0.0	0.0	-	-	-
E4(11)	Trews Field Bridgend	5.08	0.0	0.0	-	-	-
E6(5)	Ty Draw Farm, Pyle	6.04	6.1	0.0	-	6.1	-
E3(20)	Village Farm Industrial Estate Pyle	45.8	4.4	4.4	-	-	-
E2(4)	Waterton Industrial Estate	124.6	12.6	12.6	-	-	-
E3(21)	Wern Tarw	28.83	8.7	8.7	-	-	-
E4(4)	Pwll y Waun	0.7	0.7	0.0	-	0.7	-
	<b>Totals (hectares)</b>	<b>732.37</b>	<b>209.1</b>	<b>52.4</b>	<b>1.0</b>	<b>129.0</b>	<b>26.7</b>

NB This data may differ from that previous published due to updates in accuracy

**Table 4.4 Employment Land Availability by LDP Area in Ha – October 2009**

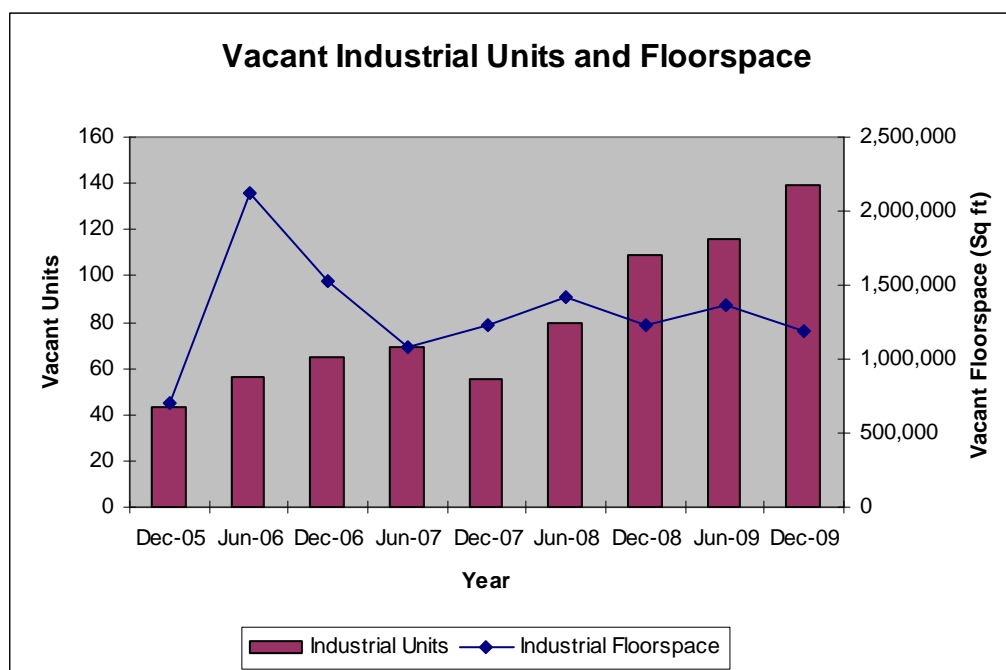
Source: Bridgend County Borough Council

Sub Area	Undeveloped	% Undeveloped
Bridgend	122.6	58.65
Garw Valley	0.1	0.03
Llynfi Valley	30.2	14.44
Ogmore Valley	5.8	2.79
Pencoed	15.2	7.26
Porthcawl	0.7	0.33
Pyle / Kenfig / Cornelly	15.6	7.45
Valleys Gateway Area	18.9	9.04
<b>Total</b>	<b>209.1</b>	<b>100.00</b>

- 4.10 One interesting statistic to note is that in the Llynfi Valley of the 41,433 square metres of vacant floorspace, 40,040 square metres is located on one site; Ewenny Road, the site of the former Budelpak COSi works and Cooper Standard. This site made up almost a third of the total supply of employment floorspace in the Llynfi Valley and demonstrates the impact the closure of these businesses will have had on the area.
- 4.11 Whilst the survey carried out by the Development Planning Section cannot identify trends over time, information from the Economic Development Unit of the Council has provided useful information as to how vacant industrial and office floorspace has changed since 2005.

**Figure 4.2 Vacant Industrial Units and Floorspace**

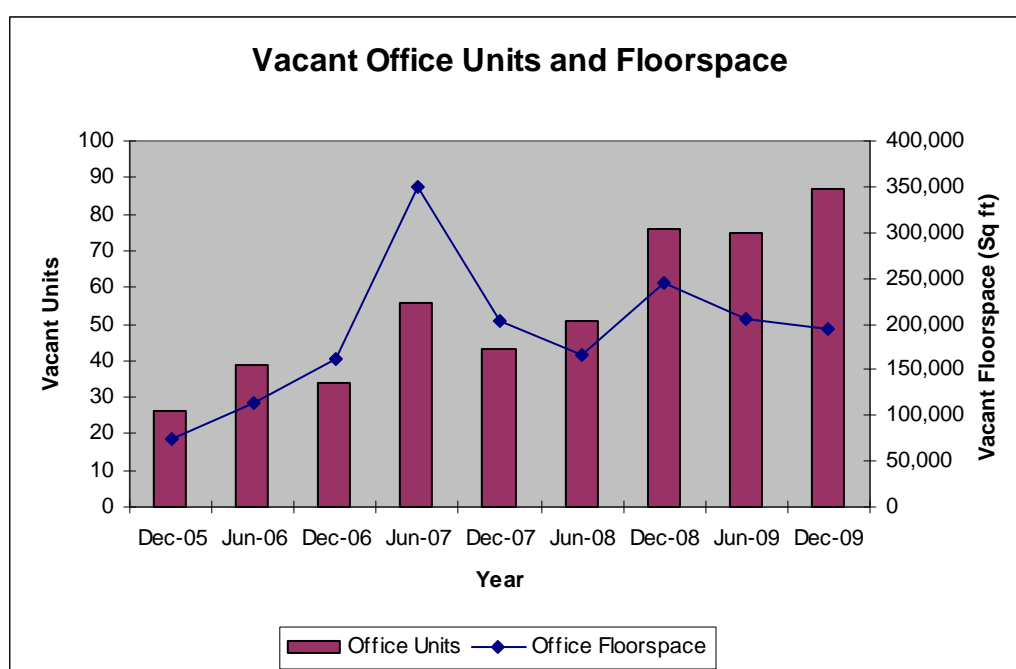
Source: Bridgend County Borough Council



4.12 In terms of both industrial and office developments, the number of vacant units available has generally increased over the period from 2005. However, what is noticeable is the peaks in the floorspace figures which appear in 2006 (figure 4.2) and 2007 (figure 4.3) which then see a marked reduction. These can be attributed to some high profile closures such as the Sony factory on Bridgend Industrial Estate, but this also clearly demonstrates the resilience of the market in Bridgend that investors were willing to take on these sites and sub-divide and remarket the sites successfully to occupiers. This reinforces Bridgend's position as being an attractive place to do business as already outlined in previous sections of the report and gives good indications for the future.

**Figure 4.3 Vacant Office Units and Floorspace**

Source: Bridgend County Borough Council



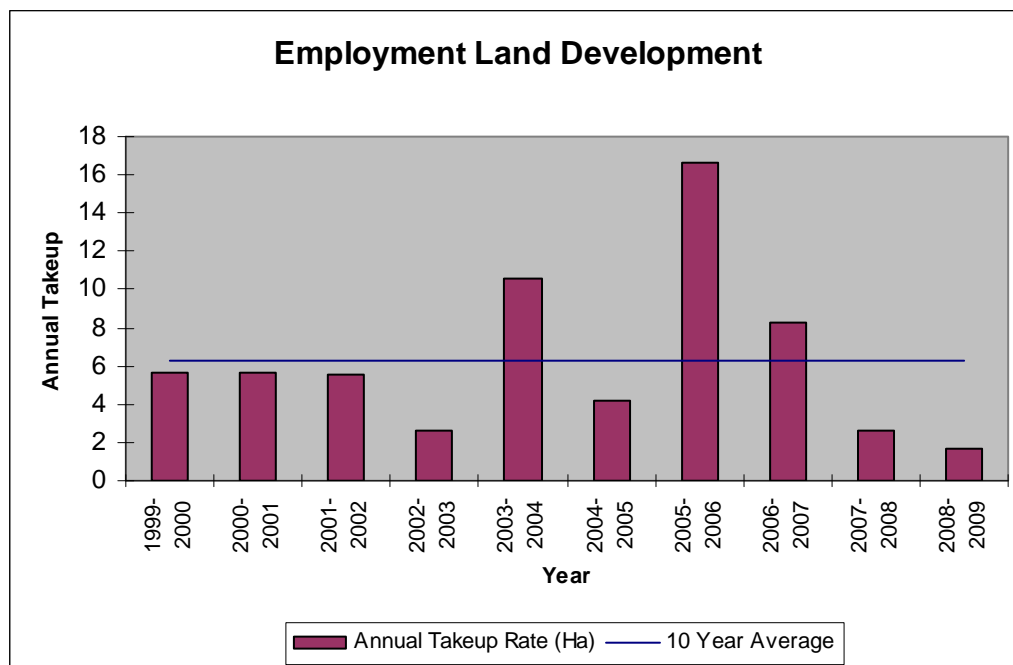
4.13 In terms of the take up of vacant employment land, the Council holds information back to 1999, this is displayed in figure 4.4. There has been an average take up rate of 6.33 hectares per annum over a ten year period. The range of annual development is from approximately 1.69 hectares in 2008/9 to over 16 hectares in 2005/6.

4.14 The high rate in 2005 / 2006 can be largely attributed to the Bocam Park development at Junction 35 of the M4, however other large warehouse developments over this period can also significantly contribute to this take-up. For example the Lidl distribution centre on Waterton Industrial Estate made a significant contribution in 2003/2004. Whilst these could be disregarded as one-offs, it is important to state that the desirability of Bridgend mean that these scale of developments could occur again in the future, particularly as a result of development sites owned by the public sector. It could therefore be argued that the

figure of 6.33 hectares pa of development is a useful starting point in assessing the amount of future need.

#### Figure 4.4 Vacant Employment Land Development

Source: Bridgend County Borough Council



#### Initial Sites Review

- 4.15 The 2004 Best Practice guide recommends that local authorities carry out an early review of their sites as part of the employment land review. This early assessment:

***“...is simply to identify those sites, when set against current aspirations of occupiers and developers, that should definitely be retained and those which could be released.”***

- 4.16 In addition to this, this preliminary appraisal of sites, in the context of preparing an LDP, can assist in identifying employment sites which could be reassessed for other, deliverable purposes, including mixed uses on sites which could still offer employment development as part of wider scheme. This is particularly pertinent for long-standing employment allocations which have no short to medium prospect of being developed by the open market, but, with a cross-subsidy from other developments, residential for example, could enable the delivery of employment development which meets the spatial strategy of the LDP to deliver growth in certain key areas of the County Borough.
- 4.17 In undertaking this initial review, the Best Practice guide also warns local authorities to: *“place boundaries around the Stage 1 analysis of the current portfolio”*. It is crucial that this preliminary appraisal of sites



does not become overly extended. Therefore in this initial review of sites the following assumptions have been made:

- 4.18 **Assumption One:** Those employment sites not allocated in the adopted UDP are excluded from the employment land review. This is reflective of the UDP approach of only protecting identified employment sites (Policy E7 refers). Recognising the fact that some existing industrial sites and buildings, currently not allocated in the UDP, may represent inappropriate or un-neighbourly uses and would benefit from relocation or replacement by a more suitable use.
- 4.19 **Assumption Two:** That those employment sites in the UDP which, at October 2009, have no vacant employment land are excluded from the initial review and will automatically be carried forward into the new portfolio of sites. An exception to this are those sites which are actively being promoted for redevelopment for various reasons. However, it is acknowledged that these sites may contain vacant premises and floorspace; this will be taken into account when assessing overall need for additional employment land and buildings.
- 4.20 Using the above assumptions 33 of the 47 employment sites identified in the UDP have been taken forward into the initial appraisal. This appraisal of sites is contained in full at Appendix One. The review follows a simple process of using criteria based scoring to carry out the assessment. The criteria are usefully included in the Best Practice guide (Boxes 4.5 and 4.6 refer). For the purposes of this review, one of the questions has been amended to refer to the Bridgend LDP Strategy rather than the delivery of an RSS/RES. The 4 strategic employment sites allocated in the LDP Pre Deposit Proposals have been assessed under the "High Quality" Allocated Employment Sites criteria. Due to their significant contribution to the overall land supply, commentary on these sites is included below.
- 4.21 Once these criteria have been addressed, each site is assessed and given an initial conclusion. This will either be: excluded as there was no vacant land as at October 2009; **exclude from further consideration and include in final portfolio; reassess for mixed uses potential; or wholly release from review for alternative uses.** The results are given in summary in table 4.2 below.
- 4.22 This assessment has been carried out as a desk-top exercise by officers from the Development Planning section, validated by colleagues from the Economic Development Unit and Property Department. It is a broad-based assessment using knowledge of the sites and does not examine every planning constraint which may cover the site. However, it does give a view on the broad deliverability of the site in planning and economic development terms.

**Table 4.2 Preliminary Employment Land Assessment Results**

Name	Initial Assessment Conclusion	Name	Initial Assessment Conclusion
Abergarw Industrial Estate	Exclude: Site in Final Portfolio	Heol Ty Gwyn Maesteg	Exclude: Site in Final Portfolio
Bairdwear Factory, Pyle	Excluded: No Vacant Land	Isfryn Industrial Estate	Reassess for mixed uses potential
Brackla Industrial Estate	Part Reassess for mixed uses potential	Island Farm Bridgend	Exclude: Site in Final Portfolio
Bridgend Industrial Estate	Exclude: Site in Final Portfolio	Land at Heol y Splott	Release for Alternative Uses
Bridgend Science Park	Exclude: Site in Final Portfolio	Land at Tondu	Reassess for mixed uses potential
Brocastle Waterton	Exclude: Site in Final Portfolio	Land S.W.of Sony Technology Park.	Excluded: No Vacant Land
Bryncethin Depot	Reassess for mixed uses potential	Litchard Industrial Estate	Exclude: Site in Final Portfolio
Brynmenyn Industrial Estate	Part Reassess for mixed uses potential	Llynfi Power Station	Release for Alternative Uses
Coegnant Maesteg	Reassess for mixed uses potential	Mackworth Road, Bridgend	Excluded: No Vacant Land
Coity Sidings Bridgend	Reassess for mixed uses potential	Maesteg Washery Site	Release for Alternative Uses
Coity Road, Bridgend	Release for Alternative Uses	Mid Glamorgan Depot Waterton	Reassess for mixed uses potential
Coronation Works Evanstown	Reassess for mixed uses potential	The Triangle Site Pencoed	Exclude: Site in Final Portfolio
Coychurch Yard Bridgend	Exclude: Site in Final Portfolio	Pencoed Technology Park	Exclude: Site in Final Portfolio
Crosby Yard Bridgend	Exclude: Site in Final Portfolio	Penllwyngwent Ogmore Vale	Exclude: Site in Final Portfolio
Enterprise Centre Tondu	Excluded: No Vacant Land	Penybont Industrial Estate	Excluded: No Vacant Land
Ewenny Industrial Estate	Reassess for mixed uses potential	South Cornelly	Excluded: No Vacant Land
Ewenny Road Maesteg	Reassess for mixed uses potential	Spelter Maesteg	Excluded: No Vacant Land
Ffaldau Industrial Estate	Exclude: Site in Final Portfolio	SWALEC Depot, Tremain Road	Excluded: No Vacant Land
Forge Industrial Estate	Excluded: No Vacant Land	Trews Field Bridgend	Excluded: No Vacant Land
Ravens Court, Tondu Rd	Excluded: No Vacant Land	Ty Draw Farm, Pyle	Exclude: Site in Final Portfolio
Georgia Pacific	Exclude: Site in Final Portfolio	Village Farm Industrial Estate Pyle	Exclude: Site in Final Portfolio
Glan Road Porthcawl	Excluded: No Vacant Land	Waterton Industrial Estate	Exclude: Site in Final Portfolio
Green Meadow Llangeinor	Excluded: No Vacant Land	Wern Tarw	Release Vacant Land for Alternative Uses
		Pwll y Waun	Exclude: Site in Final Portfolio

## Strategic Employment Sites

4.23 Details of the four strategic employment sites proposed in the LDP Preferred Strategy are given below.

### Brocastle, Waterton, Bridgend

4.24 Brocastle is one of the most important and prestigious greenfield inward investment sites within the South Wales M4 corridor. The site is

in a highly accessible and desirable countryside location on the outskirts of Bridgend, on the A48 towards Cowbridge.

- 4.25 Access is gained off the A48, approximately 2.5 miles from Junction 35 of the M4 motorway. A new road access (roundabout) with realignment of A48 is now in place. Re-profiling is required to create development plateaux.
- 4.26 The site is allocated as a Key employment site in the UDP. It is almost entirely undeveloped. It is considered to be the County Borough's greatest asset in terms of attracting large scale employment investment to the area. It is allocated as a Strategic Employment Site in the LDP Strategy.
- 4.27 The site is owned by the Welsh Assembly Government who are current developing a Masterplan to cover the site for employment purposes in order to secure European funding to facilitate further road and utility infrastructure to make the site 'occupier-ready'. The Masterplan will also detail the development plateaux in more detail and examine the feasibility of bringing forward smaller-scale development, more suited to the changing employment structure up to 2021.

#### Island Farm, Bridgend

- 4.28 Island Farm is a prestigious greenfield site in an accessible location along the A48, adjacent to the Bridgend Science Park. 5 miles from junction 35 and 37 of the M4 motorway. Part of the site comprises of a former Prisoner of War camp. New access to the site will be required off the A48.
- 4.29 Use of the site will be restricted to high technology or prestige firms of employment which requires high design standards. Hut 9 of the former Prisoner of War camp is to be retained & is now a listed building. Any development would have to take into account the building & if necessary incorporate it into design and layout. There would be a requirement for high quality landscaping and architectural design in any development, similar to the existing Science Park developments.
- 4.30 The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP. It is currently subject of a planning application for a mix of uses, centred on a new rugby league stadium and training facilities as well as other leisure, commercial and office uses.
- 4.31 It is considered pertinent to keep the site in the employment land supply wholly for B1, B2 and B8 uses and only reflect a change should the planning status of the site alter. However, the planning application has raised the issue that significant areas of the site have biodiversity interest which would need to be reflected in *any* employment development on the site should the current proposals not proceed. With

this in mind it would be realistic to reduce the vacant area of employment land available to approximately 11 hectares; this reflects the total amount of developable land on the site when the biodiversity interest is taken into account.

### Pencoed Technology Park

- 4.32 This is a greenfield site which was allocated for Special Employment Uses in the UDP. Whilst most of the site lies within the neighbouring Rhondda Cynon Taf authority, some 5 hectares remain in Bridgend under the ownership of BCBC and the Welsh Assembly Government.
- 4.33 The infrastructure requirements for the wider site to the south (in RCT) are in place. The Council is working with WAG to attract development which will facilitate the provision of appropriate infrastructure in the Bridgend area.
- 4.34 The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP. The site has the benefit of outline planning permission for B1, B2 and B8 uses, although no development on the Bridgend side of the site has been consented in detail. There are also proposals to redevelop part of the former Sony site for employment uses.
- 4.35 Given the extant planning permission on the site together with ongoing activity to ensure development is brought forward on this site, it is considered pertinent to keep the site in the employment land supply wholly for B1, B2 and B8 uses.

### Ty Draw Farm, North Cornelly

- 4.36 This 6 hectare greenfield site, owned by the Welsh Assembly Government, is located west of the A4429 within the north west quadrant of junction 37 of the M4 motorway. The site is bounded to the west by residential development and is well screened by a dense tree belt from the A4429. The land slopes considerably up towards the north of the site, where the crown is visible and highly exposed.
- 4.37 It offers an opportunity to provide much needed high quality employment opportunities within a landscaped environment, close to the deprived community of Marlas, which is a designated Communities First Area. It also provides a strategic employment opportunity to serve the local economy in the western part of the County Borough.
- 4.38 This site was subject to an objection during the UDP Inquiry where a residential allocation was sought, the Inspector recommended it remain as employment land. In addition, in 2005, an application for residential development on this site was dismissed.

- 4.39 The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP. Given the location of this site, it is considered pertinent to keep it in the employment land supply wholly for B1, B2 and B8 uses.

#### **Issues / Messages to take forward**

- 4.40 There is a plentiful supply of employment land and premises across the County Borough. This should be viewed both positively; in terms of the County Borough's offer of a range and choice of flexible employment sites, as well as negatively; in acknowledging that some of these sites have remained vacant for significant periods of time with little or no interest for their development for employment purposes. These issues will need to be balanced by the recommendations from this report.
- 4.41 For the periods examined there has always been a good supply of vacant premises available for occupation. Despite this, development of vacant, allocated employment land has always occurred at a long-term average rate of 6.33 hectares per annum.
- 4.42 In terms of the conclusions from this initial assessment it can be seen that:
- ◆ Those strategic employment sites identified in the LDP Preferred Strategy will be carried forward to the final portfolio
  - ◆ Other sites with known development interest for mixed uses should be investigated further with a view to reassessment. This may mean that the employment element is reduced or excluded all together. However a thorough assessment of market need and spatial policy-led issues will need to be undertaken prior to a final decision being made on this.
  - ◆ Those other part-developed industrial estate areas with remaining vacant plots of land will be carried forward to the final portfolio
  - ◆ There are significant opportunities for the redevelopment of some existing large employment sites during the plan period which need to be taken into account.
- 4.43 The sites will now be taken through to Stage 3 of the process where their status will be confirmed following an assessment of future need.
- 4.44 **Of course, whilst this assessment recommends that certain sites be released for alternative uses or reassessed for potential mixed use development schemes, any release should be controlled and guided by the Local Development Plan. Until such a time as this is adopted by Bridgend County Borough Council, the employment policies of the Unitary Development Plan will continue to apply, although this assessment may be used as a material consideration in assessing planning application where appropriate.**

- 4.45 In order to move the assessment forward from this point, it is now appropriate to consider and analyse the employment property market in Bridgend County Borough to understand the future quantity and type of land required across the main business sectors. For the purpose of this review primary research has been undertaken to aid in the assessment of future need.
- 4.46 Stage Two of the employment land review therefore looks at the outputs from these research methods which, together with secondary data sources, result in forecasts for employment land for the LDP period.



## **STAGE TWO – CREATING A PICTURE OF FUTURE REQUIREMENTS**

### **5. Property Market Overview and Analysis**

- 5.1 In order to assess the likely future requirement for employment land and buildings it is first pertinent to examine the current situation regarding the industrial and office markets nationally, regionally in South Wales and Bridgend County Borough itself.
- 5.2 This has been undertaken by a variety of means. Most notably some 40 property agents and developers working in the Bridgend area were contacted for their views on the current state of the employment markets in the County Borough. In addition they were asked for their professional assessment of any likely changes in the market over the LDP period.

#### **Property Market Analysis**

- 5.3 Prior to examining Bridgend County Borough's property market by the individual components of sites and sectors (industrial / offices) it is important to examine the area as a whole including analysis of existing monitoring data.

#### **Welsh Assembly Government**

- 5.4 The Welsh Assembly Government (WAG) has a number of significant land and property holdings in Bridgend County Borough. In terms of land ownership it currently possesses the strategic sites of Brocastle, Ty Draw Farm and Pencoed Technology Park which have all been designated as Strategic Sites in the LDP. Its other significant holding includes Brackla Industrial Estate which is currently subject to a Masterplanning exercise. Other areas within its ownership include parts of Waterton Industrial Estate. All of these areas currently have employment use allocations.
- 5.5 In the wider region, the WAG is also currently promoting a major business park of national importance on 40ha of land at Junction 33 of the M4 near Cardiff. The need for this development has been endorsed in their Property Strategy. The development proposal is subject to objection both through the Development Control and Development Planning processes. In addition, the WAG are supporting the application for a Military Training Academy at St Athan as well as promoting an adjacent scheme for a Aerospace Business Park. The development of these sites could have a significant impact on the property market in Bridgend with a diversion of investment away from the County Borough generally.
- 5.6 Table 5.1 shows the enquiries which the WAG have received for premises and land since 2005. This data has only recently been available on a local authority basis. It is clearly seen that the demand

for industrial premises far exceeds that of offices and land. Whilst it is also clear that the total number of enquiries has dropped recently, these figures also demonstrates Bridgend's attractiveness in the sub region; with over a third of total enquiries in the South Wales Valleys areas concerning land, and approaching a quarter of those relating to office and industrial developments.

**Table 5.1 WAG Enquiries by Type for South Wales Valleys and Bridgend**

Source: Welsh Assembly Government

Type	South Wales Valleys					Bridgend		
	2005/6	2006/7	2007/8	2008/9	Total	2007/8	2008/9	Total
Office	234	242	608	447	1,531	284	100	384
Industrial / Warehouse	697	585	1,447	1,024	3,753	637	241	878
Land	115	159	215	116	605	119	42	161
<b>Total</b>	<b>1,046</b>	<b>986</b>	<b>2,270</b>	<b>1,587</b>	<b>5,889</b>	<b>1,040</b>	<b>383</b>	<b>1,423</b>

5.7 Tables 5.2 and 5.3 show the enquiries in more detail. For Bridgend the Industrial queries requested premises right across the spectrum of sizes. For the office market over half of all enquiries related to premises of less than 929 sq m. In terms of land requirements, again, whilst the majority of sites requested were at the lower end of the market there is still some interest in larger areas of land in the County Borough. This ties in with earlier comments, related to the availability of land, and the fact that a lot of WAG, particularly the larger, strategic sites are not immediately developable, and so the requirements of these enquires cannot be met at the present time.

**Table 5.2 WAG Enquiries by Type and Size for South Wales Valleys and Bridgend**

Source: Welsh Assembly Government

	Type	Size Band, sq ft (sq m)								Total
		0.01-5,000 (0-465)	5,001-10,000 (465-929)	10,001-15,000 (929-1394)	15,001-20,000 (1394-1858)	20,001-25,000 (1858-2323)	25,001-50,000 (2323-4645)	50,001-100,000 (4645-9290)	100,001+ (9290+)	
South Wales Valleys 2005 – 2009	Industrial / Warehouses	866	339	208	156	119	339	228	201	2,456
	Offices	596	128	56	38	25	86	34	14	977
	<b>Total</b>	<b>1,462</b>	<b>467</b>	<b>264</b>	<b>194</b>	<b>144</b>	<b>425</b>	<b>262</b>	<b>215</b>	<b>3,433</b>
Bridgend 2007 – 2009	Industrial / Warehouses	74	54	47	32	23	86	58	62	436
	Offices	87	32	18	10	4	27	8	6	192
	<b>Total</b>	<b>161</b>	<b>86</b>	<b>65</b>	<b>42</b>	<b>27</b>	<b>113</b>	<b>66</b>	<b>68</b>	<b>628</b>

**Table 5.3 WAG Land Enquiries by Size for South Wales Valleys and Bridgend**

Source: Welsh Assembly Government

Size (Ha)	0.01 - 5	5.01 - 10	10.01 - 15	15.01 - 20	20.01 - 25	25.01 - 50	50.01 - 100	100.01 +	Total
<b>South Wales Valleys 2005 - 2009</b>	293	102	43	44	16	47	20	18	<b>583</b>
<b>Bridgend 2007 -2009</b>	48	30	14	22	6	12	6	8	<b>146</b>

**Bridgend County Borough Council**

5.8 In a similar fashion to the WAG, Bridgend County Borough Council's Economic Development Unit also maintains records on employment property enquires; these are illustrated in tables 5.4 and 5.5. It should be noted that small businesses are more likely to contact the Council directly concerning their property requirements; however the reverse could equally apply to larger sites and the WAG so a broad picture is presented in totality here.

5.9 Again, the nature of enquiries is very much biased towards the industrial / warehouse markets, making up over two thirds of total enquiries over this four year period. The majority of enquires are for small sites, however once again, the demand for larger premises is still clear.

**Table 5.4 Employment Property Enquires in Bridgend County Borough**

Source: Bridgend County Borough Council

Type	2006	2007	2008	2009	Total
<b>Industrial / Warehouses</b>	171	292	243	117	<b>823</b>
<b>Offices</b>	101	120	133	52	<b>406</b>
<b>Total</b>	<b>272</b>	<b>412</b>	<b>376</b>	<b>169</b>	<b>1229</b>

**Table 5.5 Employment Property Enquires by size in Bridgend (2006 – 2009)**

Source: Bridgend County Borough Council

Type	Size Band, sq ft (sq m)							General / Full Register	Total
	0.00-1,000 (0 – 93)	1,001- 2,500 (93-232)	2,501- 5,000 (232 – 465)	5,001- 10,000 (465 - 929)	10,001- 25,000 (929 - 2,323 )	25,001- 50,000 (2,323 – 4,645)	50,000+ (4,645+)		
<b>Industrial / Warehouses</b>	204	174	142	103	77	45	35	44	<b>824</b>
<b>Offices</b>	172	101	43	19	12	10	8	93	<b>458</b>
<b>Total</b>	<b>376</b>	<b>275</b>	<b>185</b>	<b>122</b>	<b>89</b>	<b>55</b>	<b>43</b>	<b>137</b>	<b>1282</b>

- 5.10 Whilst the ability of the WAG and the Council to meet every one of these enquiries is not known, the ability of these organisations to offer premises largely depends on the availability of vacant buildings. Data is available on this and is shown below in Tables 5.6 and 5.7. A broad examination indicates from December 2009 indicates that there is generally industrial and office availability in most of the different sizes of office and industrial premises.
- 5.11 A key question therefore in the consideration of these issues of take-up of employment floorspace are the quality and location of the current stock of employment land and premises. In order to ascertain a view on these issues, this study has sought to obtain the views of property surveyors working in and around the Bridgend and South Wales area as to the current and future state of the employment property market in the County Borough.

**Table 5.6 Vacant Industrial Property Floorspace in Bridgend County Borough – December 2009**

Source: Bridgend County Borough Council

Square Metres	Square Feet	Units	Area - sq ft	Area - sq m
<b>0 - 93</b>	<b>0 - 1,000</b>	19	15,730	1,461.36
<b>93 - 232</b>	<b>1,001 - 2,500</b>	24	41,714	3,875.36
<b>232 - 465</b>	<b>2,501 - 5,000</b>	51	173,197	16,090.53
<b>465 - 929</b>	<b>5,001 -10,000</b>	20	158,503	14,275.41
<b>929 - 2,323</b>	<b>10,001 - 25,000</b>	15	263,539	24,483.57
<b>2,323 – 4,645</b>	<b>25,001 – 50,000</b>	6	221,658	20,592.7
<b>Above 4,645</b>	<b>Above 50,000</b>	4	320,000	29,728.97
<b>Number of units and floorspace</b>		<b>139</b>	<b>1,194,341</b>	<b>110,507.9</b>

**Table 5.7 Vacant Office Floorspace in Bridgend County Borough – December 2009**

Source: Bridgend County Borough Council

Square Metres	Square Feet	Offices	Area - ft <sup>2</sup>	Area - m <sup>2</sup>
<b>0 - 93</b>	<b>0 -1,000</b>	39	15,605	1,449.75
<b>93 - 232</b>	<b>1,001 - 2,500</b>	26	44,741	4,156.57
<b>232 - 465</b>	<b>2,501 - 5,000</b>	17	58,141	5,401.48
<b>465 - 929</b>	<b>5,001 -10,000</b>	0	0	0
<b>929 - 2,323</b>	<b>10,001 - 25,000</b>	5	75,594	7,022.91
<b>2,323 – 4,645</b>	<b>25,001 – 50,000</b>	0	0	0
<b>Above 4,645</b>	<b>Above 50,000</b>	0	0	0
<b>Number of offices and floorspace</b>		<b>87</b>	<b>194,081 ft<sup>2</sup></b>	<b>18,030.71 m<sup>2</sup></b>

### National and Regional Picture

- 5.12 In order to gain a picture of the current state of the national and regional markets, a review has been undertaken of several research

publications which are widely available from several national property market firms<sup>1</sup>.

5.13 These assessments written in 2009 / 2010, whilst written by different commentators highlighted several common themes and predictions within the property market:

- ◆ The industrial market has not been as badly affected by the recession as previous ones, although it is at its quietest period for some time.
- ◆ Buyers of industrial land were still making acquisitions as they perceive values to be low. Similarly existing occupiers are taking advantage of the low rents to upgrade their locations etc.
- ◆ Where rents have held up this has been due to increased incentives.
- ◆ The office market in South Wales has remained relatively robust thanks to its broad / mass market appeal.
- ◆ That Grade A industrial and office developments were dominating recent take-ups to the detriment of second-hand buildings.
- ◆ *“The effect of the secondary market will be worse with occupiers returning to the central tenet of quality space in quality locations, with particular emphasis on units that are fully fitted with electricity and heating, due to lack of appetite for large amounts of capital expenditure. We also expect that there will be a move away from the freehold market to shorter, more flexible leaseholds as occupiers look to decrease their commitments”* (GVA Grimley)
- ◆ That a drop in completions (and little development commencing) would limit stock and maintain rents, keeping the market healthy.
- ◆ *“Lack of new floorspace will hinder economic recovery and the public sector should ‘enable’ where possible. For example at a local level, the release of further appropriate employment land is required”* (King Sturge)
- ◆ Office enquires are starting to rise again which indicates signs of a lift.
- ◆ A slow recovery is forecast until 2013 / 2014

### **Agent Feedback 2006**

5.14 Before the current situation in Bridgend is reviewed in the midst of an economic downturn, it is timely to reiterate the feedback from agents received in more prosperous times. Repeated below is an extract from the Robert Chapman Report of 2006:

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<sup>1</sup> Alder King, Cooke and Arkwright, DTZ, GVA Grimley, King Sturge, Knight Frank and Lambert Smith Hampton.

**Box 5.1 Agent Feedback from 2006 Report**

Source: Robert Chapman Report 2006

***On the subject of offices, agents observed that the office scene had developed considerably (near Bridgend) within the last 5 years. As a location, agents perceive Bridgend to be reasonably well regarded: well connected and a grant area to boot. One agent was cautious and suggested that Bridgend had a finite market fuelled by local businesses catering for a local audience and 'local covenants'. This seems to fly in the face of lettings procured by the Hegatty family in providing quality office space in the Town centre and indeed the lettings of Raven's Court. On the other hand, another agent was much more upbeat.***

***Most of the new offices are now located on the periphery of Bridgend providing greater accessibility. This trend has taken a number of local businesses out of the Town Centre in a move away from older second hand office space (Celtic Court / Derwen House / Brackla House / Avon Court) to more contemporary (DDA / Building Regulation compliant) space. It was suggested that better quality office space would have a greater chance of attracting occupiers such as Jigsaw and Creditsafe.***

***Turning to the subject of Industrial, the perception is that Bridgend CBC is well located (Junctions 35, 36 and 37 of the M4; access to Cardiff International Airport as well as access to Ports), lies within a Tier 1 grant area, possesses decent industrial estates and has a decent pool of skilled labour.***

***An agent suggested that there was no embarrassment in taking people to Bridgend. Furthermore, the area seems to generate its' own enquiries which are predominantly local. Further agent feedback suggests that there is a shortage of small decent quality units – indeed a shortage of land which, for example in the case of Abergarw, led to an increase in land value from £60,000 per acre to £100,000 per acre.***

***A parallel situation occurred in Maesteg when a number of ex-WDA units at Spelter became available to purchase. At first, the agent thought it would be difficult to sell the units in a relatively remote area. However, all units were snapped up in a very short period of time.***

***One agent suggested that there was good company churn and that the market place was as good as it gets. He was not too worried about the quantum of large space. This point was echoed by another agent who felt that the outlook was reasonably bright. In his view, the availability of large space is an opportunity.***

**Developer / Agent Feedback 2010**

5.15 With the assistance of the Council's Property Department, approximately 30 property agents and employment land developers working in the Bridgend County Borough area were contacted to ascertain their views on the current state of the employment land market and how they saw these trends developing in the future. Of those contacted substantive replies were received from 10 companies.



- 5.16 The specific questions asked plus the details of those companies and professionals responding can be found in Appendix Two.
- 5.17 Firstly, the views of the professionals was sought on the current state of the employment property market in Bridgend County Borough, a selection of views is given in box 5.2.

#### **Box 5.2 Agent Feedback 2010: Past and Current Situation**

*Whilst there is a shortage of demand from both local and national occupiers there is also a significant over supply of industrial space available locally, particularly of industrial units 10,000 sq ft plus. The effect of this over supply has been to drive rental values down over the course of the last three or four years.*

*During normal market conditions there has historically been a marked shortage of well located development land within Bridgend County Borough particularly of plot sizes from say ½ an acre to 2 acres. In my view the lack of availability of such sites over the course of the last ten years or so has meant the loss of employment and development opportunities for the County.*

*Bridgend County offers office accommodation within a mixture of location including Business Parks, town centre and secondary locations and there is currently availability within all these sectors.*

*There is currently a reasonable mix of quality and second properties offices available within the County but a shortage of space could arise if the market were to improve sharply particularly given the lack of spec development in the area.*

*The current trend for office demand seems to be moving from Business Parks and out of town location into the town centre as occupiers are keen to take advantage of amenities and public transport links.*

*We tend to see mainly local and regional enquires as opposed to national requirements and Bridgend offers a strategic base to service both West and East Wales due to its location adjacent to the M4. This location has helped the secure the current occupancy rates on the Business Parks.*

*The County also benefits from Objective One status which offers an additional incentive to companies considering Bridgend as a location.*

*Bridgend Industrial Estate remains the heart of industrial occupation with a range of national companies in place. Brynmenyn and Ewenny Industrial Estate continue to attract mainly local occupiers due to their location and carry relatively high availability rates. The success of estates in the Maesteg area remains low due to the very restricted demand which comes from with the immediate catchment.*

*In recent years South Wales has been dominated by indigenous demand with few true inward investment. This has been illustrated in Bridgend with the majority of requirements in the last few years being local companies looking to*

***expand and relocate to suit their current business needs.***

***Where there has been examples of large scale schemes suitable for headquarters type occupiers, as evidenced by Waterton House, there has been little or no interest for companies to occupy a building of this size in Bridgend.***

***Bridgend suffers from the same issues as most other towns, i.e. a lack of demand as a result of the economic issues.***

***The Bridgend office market has not witnessed the same level of demand and take up from office occupiers when compared to other locations within South Wales. There appears to be a limited market and only a finite amount of tenants in Bridgend. Where there has been interest from occupiers specifically within the Bridgend market, the majority have resulted in acquiring office accommodation at Bocam Park mainly due to its proximity to the M4 corridor.***

***Availability of stock seems to be relatively high with mix of both older and larger space (Brynmenyn type areas) together with smaller accommodation newly built (York Court, Central Park) to meet owner occupier style requirements. Historically Bridgend Industrial Estate is arguably the most successful estate mainly due to proximity to both the M4 Motorway and Bridgend Town Centre, both of which are only 3 to 4 miles away. Other estates like Brynmenyn, Litchard, etc have all traditionally got older and larger stock so in recent months have probably generated less demand.***

***Bridgend remains popular for those enquiries in the market – good connectivity, workforce & grant status. Our research shows 16 industrial deals in South Wales over the past 15 months involving units of over 50,000sq ft and all bar 3 of these have been along the M4 corridor – the Valleys and West Wales are struggling far more than the M4 corridor in South East Wales.***

***Bridgend has a high level of dated industrial supply and is vulnerable to ageing and obsolescence.***

***Estate fragmentation – as estates moved from the public to private sector the ‘feel’ has gone, lack of estate management and this needs attention.***

***Spec development of offices has taken place however a lot currently vacant.***

***Most demand for units within Bridgend town only (ie. Bridgend Ind. Est, Brackla, Waterton, etc.) - much less demand for units on estates north of M4.***

- 5.18 To summarise the existing situation as outlined by responses it is clear that, under usual economic conditions there would be a shortage of land for employment; however developments to date have been on a variety of sites which meet the varying needs of businesses. It is clear the economic situation is a barrier to further development, however concern is being expressed over the ability of the development industry to bring sites forward quick enough when the situation improves. This perhaps has implications for the public sector and its ability to bring forward sites forward in generally unviable times but for the long term benefit of the area.

- 5.19 The majority of interest in Bridgend comes from local and regional firms. The office market can attract regional operators, however the area is not on the radar of large, prestigious organisations despite (or perhaps because of) its Objective 1 status.
- 5.20 Bridgend's location on the M4 is certainly an attractive feature to investors, however away from this strategic corridor, on sites north of the motorway in the valleys, creating a market which is attractive to businesses is challenging. Any interest in these areas comes from a much localised area.
- 5.21 The second part of the process concentrated on ascertaining the views on the market in the years to come, stretching to the end of the LDP in 2021. A selection of views is given in box 5.3.

### **Box 5.3 Agent Feedback 2010: Future Situation**

*There does appear to be an increased amount of optimism in the market, certainly compared to last year, however, market conditions will remain difficult during 2010. The General Election will have a negative impact on decision making leading to a slowdown in decision making during the middle part of the year. Furthermore the decline in public sector requirements and downsizing will have a negative impact on the market. We anticipate seeing an increase in occupier activity during 2011.*

*I do not envisage a marked improvement in occupier demand for the remainder of 2010 and indeed perhaps well into 2011.*

*In my view Bridgend County Borough Council need to have regard to the old adage of "location, location, location" when deciding on the future provision of employment land within the UDP/LDP; the majority of both owner-occupiers and developers look to develop on sites located within just a mile or so of the Bridgend and Waterton Industrial Estates and are generally speaking loathe to consider outlying employment development sites such as Spelter, Ffaldau or even the Village Farm Industrial Estate at Pyle. In my view, to encourage small scale but sustainable development locally, employment development sites with infrastructure capable of offering development plots 0.5 of an acre, 1 acre and say 2 acre lots are required so as to encourage small scale development. The former Mid-Glamorgan Supplies Depot on the Waterton Industrial Estate would for example in my view be an excellent site for future small-scale development*

*Other well located sites within Bridgend County Borough Council include Brocastle where in my view the Welsh Assembly Government need to drastically rethink their strategy if they are to stimulate industrial development/employment locally. At present the site is set aside for large scale inward investment only, looking to attract industrial occupiers developing 100,000 sq ft plus; the topography of the land however is in no way suitable for such large scale footprints.*

***If Bridgend is to grow its industrial base then in my view well located development land along the M4 corridor need to be brought to the market place within the next three to five years.***

***We don't anticipate any significant improvement in market within the next 18 months based on current trends.***

***For 2021, as long as suitable land is made available for employment and development schemes see no reason why it should be any less competitive than it is at the current time. The County needs to maintain a consistent level of available sites for employment to meet any future demand.***

***With South Wales prime rents now achieving £21 per sq.ft., assuming this level increases over the next five years, then there may be a larger gap between regional rents which could persuade some to consider a move to less costly regions, for which Bridgend would be expected to feature. Importantly the demographic pool and costs should correlate to complement the property side of a move.***

***Large amount of demand being taken from the local business area of Bridgend and future and further demand is mainly going to come from those looking to invest within the area and also from occupiers that have outgrown their existing accommodation.***

***I think we have seen fairly good take up within the last two years within the office accommodation in Bridgend. However this has now been subdued and I think future demand within 12-18 months is going to be fairly limited generally and concessionary deals will need to be offered.***

***As far as 2016 and the LDP in 2021 is concerned then obviously it is very difficult to predict what the office market will be like in the future. However I think Bridgend would need to be offered a flexible basis with a fair amount of assistance to developers and employers within the area.***

***Thinking circa 5 years further ahead, it is likely that there will be future growth in the office market.***

***The freehold office market is likely to improve in the size ranges of 2,500 – 4,000 sq.ft. which will lead to an increase in the conversion of vacant Industrial units and other low density sites to office courtyard schemes and possibly stand alone buildings.***

***I don't see any major changes in either office or industrial markets in the next ten years or so. My concern is that manufacturing will actually decline over that period and I think the Borough's employment land should be aimed more at the industrial/manufacturing sector (as opposed to the service sector).***

***Lidl illustrates that B8 can be attracted however Bridgend is at the western fringe of the 'prime' patch of M4 corridor in South East Wales and cannot be expected to be a natural B8 location. The cancellation of the Newport M4 relief road may also push B8 occupiers back to Magor & Chepstow.***

***I would hope that Bridgend's total stock will have reduced by 10-20%, demolition and/or redevelopment of older stock is to be encouraged. Available supply needs to be tightened by removing the worst 10-20%. Re-development***

***of fringe estates maybe the right thing to do – Ewenny, Brackla, outskirts of Brynmenyn, Maesteg etc.***

***I can foresee a definite shortage of good quality workshop/industrial units of 5 – 10,000 sq. ft. in prominent locations in the not too distant future. Also seems a recent upsurge in demand from trade counter operators looking for c. 5,000 sq. ft..***

***I am positive about the general commercial property market over the next 18 months or so. 2010 will continue to be difficult, but already enough signs to indicate that this year will be better (albeit only slightly) than last year. However this comment is reserved for Bridgend town, and not necessarily the wider borough.***

***Much less larger units in excess of 10,000 sq.ft. being required, and more units being used for storage & distribution, or light assembly only. Definite continuation in demise of general manufacturing.***

***I can also foresee a rise in demand for trade park locations, with maybe the planners needing to take a more relaxed view towards trade counter/retail-type development.***

***Planners to also take a more relaxed view towards leisure facilities on industrial estates? eg. to encourage say units used for child's play/crèche facilities, and other general leisure operations.***

***Limited office demand or development – focus from larger occupiers on Cardiff and the South East Wales M4 corridor where speculative development will return.***

***Focus from Bridgend should be on small good quality office and industrial developments for SME's – small sites with good infrastructure and connectivity rather than large secondary and peripheral sites.***

### **Issues / Messages to take forward**

- 5.22 In summary, there appears to be some short term uncertainty over the future state of the employment property market; however this situation is not necessarily restricted to Bridgend but is representative of the national picture.
- 5.23 There is a view that employment land should be released along the M4 corridor and, as previously stated, there are concerns regarding the peripheral estates of the County Borough and their ability to attract investment.
- 5.24 The suggestion is that Bridgend will become a more attractive place to invest in if rents across the region keep on rising. However there is a need to ensure that the labour and skills are in place to be part of an

attractive package to promote the area and its available employment land. This issue is being addressed under initiatives in the Bridgend Regeneration Strategy. Focus should also be given to the delivery of smaller developments to attract SMEs etc. and those developments which will appeal to those businesses looking to expand.

- 5.25 In terms of the type of development required, opinion was mixed on the future of both the office and industrial sectors in the County Borough. The emphasis therefore must be on flexibility of employment sites to bring forward all kinds of employment development with less regulation to encourage diversity on sites to meet demand. The quality of development did not seem to be raised as an issue; however it was noted that expensive prestigious schemes would be hard to attract to the area.
- 5.26 It is stated that Bridgend needs to maintain its consistent level of available sites to meet demand and that public sector agencies should respond appropriately to release sites. However, this is allied with a request for a more relaxed policy approach regarding trade counter / leisure uses on employment sites.
- 5.27 The findings of these responses will be taken forward and used in the qualitative assessment of future employment land supply undertaken in section 7 of this report.

## 6. Business Survey

- 6.1 As part of the primary research associated with this report a business survey was carried out to give an indicative assessment of potential demand for employment land in Bridgend County Borough. The results of the survey can be used to evidence future need as well as informing the studies final conclusions.
- 6.2 1,043 businesses operating in Bridgend County Borough were contacted (from data contained in the Council's business directory) either by email or letter and asked to complete a questionnaire (included at Appendix Three) either online or in hard copy form (with pre-paid envelope enclosed). Considering the number of businesses registered for VAT purposes in the County Borough (see above) totals some 3,700 companies this database is considered an excellent resource in contacting the business community. A range of organisations from small, one person operations, to large multi-national organisations were on the database from a variety of industries and sectors.
- 6.3 Responses were received from 124 businesses, which represents a 12% return and approximately 3% of all companies operating in the area; a reasonable return. Whilst this response is reasonable it should be stated that the figures calculated in the rest of this section should only be viewed as indicative as the sample response would not be able to produce reliable and robust data.
- 6.4 Table 6.1 illustrates the level of response by LDP Sub Area, these broadly follow the population and business location distribution of the County Borough, although Porthcawl appears to be slightly underweighted and Bridgend slightly over-weighted in terms of responses received. Nevertheless, a broad and representative response.

**Table 6.1 Business Response by LDP Sub Area**

Source: Bridgend County Borough Council

Area	Proportion of Population (%)	Proportion of Businesses (%)	Number of Companies Responding	Proportion of Companies Responding (%)
<b>Bridgend</b>	33	42	63	51
<b>Porthcawl</b>	12	13	5	4
<b>Llynfi Valley</b>	16	10	8	6
<b>Pencoed</b>	7	8	6	5
<b>Valleys Gateway</b>	8	10	19	15
<b>Pyle / Kenfig / Cornelly</b>	12	11	15	12
<b>Ogmore Valley</b>	6	3	2	2
<b>Garw Valley</b>	6	3	4	3



- 6.5 The response by company profile was also very broad as represented by the data in tables 6.2 – 6.4. Companies both large and small took part in the survey with significant numbers of larger companies taking the time to respond. This could represent an over weighting of larger companies given that only 6% of companies in the County Borough employ over 20 people. Companies were also asked to indicate if they owned or rented their current property; just over 53% stated that they rented.

**Table 6.2 Business Response by Number of Employees**

Source: Bridgend County Borough Council

Number of Employees	Number of Companies Responding	Proportion of Companies Responding (%)
0 - 2	23	19
3 - 5	25	20
6 - 10	27	22
11 - 20	18	15
21 - 50	15	12
51+	16	13
<b>TOTAL</b>	<b>124</b>	<b>100</b>

**Table 6.3 Business Response by current premises size**

Source: Bridgend County Borough Council

Size	No.	Proportion %
0 - 1000	38	31
1001 - 2000	19	15
2001 - 5000	18	15
5001 - 10001	12	10
10001 - 20000	11	9
20000 - 50000	16	13
50001+	4	3
No response	6	5
<b>Total</b>	<b>124</b>	<b>100</b>

**Table 6.4 Business Response by type of premises**

Source: Bridgend County Borough Council

Type	No.
Office	85
Serviced Office	13
Industrial	47
Warehouse	34
Hi Tech / Lab	5
Site	19

- 6.6 Respondents were asked to comment if they were generally satisfied or unsatisfied with their current premises. Table 6.5 shows that the majority of companies (85%) are content with their current accommodation.
- 6.7 Of those 17 companies which stated that they were unsatisfied or very unsatisfied with their present premises, there was an opportunity to give reasons for this dissatisfaction. Approximately half of these stated that their present site / building were too small for the current operations or expansion plans. Other reasons quoted include: traffic congestion and parking, neighbouring tenants; the age of the premises; and high rates.

**Table 6.5 Satisfaction with current premises**

Source: Bridgend County Borough Council

Response	No.	Proportion %
Very Satisfied	43	35
Satisfied	62	50
Unsatisfied	15	12
Very Unsatisfied	2	2
No answer	2	2
<b>Total</b>	<b>124</b>	<b>100</b>

- 6.8 Respondents were also asked to indicate if they were considering moving premises within the next three years. Of the 124 companies responding, 34 stated that they are intending to relocate, 22 of which would be in the next 12 months.
- 6.9 All companies were asked to state the desired amount of floorspace they would like to occupy as well as the tenancy arrangements (freehold / leasehold) and the standard (basic / moderate / prestigious) of building. By adding the floorspace requirements together (netted against the release of the existing property, where appropriate, back into the market, it is possible to calculate a level of overall need.
- 6.10 The calculated level of overall need **based on the survey results alone** is **12,451- 28,149 sq m gross** of additional employment floorspace. This is shown by individual requirements in Table 6.7 below. Where no current space is stated this means that the required space is in addition to current premises. The resultant equivalent employment land requirements, when taking into account the net requirements and converting this to an equated land need (of approximately 3,902 sq m per hectare) gives a requirement of between **1.6** and **3.3** hectares of employment land for those businesses surveyed.

**Table 6.6 Property Requirements from business survey**

Source: Bridgend County Borough Council

	Net Floorspace Requirements	
	Minimum	Maximum
Floorspace (sq m)	6,039	13,006
Equated Land Need (Ha)	1.6	3.3

**Table 6.6 Property Requirements by Location and Type**

Source: Bridgend County Borough Council

Area Required	Current Size ft <sup>2</sup>	Required Size ft <sup>2</sup>	Additional?	Requirement	Tenure and Quality
Bridgend	0-1000	0-1000	No	Office / Business Park	Moderate Leasehold
	2001-5000	2001-5000	No	Office / Industrial / Warehouse	Prestigious Freehold
	0-1000	1001-2000	No	Office / Industrial	Basic Leasehold
		10001-20000	Yes	Industrial / Warehouse / Lab	Moderate Leasehold
	1001-2000	2001-5000	No	Office / Warehouse	Basic Freehold
		10001-20000	Yes	Industrial	Basic Freehold
	1001-2000	5001-10000	No	Warehouse / Lab	Basic / Moderate Freehold
	2001-5000	2001-5000	No	Office / Warehouse	Moderate Freehold
	10001-20000	20001-50000	No	Office / Industrial	Prestigious / Moderate Freehold / Leasehold
		0-1000	Yes	Office	Prestigious Freehold
	0-1000	1001-2000	No	Office / Industrial	Moderate Freehold
	1001-2000	2001-5000	No	Office / Warehouse	Moderate Leasehold
	1001-2000	2001-5000	No	Office	Basic Freehold
	1001-2000	2001-5000	No	Industrial	Prestigious Leasehold
	10001-20000	2001-5000	No	Office / Warehouse	Moderate Leasehold
	1001-2000	1001-2000	No	Office	Moderate Leasehold
	2001-5000	2001-5000	No	Industrial	Moderate Freehold
	5001-10000	10001-20000	No	Office / Warehouse	Basic / Moderate Freehold
		0-1000	Yes	Office / Lab	Moderate Freehold
	2001-5000	2001-5000	No	Industrial	Moderate Freehold
	0-1000	0-1000	No	Office	Prestigious Leasehold
	0-1000	1001-2000	No	Office	Moderate Leasehold
	20001-50000	20001-50000	No	Industrial	Moderate Freehold
<b>Bridgend TOTAL</b>	<b>59,014 - 139,000</b>	<b>97,019 - 227,000</b>			
Porthcawl	0-1000	1001-2000	No	Industrial	Basic Leasehold
<b>Porthcawl TOTAL</b>	<b>0-1,000</b>	<b>1,001-2,000</b>			
Maesteg	0-1000	0-1000	No	Office	Basic / Moderate Leasehold
	0-1000	1001-2000	No	Office / Industrial	Basic / Prestigious Leasehold
<b>Maesteg TOTAL</b>	<b>0-2,000</b>	<b>1,001 - 3000</b>			
Garw Valley	0-1000	0-1000	No	Office	Basic / Freehold
<b>Garw Valley TOTAL</b>	<b>0-1000</b>	<b>0-1000</b>			
Pyle / Kenfig Hill		5001-10000	Yes	High Tech	Moderate Freehold
	5001-10000	10001-20000	No	Office / Industrial	Moderate Freehold

		5001-10000	Yes	Not Stated	Moderate Freehold
	5001-10000	5001-10000	No	Industrial	Moderate Freehold
<b>Pyle / Kenfig Hill TOTAL</b>	<b>10,002 - 20,000</b>	<b>25,004 - 50,000</b>			
Valleys Gateway		10001-20000	Yes	Warehouse	Moderate Freehold / Leasehold
<b>Valleys Gateway TOTAL</b>		<b>10,001 - 20,000</b>			
<b>TOTAL</b>	<b>69,016 - 163,000</b>	<b>134,026 - 303,000</b>			

- 6.11 The requirement for new space tends to be for industrial and or warehouse units with ancillary office accommodation attached, although there are several requirements for solely office purposes. Size requirements are also very broad. There is also a mix of standard required; however the moderate category is favoured by the majority. The clearest result though has emerged is that the Bridgend sub area is the desired location where a company wishes to expand in or relocate to from elsewhere in the County Borough.
- 6.12 In terms of choosing a site, respondents were asked to state the most important factors when seeking alternative accommodation. 17 stated that location / accessibility was the most important; 8 said it was the particular site or its environment; 6 commented that parking was the most important aspect; and 5 said it was the cost.

#### Issues / Messages to take forward

- 6.13 In terms of drawing conclusions from this business survey it is important to remember that the trends identified here are for a small percentage of the business community based upon their current plans for a 3 year period. Therefore the absolute values derived for employment land take can not be seen as providing a wholly accurate picture of the potential need for employment land for *all* businesses in the County Borough for a period up to 2021. In addition, the survey could not take into account the needs of businesses wishing to locate into the County Borough.
- 6.14 Given this, the indicative survey results will not be used, as similar studies in the region have done, to calculate a short-term land supply requirement. It is clear that, when comparing the requirements in table 6.6 above with the current vacant properties identified in section 5 that there would be ample supply of existing buildings to meet this need.
- 6.15 Notwithstanding this, the information gained from the survey can be used to give a broad idea of the requirements of businesses in the future. These can be summarised as follows:
- ◆ The Bridgend sub area will be the most popular location for businesses to locate to or grow within;
  - ◆ Access and location will be the most important factors considered when choosing to grow or relocate a business;

- ◆ There will be a general requirement for both industrial and office premises; this reflects the comments from the property professionals; and
- ◆ The majority of companies will look for moderately classed standards of development; again, reflective of comments in the previous section.

6.16 The findings of the business survey will be taken forward and used in the qualitative assessment of future employment land supply undertaken in section 7 of this report.

## 7. Employment Land Projections

7.1 This chapter introduces various ways in which data and evidence gathered can be used to model and predict future employment land and premises projections.

7.2 This can be undertaken in both a qualitative and quantitative way and comprise the following techniques:

### Qualitative

- ◆ Broad assessment of future requirements taken from property market sources; and
- ◆ Assessment of likely requirements of local businesses taken from evidence in the business survey

### Quantitative

- ◆ Projections of historic take-up rates of employment land
- ◆ Forecasts using future population and economic activity rates (adapted UDP Method)
- ◆ Employment sector change forecasts

7.3 None of the above methods will provide a definitive answer and the outputs of the models would change depending on when they were carried out, however they do give indications of overall levels which need to be considered when assembling a new portfolio of sites. Where appropriate, the models take into account standard assumptions on employment densities and built floorspace associated with development land used by the South East (England) Regional Planning Conference.

## Qualitative Approaches

### *Assessment for Property Market Agents / Developers*

7.4 To reiterate, the findings from the comments made by property market professionals were as follows:

- ◆ Employment land should be released along the M4 corridor
- ◆ There are concerns regarding the viability of employment land in peripheral areas of the County Borough due to their ability to attract investment.
- ◆ There is a need to ensure that the labour and skills are in place to be part of an attractive package to promote the area and its available employment land.
- ◆ Focus should also be given to the delivery of smaller developments to attract SMEs and those developments which will appeal to those businesses looking to expand.

- ◆ Bridgend needs to maintain its consistent level of available sites to meet demand and that public sector agencies should respond appropriately to release sites.

### ***Assessment from local business survey***

7.5 To reiterate, the broad findings for employment land requirements from the business survey were as follows:

- ◆ The Bridgend sub area will be the most popular location for businesses to locate to or grow within;
- ◆ Access and location will be the most important factors considered when choosing to grow or relocate a business;
- ◆ There will be a requirement for both industrial and office premises, although the majority of requirements will be industrial
- ◆ The majority of companies will look for moderately classed standards of development although there will be some requirements for both prestigious and basic premises.

### **Quantitative Approaches**

#### ***Projections of historic take-up rates of employment land***

7.6 In examining the Council's employment land take-up rates from data extending back to 1999 it can be seen that there has been an average take-up of 6.33 hectares. Included in this are highs of over 16 hectares in the 2005/2006 period and a low of 1.69 hectares in 2008/2009. Whilst this could be attributed to the economic downturn it is worth highlighting the fact that these rates do not show a lot of consistency; for example in 2002/2003 only 2.62 hectares was developed, whilst in 2003/2004 this jumped to 10.5 hectares.

7.7 Taking this average take up on for the rest of the Plan period (see Table 7.1), as well as factoring in that employment land already developed since 2006, there would be an LDP requirement of approximately **88.5** hectares to 2021.

**Table 7.1 Summary Employment Land Supply Based on past development rates**

<b>Annual Average Employment Land Development 2000 - 2009 (Ha)</b>	<b>Projected LDP Requirement 2009 - 2021 using past average (Ha)</b>	<b>Projected LDP Requirement + Take Up Since 2006</b>
<b>6.33</b>	<b>75.96</b>	<b>88.45</b>



### **Forecasts using future population and economic activity rates**

7.8 The second model is similar to that used in the calculation of the UDP employment land supply; however it has been adapted to suit up-to-date statistical data sets. The model is based upon population estimates up to 2021 agreed by the Council and uses the change in economically active persons over that time. It also uses data from Nomis to estimate those economically active persons who are unemployed and those economically inactive who want a job; these are then factored into the calculations. (See Table 7.2)

**Table 7.2 Population Forecast Data**

Working Age Population			Change in Economically Active	Change after out-commuting	No. of Economically Active Persons Unemployed	Change after out-commuting	Average No. of economically inactive who want a job	Change after out-commuting
2006	2021	Change 06-21	2006-2021	2006-2001	June 2009	June 2009	2004-2009	
80,800	83,300	2,500	1,945	1,381	5,700	4,047	5,522	3,921

7.9 Analysis of these supply-led forecasts involves the following assumptions:

- Assumes labour supply is the sum of all people between 15 and 64
- Constant economic activity rate of 77.8% of working age population
- Employment density rates remain constant
- Constant out commuting rate of 29%
- 40% ratio floorspace to plot size

7.10 Using these assumptions, the number of economically active after out-commuting (1,381) together with those wishing to find a job (3,921 after out-commuting) can be equated to a land needs using the following further assumptions:

- The proportion of people working in each industry sector remains constant
- Industry sector spaces remains constant
- Employment space uses are consistent with neighbouring authority studies. For Bridgend data has been obtained from the Vale of Glamorgan Employment Land Study which is quoted as using the South East Regional Planning Conferences "The Use of Business Space"

7.11 Tables 7.3 - 7.5 show the current distribution of employment between business sector together with the implications for floorspace need based upon the three scenarios of meeting the demand created by a rise in the number of economically active persons; created by a desire

to reduce the number of unemployed to zero; and that created by wishing to reduce the number of economically inactive who want job to zero. The total need is calculated by adding the three resultant land need figures together; this equates to **45.83** hectares over the LDP Period.

**Table 7.3 Employment land supply required to meet additional economically active persons**

Source: Bridgend County Borough Council

<b>Bridgend</b>	<b>2009 Proportion of Workforce</b>	<b>Proportion of Workforce Occupying B1, B2 and B8 floorspace</b>	<b>Average Floorspace / person</b>	<b>Floorspace Requirement (sq m)</b>
Agriculture	1	5	21	14
Electricity, Water & Gas, Mining and Quarrying	0.5	5	21	7
Manufacturing	16	100	41.1	9,081
Construction	9	26	21	679
Distribution	22	48	67.4	9,829
Transport	3	48	67.4	1,340
Financial and Business Services	13	100	21	3,770
Government and Other Services	37	22	21	2,361
			<b>TOTAL</b>	<b>27,081 sq m</b>
			<b>Equates to</b>	<b>6.77 Ha</b>

**Table 7.4 Employment land supply required to reduce economically active (Unemployed) to zero**

Source: Bridgend County Borough Council

<b>Bridgend</b>	<b>2009 Proportion of Workforce</b>	<b>Proportion of Workforce Occupying B1, B2 and B8 floorspace</b>	<b>Average Floorspace / person</b>	<b>Floorspace Requirement (sq m)</b>
Agriculture	1	5	21	42
Electricity, Water & Gas, Mining and Quarrying	0.5	5	21	21
Manufacturing	16	100	41.1	26,613
Construction	9	26	21	1,989
Distribution	22	48	67.4	28,804
Transport	3	48	67.4	3,928
Financial and Business Services	13	100	21	11,048
Government and Other Services	37	22	21	6,918
			<b>TOTAL</b>	<b>79,364sq m</b>
			<b>Equates to</b>	<b>19.84 Ha</b>

**Table 7.5 Employment land supply required to reduce economic inactive (who want to work) to zero**

Source: Bridgend County Borough Council

<b>Bridgend</b>	<b>2009 Proportion of Workforce</b>	<b>Proportion of Workforce Occupying B1, B2 and B8 floorspace</b>	<b>Average Floorspace / person</b>	<b>Floorspace Requirement (sq m)</b>
Agriculture	1	5	21	41
Electricity, Water & Gas, Mining and Quarrying	0.5	5	21	21
Manufacturing	16	100	41	25,782
Construction	9	26	21	1,927
Distribution	22	48	67	27,905
Transport	3	48	67	3,805
Financial and Business Services	13	100	21	10,703
Government and Other Services	37	22	21	6,702
			<b>TOTAL</b>	<b>76,885 sq m</b>
			<b>Equates to</b>	<b>19.22 Ha</b>

**Employment sector change forecasts**

7.12 The third qualitative model involves examining employment sector change forecasts. The most recent forecasts have been supplied by Cambridge Econometrics as part of *Examining Alternative Demographic and Labour Market Projections* (May 2010). These forecasts are outlined in Table 7.5 below and their resultant need in land supply is calculated similar to those above. These calculations are displayed in Table 7.6.

**Table 7.5 Employment Forecasts 2006 – 2021**

Source: Cambridge Econometrics

	<b>Thousands</b>				<b>Growth, 2006-21 (Thousands)</b>
	<b>2000</b>	<b>2006</b>	<b>2012</b>	<b>2021</b>	
<b>Agriculture etc</b>	0.3	0.4	0.3	0.3	-0.1
<b>Mining &amp; quarrying</b>	0.1	0.2	0.1	0.1	-0.1
<b>Manufacturing</b>	12.4	10.1	9.3	8.5	-1.6
<b>Electricity, gas &amp; water</b>	0	0.1	0	0	-0.1
<b>Construction</b>	2.7	5.7	3.6	3.9	-1.8
<b>Distrib, hotels &amp; catering</b>	12.5	13.6	12.5	13.6	0
<b>Transport &amp; communications</b>	1.8	1.8	2	2.1	0.3
<b>Financial &amp; business services</b>	5.4	7.9	9.6	11.1	3.2
<b>Government &amp; other services</b>	19.8	23.3	22.4	22.9	-0.4
<b>Total</b>	<b>55.1</b>	<b>63</b>	<b>60</b>	<b>62.4</b>	<b>-0.6</b>

**Table 7.6 Employment Land Supply Requirements**

Source: Bridgend County Borough Council

Bridgend	Change in Workforce 2006 - 2021	Proportion of Workforce Occupying B1, B2 and B8 floorspace	Average Floorspace / person	Floorspace Requirement (sq m)	Land Requirement (Ha)
Agriculture	-100	5	21	-105	-0.03
Electricity, Water & Gas, Mining and Quarrying	-200	5	21	-210	-0.05
Manufacturing	-1,600	100	41.1	-65,760	-16.44
Construction	-1,800	26	21	-9,828	-2.46
Distribution	0	48	67.4	0	0.00
Transport	300	48	67.4	9,706	2.43
Financial and Business Services	3,200	100	21	67,200	16.80
Government and Other Services	-400	22	21	-1,848	-0.46
			<b>NET TOTAL</b>	<b>-845.4</b>	<b>-0.21</b>

7.13 Therefore, using recently supplied employment change forecasts a **negative** requirement of **0.21** hectares has been calculated. However, when examining the individual sectors it is clear that the land use requirements for 16.8 hectares of finance and business space should not easily be discounted against a negative requirement of 16.44 hectares of manufacturing floorspace.

#### Conclusions to Take Forward: Which Model to Use?

7.14 In summary therefore, the quantitative projections range from a negative requirement of 0.21 hectares to 88.5 hectares of employment land required over the LDP Plan period up to 2021.

7.15 In terms of choosing an accurate model to reflect future requirement, the employment sector forecast model, which returned a negative result, would appear to be undermined by the fact that, already in the LDP period from 2006, some 12.49 hectares of allocated employment land has been developed. However, the model does provide a useful guide as to the type of future development required; a continued shift away from B2 manufacturing operations to B1 financial and business service operations.

7.16 The change in these projections based on the economic situation can be quite stark, as demonstrated in the difference between the figures used and those included in the LDP Pre Deposit Proposals. It could therefore not be considered to be reliable when assessing employment land supply over a 15 year period, as well as making decisions to safeguard land for even longer time-scales.

- 7.17 The population-based forecasts give very specific floorspace amounts based on the changes in the workforce. However this does not take into account sectoral change and could be considered to be inflexible when assessing future requirements. It is, however, a tried and tested model which has been used over successive Development Plans to calculate future need.
- 7.18 The trend-based projection, taking into account development over a 10 year period and carrying this forward gives a good indication of how employment land can be developed in periods of economic prosperity and down-turn. It also accommodates those years where large-scale developments take place (for example at strategic sites) and those when activity is quieter. It is, however, a very crude way of assessing future need. Notwithstanding this, perhaps this wider, broader way of predicting future need is a more appropriate way of accommodating future development in a period of economic uncertainty. Unlike the other models, by using past development rates, this calculation method could effectively be seen as taking into account those companies which will occupy existing premises which are currently vacant.
- 7.19 For these reasons, it is therefore considered that using past development rates more accurately reflects the future employment land requirements of the County Borough. It is important to stress that this figure is an illustration of the **need** for vacant employment land. The **supply** portfolio of vacant land, as confirmed in the LDP, will need to ensure that it offers a range and choice of sites which are flexible enough to meet the development need wherever it arises and if it is derived from the market or is a policy-led initiative.
- 7.20 This report now moves into its third and final stage where existing and potential employment sites are assessed against the background of the qualitative and quantitative need discussed in this stage together with existing and proposed strategic planning policies.

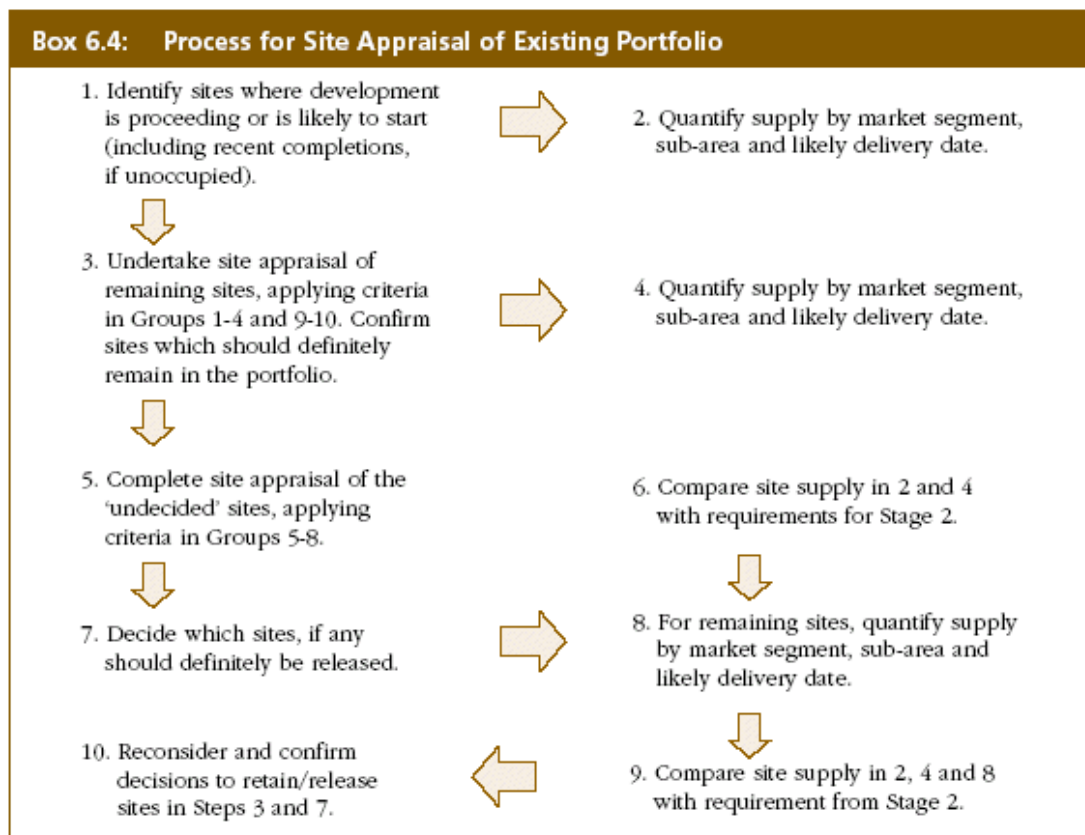
## STAGE THREE – IDENTIFYING A ‘NEW’ PORTFOLIO OF SITES

### 8. Assessment of existing and potential new Employment Sites

8.1 The 2004 Best Practice guide gives a step-by-step process for the third and final stage of an employment land review. This is replicated below at Figure 8.1. The purpose of this chapter will be to follow this process through, with appropriate variations, to establish recommendations for the final portfolio of employment sites for the LDP.

#### Figure 8.1: Three Stage Process for Employment Land Reviews

Source: Employment Land Review: Guidance Note, ODPM (2004)



#### Steps 1 and 2: Identify Sites where development is proceeding or likely to start and quantify supply

8.2 These first steps involve bringing forward those employment sites which are already fully-occupied or those which are established sites which have vacant land remaining in them which have not been subject to reassessment. These are outlined in table 8.1 below by LDP sub area.

8.3 When examining this table it is clear that, just by taking these sites into account, there is a total quantitative supply by far in excess of the identified need outlined in section 7. However, by looking at the spatial

**Table 8.1 Quantitative and Spatial Assessment of confirmed employment sites**

Employment Site	Total Area	Remaining Vacant Area
<b>Bridgend Sub Area</b>		
Bridgend Industrial Estate	127.61	8.9
Bridgend Science Park	11.84	1
Brocastle, Waterton	52.13	46.3
Coychurch Yard Bridgend	2.75	0.3
Crosby Yard Bridgend	1.3	0.1
Ravens Court, Tondy Rd	0.53	0
Island Farm Bridgend	26	11.5
Litchard Industrial Estate	5.95	0.5
Mackworth Road, Bridgend	0.17	0
Penybont Industrial Estate	0.71	0
SWALEC Depot, Tremains Road	0.5	0
Trews Field Bridgend	5.08	0
Waterton Industrial Estate	124.6	12.6
<b>BRIDGEND SUB AREA TOTAL</b>	<b>359.17</b>	<b>81.2</b>
<b>Llynfi Valley Sub Area</b>		
Forge Industrial Estate	4.97	0
Georgia Pacific	20.98	2.2
Heol Ty Gwyn Maesteg	5.6	0.2
Spelter Maesteg	2.5	0
<b>LLYNFI VALLEY SUB AREA TOTAL</b>	<b>34.05</b>	<b>2.4</b>
<b>Ogmore Valley Sub Area</b>		
Penllwyngwent Ogmore Vale	11.85	4.9
<b>OGMORE VALLEY SUB AREA TOTAL</b>	<b>11.85</b>	<b>4.9</b>
<b>Garw Valley Sub Area</b>		
Ffaldau Industrial Estate	3.27	0.1
Green Meadow Llangeinor	3.84	0
<b>GAW VALLEY SUB AREA TOTAL</b>	<b>7.11</b>	<b>0.1</b>
<b>Valleys Gateway Sub Area</b>		
Abergarw Industrial Estate	9.23	3
Enterprise Centre Tondy	1.96	0
<b>VALLEYS GATEWAY SUB AREA TOTAL</b>	<b>11.19</b>	<b>3</b>
<b>Pyle / Kenfig Hill / Cornelly Sub Area</b>		
Bairdwear Factory, Pyle	0.99	0
South Cornelly	4.19	0
Ty Draw Farm, Pyle	6.04	6.1
Village Farm Industrial Estate Pyle	45.8	4.4
<b>PYLE / KENFIG HILL / CORNELLY SUB AREA TOTAL</b>	<b>57.02</b>	<b>10.5</b>
<b>Porthcawl Sub Area</b>		
Glan Road Porthcawl	0.27	0
Pwll y Waun	0.7	0.7
<b>PORTHCAWL SUB AREA TOTAL</b>	<b>0.97</b>	<b>0.7</b>
<b>Pencoed Sub Area</b>		
Land S.W.of Sony Technology Pk.	3.61	0
The Triangle Site Pencoed	10.19	1
Pencoed Technology Park	30.57	5.4
<b>PENCOED SUB AREA TOTAL</b>	<b>44.37</b>	<b>6.4</b>
<b>TOTAL</b>	<b>481.36</b>	<b>109.2</b>



breakdown it is clear that the supply is not uniform in all areas of the County Borough and may not accord with policy aspirations.

- 8.4 In the Bridgend sub area, total supply is 81.2 hectares. However, over half of this relies on the deliverability of the Brocastle site and there is doubt if the Island Farm site will be delivered in its entirety pending the outcome of the submitted planning application. This brings the short term / immediate supply figure down to 23.4 hectares.
- 8.5 Elsewhere, it is clear that the Llynfi Valley and Valleys Gateway will be providing a minimal amount of vacant employment land; 2.4 and 3 hectares respectively. This would not appear to be conducive with the LDP Strategy of accommodating new growth within these areas. In order to create balanced communities there will be a need to ensure a supply of readily developable employment land in these areas. The Valleys Gateway also has the strategic advantage of being located along the M4 corridor which will also make developing land for employment purposes here attractive.
- 8.6 As mentioned previously, the Porthcawl sub area suffers from a severe lack of vacant employment land, however, this is off-set by a supply in the adjacent Pyle / Kenfig Hill / Cornelly sub area (containing the Ty Draw Farm strategic site). These settlements are seen as being linked by the Wales Spatial Plan.

### **Steps 3 – 10: Identify Site appraisals of remaining sites and quantify potential supply**

- 8.7 The second stage in this process is to identify those sites which were earmarked for reassessment or de-allocation in the initial assessment and undertake a site appraisal for each one to determine their suitability to be carried forward. As all of these sites are existing allocations, some with development already on them, it is not considered appropriate to undertake a full assessment as identified in the best practice guide. However, the issues relating to environment, access, market conditions, ownership, constraints, and policy considerations will be discussed. In this assessment the key messages and issues highlighted at the end of each section will be taken into account.
- 8.8 The 16 sites which were to be reassessed or released are considered again below, with a final recommendation as to their inclusion or exclusion in the final portfolio. Most of the sites subject to reassessment for example, mixed uses, may not include a definitive figure as to the amount of vacant employment land that will be given to the supply list.

**Brackla Industrial Estate**

This is an existing employment site which is the subject of a Development Brief which is likely to be approved by the time the LDP is adopted. Of this, an estimated 14 hectares of employment land will remain to be developed. This site is within the urban area of Bridgend and yet is directly accessible to the M4 along the A4061. It has proved attractive to developers in recent years when plots have been released for development. It is owned by the Welsh Assembly Government who is committed to delivering the Development Brief; it also lies within the Bridgend Strategic Regeneration Growth Area (SRGA) as identified in the LDP. The development of the area subject to the Development Brief will also help to uplift the quality of the existing estate which is in a generally poor condition and requires further investment.

**Recommendation: Include site in portfolio with approximately 14 hectares vacant.**

**Bryncethin Depot**

The current depot use of the site is not considered to be attractive and, given its small scale nature is not considered attractive for employment redevelopment purposes. The site is likely to become redundant during the LDP period and, due to its good relationship with the urban area of Bryncethin, would be ideally suited for a number of uses including residential, recreation and retailing particularly in conjunction with other vacant land to the north. Given this, it would seem advisable to de-allocate the site for employment purposes but keep it within the settlement boundary of Bryncethin. Whilst this will decrease the overall employment land supply in the Valleys Gateway it will have no impact on the availability of vacant land.

**Recommendation: De-allocate the site for employment purposes and remove from employment portfolio.**

**Brynmenyn Industrial Estate**

The main area associated with Brynmenyn Industrial Estate has a good environmental standard and access which has led to encouraging levels of development in recent years. However, the closure of the former Christie Tyler premises on a discreet, separately accessed, part of the wider allocation presents an opportunity to reconsider the site for alternative uses. The residential / commercial areas subject to a current planning application will facilitate the future development of currently vacant employment land. The result will be a viable mixed use scheme which will not result in a net loss of vacant employment land.

**Recommendation: Continue the allocation of the main part of the Industrial Estate for employment (mainly industrial) purposes. Consider the reallocation of the Christie Tyler site for mixed use purposes including employment.**

**Coegnant, Maesteg**

This site, at the top of the Llynfi Valley is considered too far from the M4 to attract market-led development. However, given its public ownership (BCBC) and location in one of the most economically deprived areas of the County Borough, the Western Valleys SRA and an LDP SRGA, it is vital that an element of employment development (albeit smaller than what is currently allocated) is retained in any future proposals. A mix of uses on the site could facilitate new employment development within the wider area. It is considered that the appropriate Masterplanning of this site (and an adjacent site to the south) could identify approximately 2 hectares of employment uses and opportunities (such as cross-subsidy in the form of other uses) which will make development viable here.

**Recommendation: Reallocate the site as a mixed use site; the employment development element of which is likely to be approximately 2 hectares.**

**Coity Sidings, Bridgend**

The area of employment land forms part of a larger site owned by the British Railways (Residuary) Board who have recently commissioned consultants to develop a framework Development Brief in consultation with the Local Planning Authority. Due to its location within the urban area a number of different uses may be considered acceptable including residential, small-scale retail and leisure as well as employment. A critical output of the future development of this site is the Park and Ride facility for Wildmill Train Station. Given this, together with the known contamination levels of the site and the proximity of other nearby employment sites (including Brackla Industrial Estate) it is not considered that the remaining vacant land should be developed for employment purposes. However, the existing employment use within the site should be protected.

**Recommendation: Reallocate the site as a mixed use site; including the delivery of the Park and Ride Facility. Existing employment uses should remain.**

**Coity Road, Bridgend**

The site has planning permission for residential development. It is therefore considered that it is unlikely to come forward for employment development.

**Recommendation: De-allocate land from employment uses**

**Coronation Works, Evanstown**

This site has remained unoccupied in its current form for at least the past 5 years. It has not been identified as a site which the Council is looking to assist in bringing forward for employment purposes and is not in public ownership. It is, however, in one of most economically deprived areas of the County Borough. Given its distance from other employment markets, locally based employment development should be considered. However it is considered that its release for other uses could facilitate employment generation on a wider area of land, subject to an alteration of the settlement boundary of Evanstown.

**Recommendation: Reallocate the site, subject to a settlement boundary review, as a mixed use which will facilitate locally based employment uses.**

**Ewenny Industrial Estate / Mid Glamorgan Depot**

These sites together are known as Parc Afon Ewenni and the Council are part-owners of this large site. A Masterplan for the area is to be prepared which will also consider other uses which could make employment development viable. The site is strategically placed being a short distance from the Motorway and also lies within the Bridgend SRGA. Whilst the redevelopment of this site will not impact on employment land availability in the short term, there is potential for this major site, if redeveloped, to significantly affect the employment property market across the County Borough. This impact will not only be the release of this land, but potentially on other employment land which may be needed to accommodate uses which are displaced by new development.

**Recommendation: Reallocate the site as a mixed use site; the employment development element of which to be confirmed in a development brief.**

**Ewenny Road, Maesteg**

Formerly occupied by a number of large and well known industries, including Budelpak Cosi, the whole of this site is now vacant. As part of the Western Valleys Strategic Regeneration Area project process, a number of strategic project themes have been created including 'Employment Sites' where each local authority was given the opportunity to identify sites where projects were proposed/ deliverable that could be funded by the Western Valleys programme. This site has been identified as serving the Llynfi Valley. The Council as part-landowner is looking to bring forward a Development Brief for the site which will facilitate new employment uses as part of a wider mixed uses development to bolster the local economy.

**Recommendation: Reallocate the site as a mixed use site; the employment development element of which is to be confirmed in a development brief.**

**Isfryn Industrial Estate**

The remaining vacant employment land is in the ownership of a house builder who has tried for a number of years to gain residential planning permission on the site. The latest application before the Local Planning Authority for the vacant land is for a mixed use development comprising 43 residential units work units and enterprise / community centre. Should this application be approved its status would need to be reflected in the employment land supply.

**Recommendation: Await the outcome of the pending planning application on the site and reallocate the area as a mixed use site as appropriate if necessary.**

**Land at Heol y Splott**

This land was first designated in the Bridgend Unitary Development Plan for employment development. However, despite the fact that this site is allocated, and the adjacent South Cornelly Industrial Estate has no vacant land remaining, no real interest in developing the site for employment purposes has been shown. It is also not in an area of growth as identified in the LDP. It was, however, identified in the LDP Strategy to potentially accommodate a waste management site. In releasing this site from employment uses, it is therefore considered appropriate to allocate it for waste-related development.

**Recommendation: De allocate the site for employment purposes and consider allocating for waste management uses as per the LDP Strategy.**

**Land at Tondu**

The site is strategically located in close proximity to the mouths of the three Bridgend valleys and in close proximity to the Valleys Gateway conurbation and the main urban settlement of Bridgend. The northern plateau, where the vacant employment land remains, has had little developer interest to date. Given the sites position within the Valleys Gateway SRGA with relative proximity to the Motorway it is considered there could be potential for market-led development here. However, it is pertinent to review the uses allocated for the site with a view to bringing a mixed use development forward which could include an element of employment development. The amount of employment land required from this development should be in the region of 2 hectares.

**Recommendation: Reallocate the site as a mixed use site; retaining approximately 2 hectares of employment land to be confirmed in a development brief / planning application.**

**Llynfi Power Station**

The site has been allocated for employment purposes for a considerable amount of time. The only development interest for the site has been to develop part of the allocated area for a Biomass power regeneration plant, which now has consent and includes road access improvements. Whilst acknowledging this position, the site still remains unattractive for mainstream employment purposes, not least due to its remoteness from settlement areas and strategic transport routes. Therefore it seems pertinent to release the site from employment use, and to examine the potential to allocate the site for energy-generation related development in the LDP.

**Recommendation: De-allocate the site for employment purposes and consider allocating for energy generation uses as per the extant planning consent.**

#### **Maesteg Washery**

The employment element of this scheme has always been a complementary and minor element of any proposals. The site also has significant constraints in terms of the deliverability of employment uses on it. Given the scope for other employment land on designated sites known to be made available in the area (including the former Budelpak Cosi site), and difficult market conditions, it appears sensible to release this land from its employment allocation.

**Recommendation: De-allocate the site for employment purposes.**

#### **Wern Tarw**

The remaining area of land to the west of the site was originally allocated to enable the expansion of the Rockwool plant in the future. It is designated as a Site of Importance for Nature Conservation (SINC). The vacant land which remains allocated for future expansion of the Rockwool plant has not been the subject of any development interest in recent years. The majority of the development activity which has taken place recently has been within the existing development footprint of the site. It is therefore considered preferable that, rather than leave almost 9 hectares of vacant employment land on the schedule with little prospect of it being developed; it is sensible to see this land 'returned' to a countryside designation.

**Recommendation: De-allocate the site for employment purposes**

- 8.9 The resultant effects of these recommendations on future vacant land supply is summarised in table 8.2 below.
- 8.10 From this table it is clear that the reassessed sites make a significant contribution to the employment land supply. There is also the prospect of further vacant land coming forward as a result of redevelopment exercises such as at Parc Afon Ewenni and Ewenny Road, Maesteg. Other sites may see a reduction in their available land through Masterplan and Development Brief exercises, such as Coegnant.
- 8.11 The total indicative supply figure is now approx 140 hectares which is well in excess of the need identified in the previous chapter. However it is in-line with the range identified within the LDP Preferred Strategy of supplying between 160 -170 hectares of land for employment development over the Plan period, albeit that figures relate to 2009 rather than 2006.
- 8.12 The supply in Bridgend has been strengthened by this assessment as well as the Valleys Gateway. However, the Llynfi Valley still appears to be relying on two sites where development will not be forthcoming in the immediate / short term. There is also scope to potentially increase the supply in the Garw and Ogmere Valleys and Pyle / Kenfig Hill to

meet local demand. The scope for further land to be included in the supply will be considered below.

**Table 8.2 Vacant Employment Land after reassessment of sites**

Employment Site	Remaining Vacant Area
<b>Bridgend Sub Area Supply from Table 8.1</b>	<b>81.2</b>
Brackla Industrial Estate	14 *
Coity Sidings, Bridgend	0 *
Parc Afon Ewenni	0 *
<b>BRIDGEND SUB AREA TOTAL</b>	<b>95.2 *</b>
<b>Llynfi Valley Sub Area Supply from Table 8.1</b>	<b>2.4</b>
Coegnant	2 *
Ewenny Road, Maesteg	0 *
<b>LLYNFI VALLEY SUB AREA TOTAL</b>	<b>4.4 *</b>
<b>Ogmore Valley Sub Area Supply from Table 8.1</b>	<b>4.9</b>
Coronation Works, Evanstown	0 *
Isfryn Industrial Estate	0.9 *
<b>OGMORE VALLEY SUB AREA TOTAL</b>	<b>5.8 *</b>
<b>Garw Valley Sub Area Supply from Table 8.1</b>	<b>0.1</b>
<b>GAW VALLEY SUB AREA TOTAL</b>	<b>0.1</b>
<b>Valleys Gateway Sub Area Supply from Table 8.1</b>	<b>3</b>
Brynmenyn Industrial Estate	9.5
Land at Tondu	2*
<b>VALLEYS GATEWAY SUB AREA TOTAL</b>	<b>14.5*</b>
<b>Pyle / Kenfig Hill / Cornelly Sub Area Supply from Table 8.1</b>	<b>10.5</b>
<b>PYLE / KENFIG HILL / CORNELLY SUB AREA TOTAL</b>	<b>10.5</b>
<b>Porthcawl Sub Area Supply from Table 8.1</b>	<b>0.7</b>
<b>PORTHCAWL SUB AREA TOTAL</b>	<b>0.7</b>
<b>Pencoed Sub Area Supply from Table 8.1</b>	<b>6.4</b>
<b>PENCOED SUB AREA TOTAL</b>	<b>6.4</b>
<b>TOTAL</b>	<b>137.6*</b>
* = indicates that this amount is subject to change and confirmation following masterplanning exercises etc.	

8.13 The final contribution of these reassessed sites will be confirmed by way of allocation in the deposit Local Development Plan, this will additionally be subject to Strategic Environmental Assessment (SEA) and consultation which may impact on the designation of sites.

#### **Additional Sites to be brought forward: Candidate Sites**

8.14 The final part of this stage of the review examines the potential of new sites to contribute to the employment land supply.

8.15 Between the November 2006 and the January 2007 the Council called for Candidate Sites to be nominated for potential allocation in the emerging LDP. A variety of sites were put forward for consideration which included pure employment uses as well as mixed-use sites which included an element of employment use.



- 8.16 The Council will be undertaking a separate, Candidate Site assessment procedure, prior to allocating sites (this is in addition to any SEA / consultation undertaken on the allocations in the LDP). It is not for this report to pre-judge the outcome of that process; however it can give an indication as to the contribution which these sites can make to the overall employment land supply. Many of the sites submitted have already been referenced above and the submissions sought to reinforce an existing allocation. This is reassuring as it demonstrates a commitment on behalf of the owner / public bodies to assist in bringing forward development on the site during the LDP plan period.

<b>Candidate Sites Already Considered</b>	
<b>Reference Number</b>	<b>Location</b>
264.B1 / 804.B1	Field at Island Farm
802.B2 / 142.B1	Police Site at Waterton Cross (to be considered as part of Parc Afon Ewenni Masterplan)
825.B2	Brocastle
825.B6	Waterton (South East)
825.B7	Waterton (West) – Ewenny Park
825.B3	Pencoed Technology Park
825.B5	Ty Draw Farm
772.B1 / 802.B3	Land West of Maesteg Road, Tondu
802.B5	Coity Sidings, Bridgend
857.B8	Rear of Laing Street, Village Farm, Pyle
857.B36	Aber Fields, Nantymoel ( including Penllwyngwent IE)

- 8.17 8 sites were additionally recommended for employment uses during the process. These are considered individually below solely on the basis of the need for the site in employment terms so as not to prejudice the outcome of the assessment process.

<b>824.B3 Land at Old Tondu Road, Bridgend – 0.9 hectares</b>
<b>Industrial / Residential / Energy Generation</b>
This undeveloped site lies just outside the current settlement boundary of Bridgend. As seen above, the Bridgend sub area has a good supply of employment land and so a further allocation of land for this purpose is not required. This additionally does not fall with the Bridgend SRGA and so is not required for strategic growth purposes.
<b>Recommendation: Site is not required for employment purposes</b>

**857.B14 Llangeinor Pool and Recreation Ground – 4.3 hectares****Residential / Recreation / Employment**

This site currently lies outside of the settlement boundary of Llangeinor, albeit that part of the site is brownfield in nature. The Garw valley does have a shortage of vacant employment land, as evidenced above. However, Llangeinor itself is only approximately 1 mile from Abergarw and Brynmenyn Industrial Estates located in the Valleys Gateway sub area. Therefore with the plentiful supply of land available here, within the SRGA, it would not seem ideal to allocate a potentially new competing site such a short distance away.

**Recommendation: Site is not desirable for employment purposes.**

**857.B55 Brewery RFC Field – 2.4 hectares****B1 / Residential / Retail**

This site which currently accommodates the Brewery Field, lies just but immediately adjacent to the current Bridgend Town Centre boundary. It is understood that this site is currently being examined as part of an extension to the town centre as part of the Bridgend Masterplan. The site could ideally accommodate new B1 office development which would benefit from an edge / town centre location, similar to the adjacent Ravenscourt development. This site, if developed for employment purposes could assist in strengthening the town centres non-retail employment base.

**Recommendation: Consider for employment uses subject to the outcome of the Bridgend Masterplan exercise**

**857.B56 Spelter, Nantyffyllon – 1.3 hectares****Residential / Employment**

This Council owned site is currently allotment land and is allocated for educational purposes in the UDP. Even though this site is located in the Upper Llynfi Valley, where there is a high need for new employment land which can be developed in the short term, given the close proximity of the Coegnant site and the fact that investment in the Llynfi Valley will be focussed elsewhere (most notably on the former Budelpak COSi site) it is considered that this site will not be viable in the short to medium term and should not be allocated for employment purposes.

**Recommendation: Site is not desirable for employment purposes at this time.**

<b>797.B1 / 802.B1 / 844.B1 Sarn Park Services and adjacent land at Ty Risha Farm – circa 8.3 hectares</b>
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<b>Employment / Offices / Bulky Goods Retail / Commercial</b>
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<p>These sites, part of which is currently used as a Motorway Service Area (MSA) are strategically placed along the M4. Subject to the issues surrounding the current use of the site being resolved (ie the need for the MSA or its incorporation into a redeveloped scheme) then this site together with adjacent land would be an ideal location for an office business park. Located in an area of future growth in the Valleys Gateway SRGA, this redeveloped and possibly extended site, because of its particular location, could also make an important contribution to the strategic employment land supply for the whole of Bridgend County Borough.</p>
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<b>Recommendation: Consider allocation of site for employment purposes, subject to the resolution of other issues.</b>
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<b>868.B3 Adjacent to Crosby Yard – 1.2 hectares</b>
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<b>Industrial Uses</b>
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<p>This site, which is currently owned by Network Rail, could provide a useful extension to the existing Crosby Yard employment area. However, the site is constrained both in terms of its access and boundaries which would need to be confirmed by the Candidate Site Assessment Process. Lying outside the Bridgend SRGA, but within the urban area of Bridgend, this site is relatively close to the Wildmill Communities First area which may benefit from the provision of nearby employment land and premises, particularly for smaller enterprises. The relationship of this site to the nearby Coity Sidings scheme would need to be established to ensure that an over-supply of such land was not allocated in the area.</p>
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<b>Recommendation: Consider allocation of site for employment purposes, subject to the resolution of other issues.</b>
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<b>857.B60 Land adjoining Heol Ty Gwyn Industrial Estate – 3.7 hectares</b>
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<b>B2 and Employment</b>
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<p>This Council owned site is currently outside of the settlement boundary of Maesteg. The area of land could become a useful extension to the existing, popular Heol Ty Gwyn Industrial Estate and complement the nearby Civic Amenity site. Located in the Llynfi Valley, where there is a need for new employment land which can be developed in the short term, this area of land could boost the supply significantly if developed in a way which was attractive to local markets. Located in the Western Valleys SRA and the Llynfi Valley SRGA the relationship of this site to other schemes in Maesteg (notably the former Budelpak COSi site) would need to be established.</p>
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<b>Recommendation: Consider allocation of site for employment (mainly industrial) purposes, subject to the resolution of other issues.</b>
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<b>814.B2 Dunraven House, Stormy Down – 3.1 hectares</b>
<b>Manufacturing and Distribution</b>
This site is adjacent to an existing employment allocation and has been submitted to facilitate the growth of a firm which is constrained by its existing premises. Whilst the site is not in an area of growth identified in the LDP it contains a well-established business which employs a significant number of workers and could, given its location on the A48, potentially provide further employment opportunities for both the Porthcawl and Pyle / Kenfig Hill / Cornelly sub areas. Safe access to this site will be a key consideration and therefore the outcome of the Candidate Site assessment process will be key in deciding the future of this site.
<b>Recommendation: Consider allocation of site for employment purposes, subject to the resolution of other issues.</b>

8.18 The resultant effects of these recommendations on future vacant land supply is summarised in table 8.3 below.

**Table 8.3 Vacant Employment Land after assessment of Candidate Sites**

Employment Site	Remaining Vacant Area
<b>Bridgend Sub Area Supply from Table 8.2</b>	<b>95.2 *</b>
Crosby Yard	1.2
<b>BRIDGEND SUB AREA TOTAL</b>	<b>96.4 *</b>
<b>Llynfi Valley Sub Area Supply from Table 8.2</b>	<b>4.4 *</b>
Extension to Heol Ty Gwyn Industrial Estate	3.7
<b>LLYNFI VALLEY SUB AREA TOTAL</b>	<b>8.1 *</b>
<b>Ogmore Valley Sub Area Supply from Table 8.2</b>	<b>5.8 *</b>
<b>OGMORE VALLEY SUB AREA TOTAL</b>	<b>5.8 *</b>
<b>Garw Valley Sub Area Supply from Table 8.2</b>	<b>0.1</b>
<b>GAW VALLEY SUB AREA TOTAL</b>	<b>0.1</b>
<b>Valleys Gateway Sub Area Supply from Table 8.2</b>	<b>14.5</b>
Sarn Park MSA and adjacent land	8.3 *
<b>VALLEYS GATEWAY SUB AREA TOTAL</b>	<b>22.8 *</b>
<b>Pyle / Kenfig Hill / Cornelly Sub Area Supply from Table 8.2</b>	<b>10.5</b>
Dunraven House, Stormy Down	3.1
<b>PYLE / KENFIG HILL / CORNELLY SUB AREA TOTAL</b>	<b>13.6</b>
<b>Porthcawl Sub Area Supply from Table 8.2</b>	<b>0.7</b>
<b>PORTHCRAWL SUB AREA TOTAL</b>	<b>0.7</b>
<b>Pencoed Sub Area Supply from Table 8.2</b>	<b>6.4</b>
<b>PENCOED SUB AREA TOTAL</b>	<b>6.4</b>
<b>TOTAL</b>	<b>153.9 *</b>
<b>* = indicates that this amount is subject to change and confirmation following masterplanning exercises etc.</b>	

8.19 The new sites, if the recommendations from this study are confirmed in the deposit LDP following assessment as Candidate Sites, will make a positive contribution towards the employment land supply of the County Borough and, as many of these new sites are in areas of economic

need, will assist the Council and others in delivering the economic objectives of the Plan. The new sites are all on publicly owned land, which will assist in their deliverability, or are being actively promoted as employment areas by their owners or present occupiers. This ensures that policy-led as well as market required sites can be delivered which will meet the requirements of all potential business occupiers.

- 8.20 This report has assessed existing employment sites and those presented as potential employment areas through the LDP Candidate Site procedure. Notwithstanding this, however, there may be sites which come forward by other means which the Council consider are viable, deliverable and hence worthy of allocating for employment development. This is especially relevant to sites within the valley communities where the supply of employment land is restricted by topography and/or availability.

## 9. Conclusions and Recommendations: The New Employment Land Portfolio

- 9.1 In concluding this report it has been seen that there is potential to allocate up to 154 hectares of vacant employment land in Bridgend County Borough at the present time. Whilst on current average development rates this would give a 24 year supply it is important to reiterate the advice in Planning Policy Wales which states that:

***“sufficient land suitable for development for enterprise and employment uses and well served by infrastructure is designated for employment so as to meet both identified and as yet unidentified needs; and that new development for enterprise and employment uses is located and implemented in accordance with sustainability principles”.*** (Council’s Emphasis)

- 9.2 From this assessment it is clear that sufficient land is allocated for employment uses in the County Borough. In examining what might seem to be a large supply figure, it should be noted that over 57 hectares are included on just 2 sites: Brocastle and Island Farm. Therefore a significant contribution could (or could not) come from these two areas, parts of which may come forward after the end of the LDP. Notwithstanding this, the remaining 106 hectares could still deliver sufficient land for the LDP Plan period. It is vitally important the Council keeps a range and choice of employment sites which are attractive and flexible enough to potential investors and to this end, Brocastle and Island Farm can provide the type of high quality environments that are generally not available on many of the remaining sites.
- 9.3 In examining the distribution of the new portfolio it is clear that the majority of land is located in the Bridgend sub area (notwithstanding the two sites mentioned above also being located here). However, it is clear that this is the area where most of the market-led demand will come from. The proposed supply table also provides for a range of sites in areas which may not be attractive to the market, but where the public authorities may wish to bring forward employment development to serve wider economic aims and objectives, particularly in areas where there is high unemployment or that have been affected by recent company closures.
- 9.4 This situation will need to be kept under review and the Council’s current annual survey and liaison between the Development Planning and Economic Development sections, together with the new employment land database to monitor land use will ensure that long term planning and strategy decisions are taken in an informed environment.

**Bridgend County Borough Recommended Employment Land Portfolio****Bridgend**

Brackla Industrial Estate  
Bridgend Industrial Estate  
Bridgend Science Park  
Brocastle, Waterton  
Coity Sidings  
Coychurch Yard  
Crosby Yard  
Island Farm  
Litchard Industrial Estate  
Mackworth Road  
Parc Afon Ewenni  
Penybont Industrial Estate  
Ravens Court, Tondu Road  
Tremains House  
Trews Field  
Waterton Industrial Estate

**Porthcawl**

Glan Road  
Pwll y Waun

**Llynfi Valley / Maesteg**

Coegnant, Careau  
Ewenny Road, Maesteg  
Forge Industrial Estate  
Georgia Pacific  
Heol Ty Gwyn Industrial Estate  
Spelter Industrial Estate

**Ogmore Valley**

Coronation Works, Evanstown  
Isfryn Industrial Estate, Blackmill  
Penllwyngwent Industrial Estate,  
Ogmore Vale

**Garw Valley**

Ffaldau Industrial Estate,  
Pontycymmer  
Green Meadow, Llangeinor

**Valleys Gateway**

Abergarw Industrial Estate  
Brynmenyn Industrial Estate  
(including former Christie Tyler site)  
Enterprise Centre, Tondu  
Land at Tondu  
Sarn Park Services

**Pencoed**

Bocam Park, Pencoed  
Land South West of Sony  
Technology Park.  
Pencoed Technology Park  
Wern Tarw

**Pyle / Kenfig Hill / Cornelly**

Dunraven House, Stormy Down  
(formerly Bairdwear Factory, Pyle)  
South Cornelly Industrial Estate  
Ty Draw Farm, Pyle  
Village Farm Industrial Estate, Pyle

## **APPENDICES**





## **APPENDIX ONE – INITIAL EMPLOYMENT SITES ASSESSMENT**





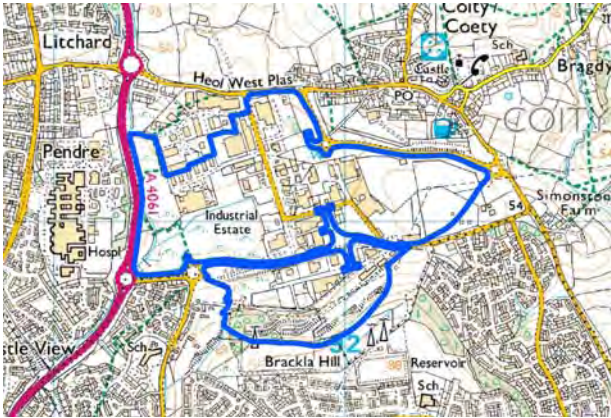
Name: **Abergarw Industrial Estate**  
 UDP Policy Number: **E3(1)**  
 Total Area: **9.23 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **2.99 ha**  
 B1 Floorspace: **1,670 sq m**  
 B2 Floorspace: **2,320 sq m**  
 B8 Floorspace: **2,730 sq m**  
 Sui Generis: **670 sq m**  
 Other Floorspace: **700 sq m**  
 Vacant Floorspace: **750 sq m**

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1	Market Attractiveness Factors	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
2	Sustainable Development Factors	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
3	Strategic Planning Factors	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Y
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	Y

Site Information	Site Commentary
<p>Located east of the A4064 at Abergarw and accessed from Junction 36 of the M4 (only 1 mile to the south). The site is predominantly flat, rising slightly to the east and south. Eastern part of the site is developed, remaining area is brownfield which was previously residential. Access is from Abergarw Road, serving Ogmores School and existing part of industrial estate. Potential for direct access to estate from Abergarw Road, subject to agreement with Highway Authority.</p> <p>As part of the WSRA process a number of strategic project themes have been created including 'Employment Sites' where each local authority was given the opportunity to identify sites where projects were proposed/deliverable that could be funded by the Western Valleys programme. Abergarw Industrial Estate was identified as serving the Garw and Ogmores Valley.</p>	<p>Abergarw Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings. Whilst there is potential conflict with the adjoining secondary school in terms of access there is a highway solution in place to resolve this with s106 agreements from new developments to fund this scheme.</p> <p>There is active interest in developing this site exemplified by an application 2009. BCBC own the vacant land and are actively marketing.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed, readily available and in public ownership. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**



Name: **Brackla Industrial Estate**  
 Policy Number: **E2(1)**  
 Total Area: **59.10 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **24.47 ha**  
 B1 Floorspace: **1,930 sq m**  
 B2 Floorspace: **34,239 sq m**  
 B8 Floorspace: **15,879 sq m**  
 Sui Generis: **1,670 sq m**  
 Other Floorspace: **2,300 sq m**  
 Vacant Floorspace: **21,149sq m**

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1	Market Attractiveness Factors	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
2	Sustainable Development Factors	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
3	Strategic Planning Factors	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Y
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	Y

Site Information	Site Commentary
<p>Large established industrial estate, accommodating a number of moderate to large sized industrial units. Many buildings are of low specification and there is little landscaping.</p> <p>Two access points from the A473 to the south and from the A4061 to the west linking to junction 36 of the M4</p> <p>Significant improvement and redevelopment is likely to occur within the production of a Masterplan for the publicly owned areas of the site which include the majority of vacant land.</p> <p>Allocated in the UDP as a 'Key' Employment Site.</p>	<p>Brackla Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings. The Welsh Assembly Government is in the process of producing a Development Brief for the site, which, if adopted, could potentially reduce the vacant employment land in the final site portfolio to approximately:</p> <p>However, the principle of the wider site delivering a substantial amount of employment land is not in question.</p>

**Conclusion: The majority of this site is an existing, active industrial estate with vacant land which is committed, readily available and in public ownership. However some of site is a potentially significant mixed use site which is being developed through a Masterplanning exercise. This part should therefore be considered for potential reassessment as part of this review.**



Name: **Bridgend Industrial Estate**  
 Policy Number: **E2(2)**  
 Total Area: **127.61 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **6.88 ha**  
 B1 Floorspace: **36,879 sq m**  
 B2 Floorspace: **93,547 sq m**  
 B8 Floorspace: **64,958 sq m**  
 Sui Generis: **15,469 sq m**  
 Other Floorspace: **11,110 sq m**  
 Vacant Floorspace: **46,878 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Y
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	Y

<b>Site Information</b>	<b>Site Commentary</b>
<p>One of Bridgend's largest and longest established industrial estates. The site has been extensively and successfully developed for a variety of businesses, ranging from small local firms to large multi-nationals.</p> <p>Off the A473, just 3 miles from junction 35 of the M4, Secondary access also from Cowbridge Road.</p> <p>Allocated in the UDP as a 'Key' Employment Site.</p>	<p>Bridgend Industrial Estate represents a great asset to the County Borough in terms of its employment generation, good infrastructure and prime location.</p> <p>The remaining vacant area of land is dwindling, however the attractiveness of the estate is exemplified by significant redevelopments of former large units (eg. Sony) into more viable smaller units which have proved to be very successful.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and readily available. There is also potential for significant redevelopment opportunities in the future. Therefore it should be excluded from potential release for other uses and included in final portfolio.**





Name: **Bridgend Science Park \***

Policy Number: **E6(1) \***

Total Area: **11.84 ha**

Vacant Area as at 1<sup>st</sup> October 2009: **1 ha**

B1 Floorspace: **7,180 sq m**

B2 Floorspace: **2,630 sq m**

B8 Floorspace: **0 sq m**

Sui Generis: **0 sq m**

Other Floorspace: **0 sq m**

Vacant Floorspace: **0 sq m**

\* shares boundary and allocation with Island Farm site which is considered separately below

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	Y
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>This site has been almost fully developed as a prestige science park and is occupied by a number of high technology businesses. The site benefits from extensive landscaping and buildings are of a high architectural design.</p> <p>The site is allocated as a Special Employment Site in the UDP</p>	<p>The relatively small area remaining undeveloped in the Bridgend Science Park is in the ownership of Logica CMG and it is intended that this land is reserved for the future expansion of this firm.</p> <p>An application for such an extension was lodged in 2005 but subsequently withdrawn.</p>

**Conclusion: This site is an existing, active employment site with a relatively small area of vacant land which is identified for the expansion of a specific firm. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**



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Name: **Brocastle Waterton**  
 Policy Number: **E2(3)**  
 Total Area: **52.13 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **46.63 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **18,299 sq m**  
 Vacant Floorspace: **0 sq m**

1	Market Attractiveness Factors	
1.1	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.2	Is the site being actively marketed as an employment site?	Y
1.3	Has there been any recent market activity? (This could include enquiries, sales or lettings)	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is development for employment viable, with any public funding if it is committed?	Y
1.6	Is the site immediately available?	N
2	Sustainable Development Factors	
2.1	Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?	N
3	Strategic Planning Factors	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is the site important in delivering other economic development objectives or the spatial strategy?	Y

Site Information	Site Commentary
<p>Brocastle is one of the most important and prestigious greenfield inward investment sites within the South Wales M4 corridor. The site is in a highly accessible and desirable countryside location on the outskirts of Bridgend, on the A48 towards Cowbridge.</p> <p>Access is gained off the A48, approximately 2.5 miles from Junction 35 of the M4 motorway. A new road access (roundabout) with realignment of A48 is now in place. Re-profiling is required to create development plateaux.</p> <p>The site is allocated as a Key employment site in the UDP.</p>	<p>The site is almost entirely undeveloped. It is considered to be the County Borough's greatest asset in terms of attracting large scale employment investment to the area. It is allocated as a Strategic Employment Site in the LDP Strategy.</p> <p>The site is owned by the Welsh Assembly Government who are current developing a Masterplan to cover the site for employment purposes in order to secure European funding to facilitate further road and utility infrastructure to make the site 'occupier-ready'. The Masterplan will also detail the development plateaux in more detail and examine the feasibility of bringing forward smaller-scale development, more suited to the changing employment structure up to 2021.</p>

**Conclusion: This site is an existing, publicly owned, strategic employment site. With work progressing to bring the site forward for significant employment developments. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**





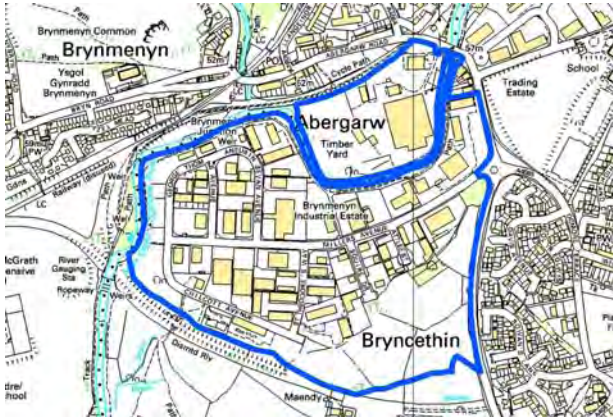
Name: **Bryncethin Depot**  
 Policy Number: **E3(2)**  
 Total Area: **1.38 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0 ha**  
 B1 Floorspace: **1,680 sq m**  
 B2 Floorspace: **0 sq ft**  
 B8 Floorspace: **1,080 sq m**  
 Sui Generis: **0 sq ft**  
 Other Floorspace: **0 sq ft**  
 Vacant Floorspace: **0 sq ft**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	N
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>This site is owned by BCBC and is currently being used as a depot / office area for Valleys to Coast Housing Association.</p> <p>The buildings are in a poor state and would possibly require demolition.</p> <p>It is likely that the site will be come redundant within the LDP Plan period.</p>	<p>The site is likely to be redundant during the LDP period and, due to its good relationship with the urban area of Bryncethin, would be ideally suited for a number of uses including residential, recreation and retailing particularly in conjunction with other vacant land to the north.</p> <p>Given this, it is considered opportune to reconsider the use allocated for this site. Albeit this will not decrease the amount of vacant employment land within the County Borough.</p>

**Conclusion: This site is an employment site which is likely to become redundant during the LDP period and is suitable for other uses. Therefore it should be **considered for potential reassessment** for other uses.**



Name: **Brynmenyn Industrial Estate**  
 Policy Number: **E3(3)**  
 Total Area: **34.72 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **9.41 ha**  
 B1 Floorspace: **9,480 sq m**  
 B2 Floorspace: **18,099 sq m**  
 B8 Floorspace: **6,490 sq m**  
 Sui Generis: **5,250 sq m**  
 Other Floorspace: **740 sq m**  
 Vacant Floorspace: **8,140 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Brynmenyn Industrial Estate is a modern, well maintained industrial estate, located south of the Ogmore and Garw valleys and only 1 mile north of the M4 motorway.</p> <p>The estate is generally occupied by medium sized businesses in well designed buildings within landscaped settings.</p> <p>The northern development area of the allocation is occupied by the Former Christie Tyler site which is become redundant and is currently subject of a mixed use planning application.</p>	<p>Brynmenyn is a successful industrial estate which has seen good levels of development in recent years.</p> <p>The closure of the former Christie Tyler premises on a discreet, separately accessed, part of the wider allocation presents an opportunity to reconsider the site for alternative uses. The present application before the Local Planning Authority seeks to replace the current buildings on this with residential development and facilitate the development of a similar amount of employment development which previously occupied the site, albeit in a more consolidated way.</p>

**Conclusion: Part of this site (former Christie Tyler) is an employment site which has become redundant and is suitable for other uses. Therefore this part should be **considered for potential reassessment for other uses.****



Name: **Coegnant, Maesteg**  
 Policy Number: **E3(4)**  
 Total Area: **8.15 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **8.15 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Located on the eastern side of the Llynfi Valley approximately 1.5 miles north of Maesteg Town Centre. The site comprises of reclaimed land encompassing the former Coegnant colliery, spoil tip and railway sidings.</p> <p>This forms part of a reclamation site which comprises of 3 plateaux- North and Middle are allocated for industrial use in the UDP. The Southern plateau is allocated for recreational purposes.</p>	<p>This long-standing employment site has not been successful in attracting development since it was reclaimed in the 1980's. However, given its location in one of the most economically deprived areas of the County Borough, the Western Valleys SRA and an LDP SRGA, it is vital that an element of employment development is retained in any future proposals.</p> <p>A mix of uses on the site could facilitate new employment development within the wider area.</p>

**Conclusion: This site is a long standing employment site which has not been brought forward for development but is located in an area of employment need. Therefore it should be **considered for potential reassessment** for other mixed uses which could still facilitate employment development on part of the site.**





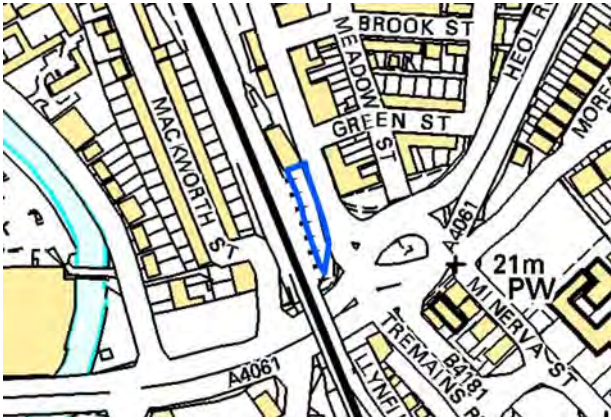
Name: **Coity Sidings, Bridgend**  
 Policy Number: **E4(3)**  
 Total Area: **2.57 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **2.01 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **1,030 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A centrally located Industrial area, close to Bridgend Town Centre fronting onto the A4061 which links the town centre to junction 36 of the M4 motorway. The site is predominantly unused and derelict, except for a proportion of its southern half.</p> <p>There may be significant levels of contamination from previously stored oil, coal and other hazardous materials, particularly towards the north western end of the sidings.</p>	<p>The area of employment land forms part of a larger site which is in the ownership of British Rail Residuary Board who have commenced work on a Development Brief to examine the potential for a range of uses on the site. The Local Planning Authority will be involved in the preparation of this brief. Due to its location within the urban area a number of different uses might be considered acceptable including residential, small-scale retail and leisure.</p>

**Conclusion:** This site is a long standing employment site which has not been brought forward for development; however it is located within a SRGA. It should therefore be **considered for potential reassessment** for other mixed uses which could still facilitate employment development on part of the site.



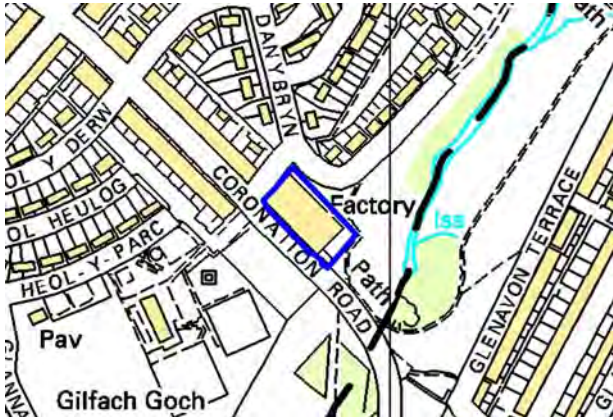
Name: **Coity Road, Bridgend**  
 Policy Number: **E10(3)**  
 Total Area: **0.07 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.07 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	N
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Y
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>This site is a relatively new employment allocation which was allocated by Policy E10 of the UDP. It is located within close proximity to the town centre as well as easily accessible to the M4.</p> <p>The site however, was not protected for employment in the UDP by Policy E7 and now has an extant planning permission for residential development.</p>	<p>This very small, constrained site was allocated in the UDP for office development but now has planning permission for residential development by a Registered Social Landlord (RSL).</p> <p>Given this it is unlikely that the site will now come forward for future employment development and it should be released from the employment land supply for alternative uses.</p>

**Conclusion: This site should be released for alternative uses from the employment land supply given its planning history.**



Name: **Coronation Works, Evanstown**  
 Policy Number: **E3(5)**  
 Total Area: **0.21 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **1,380 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A long established but now unoccupied factory unit located within the small valley settlement of Evanstown near Gilfach Goch.</p> <p>Access is off Coronation Road. The A4164 links the settlement to the Ogmore valley via Blackmill, whilst the A4093 provides a link to Llantrisant via the Tonyrefail by-pass.</p> <p>Planning applications in 2005 for residential development were refused.</p>	<p>This site remains unoccupied in its current form for at least the past 10 years. It has not been identified as a site which the Council is looking to assist in bringing forward for employment purposes. It is, however, in one of most economically deprived areas of the County Borough.</p> <p>However it is considered that its release for other uses could facilitate employment generation on a wider area of land, subject to an alteration of the settlement boundary of Evanstown. It is therefore pertinent that the opportunity is take to reassess this site.</p>

**Conclusion: This site is a long standing employment site which has not been brought forward for development. It should therefore be **considered for potential reassessment** for other mixed uses which could facilitate employment development on part of the site.**





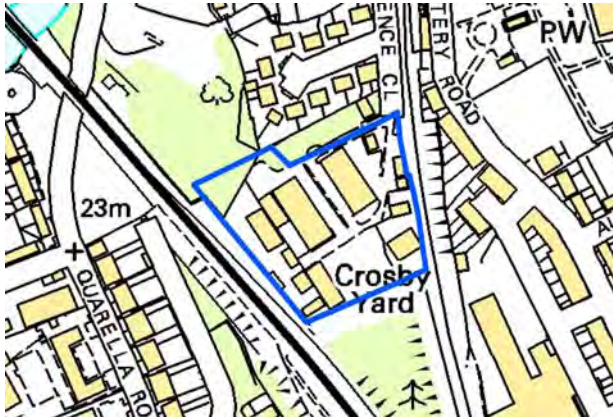
Name: **Coychurch Yard, Bridgend**  
 Policy Number: **E4(1)**  
 Total Area: **2.75 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.3 ha**  
 B1 Floorspace: **330 sq m**  
 B2 Floorspace: **2,310 sq m**  
 B8 Floorspace: **370 sq m**  
 Sui Generis: **1,030 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Y
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Mostly developed industrial site, suitable close to Bridgend Town Centre and residential areas which was formerly a builders yard for G Walker Slater. Recent significant developments include the erection of small units to replace the Tarran Workshops which stood where the nearby Asda development is located.</p> <p>Only two small development areas remain within the industrial for employment developments.</p>	<p>Coychurch Yard is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>There have been numerous planning applications recently which demonstrate an interest in this area for employment developments.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and readily available. Therefore it should be excluded from potential release for other uses and included in final portfolio.**



Name: **Crosby Yard, Bridgend**  
 Policy Number: **E4(2)**  
 Total Area: **1.3 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.09 ha**  
 B1 Floorspace: **2,490 sq m**  
 B2 Floorspace: **910 sq m**  
 B8 Floorspace: **720 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **480 sq m**

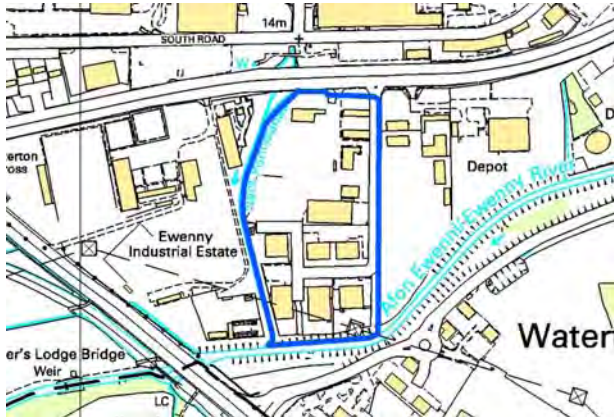
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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Crosby Yard is a small, yet centrally located Industrial Estate within the urban area of Bridgend. Containing small industrial units it is ideal for start-up and small businesses.</p> <p>Access to the estate is gained from Lawrence Close, a residential area within Wildmill.</p>	<p>Crosby Yard is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>With one very small plot of remaining to completely develop the site for employment purposes it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and readily available. Therefore it should be excluded from potential release for other uses and included in final portfolio.**





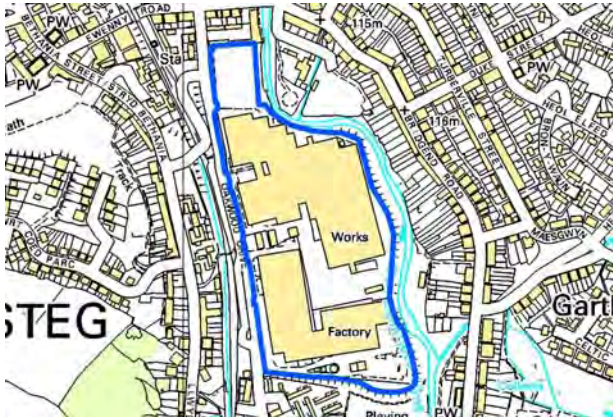
Name: **Ewenny Industrial Estate**  
 Policy Number: **E3(6)**  
 Total Area: **5.61 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0 ha**  
 B1 Floorspace: **1,510 sq m**  
 B2 Floorspace: **830 sq m**  
 B8 Floorspace: **480 sq m**  
 Sui Generis: **1,340 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **2,550 sq m**

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1	Market Attractiveness Factors	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
2	Sustainable Development Factors	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
3	Strategic Planning Factors	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

Site Information	Site Commentary
<p>Although fully developed, this site forms part of the area known as 'Parc Afon Ewenni'. This 34 hectare site represents a significant opportunity to improve this gateway area to Bridgend town from the M4 by way of an employment-led mixed use scheme with potential, subject to assessment, to accommodate other uses.</p> <p>In addition, the potentially phased introduction of a new signalised junction along the A473 to serve the site could potentially access Bridgend Industrial Estate and link to new pedestrian and cycle routes from the new Brackla train station and Brackla residential to the north.</p> <p>A Masterplan for the area is currently being formulated.</p>	<p>Whilst the redevelopment of this site will not impact on employment land availability in the short term, there is potential for this major site, if redeveloped, to significantly affect the employment property market across the County Borough. This impact will not only be the release of this land, but potentially on other employment land which may be needed to accommodate uses which are displaced by new development.</p> <p>It is therefore sensible to include this site for reassessment as part of the LDP employment land review.</p>

**Conclusion: This site is a potentially significant mixed use employment site which could be brought forward during the LDP. It should therefore be considered for potential reassessment as part of this review to ensure its impacts are taken into account.**



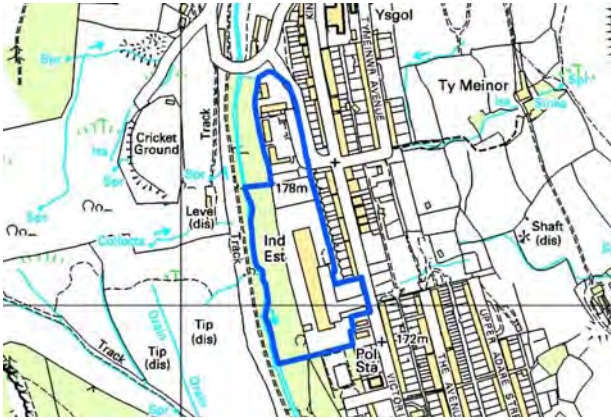
Name: **Ewenny Road, Maesteg**  
 Policy Number: **E3(7)**  
 Total Area: **7.69 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **40,049 sq m**

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<b>1</b>	<b>Market Attractiveness Factors</b>	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2</b>	<b>Sustainable Development Factors</b>	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3</b>	<b>Strategic Planning Factors</b>	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Y
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<p><b>Site Information</b></p> <p>A long established industrial area, formerly occupied by a number of large and well known industries, including Budelpak Cosi. The whole site is now vacant. The former Budelpak Cosi building is in the process of being demolished to clear the site. The site is located within an urban setting, close to Maesteg Town Centre and 7 miles north of Junction 36 of the M4 Motorway. It is also served by an adjacent railway station.</p> <p>As part of the WSRA process a number of strategic project themes have been created including 'Employment Sites' where each local authority was given the opportunity to identify sites where projects were proposed/deliverable that could be funded by the Western Valleys programme. This site was identified as serving the Llynfi Valley.</p>	<p><b>Site Commentary</b></p> <p>The northern area of this site is owned privately with the southern sector recently acquired by BCBC. It is envisaged that, due to the scale and location of the site, a mixed use scheme will come forward for the site in the near future by way of a comprehensive Masterplan. This will involve, subject to negotiation and agreement, the retention of some of the area for employment purposes.</p> <p>It is therefore sensible to include this site for reassessment as part of the LDP employment land review.</p>
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**Conclusion: This site is a potentially significant mixed use site which could be brought forward during the LDP. It should therefore be **considered for potential reassessment** as part of this review to ensure its impacts are taken into account.**



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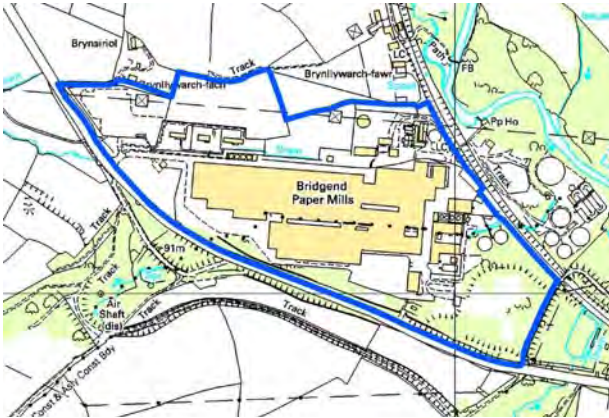
Name: **Ffaldau Industrial Estate**  
 Policy Number: **E4(6)**  
 Total Area: **3.27 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.07 ha**  
 B1 Floorspace: **290 sq m**  
 B2 Floorspace: **3,640 sq m**  
 B8 Floorspace: **260 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **160 sq m**

<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A practically fully developed industrial site in the Garw Valley between Pontycymer and Blaengarw, 6 miles north of junction 36 of the M4 motorway. One very small development site is available within the estate.</p> <p>Access is gained from the main A4064, linking the Garw Valley to Bridgend.</p>	<p>Ffaldau Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>With one very small plot of remaining to completely develop the site for employment purposes it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and readily available. Therefore it should be excluded from potential release for other uses and included in final portfolio.**





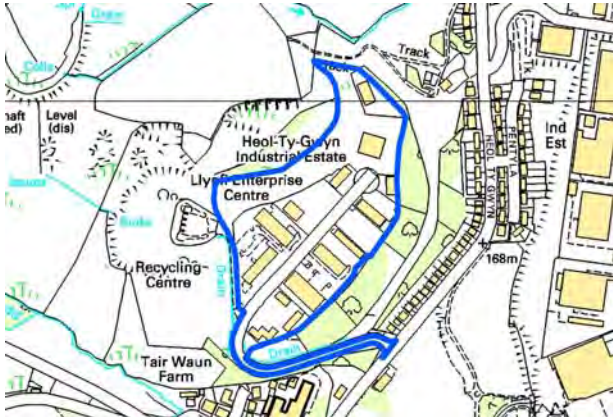
Name: **Georgia Pacific**  
 Policy Number: **E3(9)**  
 Total Area: **20.98 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **2.1 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **47,748 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	N
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	Y
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A single user, industrial site occupied by Georgia Pacific, a paper tissue manufacturing company. The vacant land is reserved to accommodate distribution and further production in the future.</p> <p>Access is gained off the A4063. Approximately 3 miles north-west of junction 36 of the M4 motorway</p>	<p>The remaining area of land within this allocation is reserved for the future expansion of the existing plant. Previous applications by the company suggest that there may be interest in developing the rest of this site in the future.</p> <p>Given this, it is sensible to retain this land within the employment land supply.</p>

**Conclusion: This site is an existing, active employment area with vacant land which is readily available for the expansion of the premises. Therefore it should be excluded from potential release for other uses and included in final portfolio.**



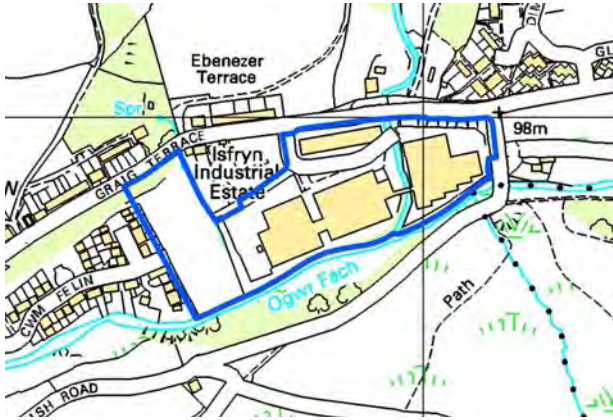
Name: **Heol Ty Gwyn, Maesteg**  
 Policy Number: **E3(11)**  
 Total Area: **5.6 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.23 ha**  
 B1 Floorspace: **1,610 sq m**  
 B2 Floorspace: **4,280 sq m**  
 B8 Floorspace: **880 sq m**  
 Sui Generis: **380 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **1,010 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>This small industrial estate is situated in an elevated location to the west of Maesteg Town Centre, approximately 10 miles from junction 36 of the M4 motorway. The estate is largely developed for small-scale local businesses; however a few small sites remain undeveloped.</p> <p>Access is gained off Heol Ty Gwyn</p>	<p>Heol Ty Gwyn Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>With one very small plot of remaining to completely develop the site for employment purposes it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and readily available. Therefore it should be excluded from potential release for other uses and included in final portfolio.**



Name: **Isfryn Industrial Estate**  
 Policy Number: **E3(12)**  
 Total Area: **3.89 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.9 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **11,630 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	Y

<b>Site Information</b>	<b>Site Commentary</b>
<p>A small well presented industrial estate, located in the village of Blackmill within the Ogmog Valley. The estate is currently dominated by 1 well established medium sized manufacturing company.</p> <p>The remaining vacant employment land is in the ownership of a house builder who has tried for a number of years to gain residential planning permission on the site.</p>	<p>The latest application before the Local Planning Authority for the vacant land is for a mixed use development comprising 43 residential units work units and enterprise centre.</p> <p>Should this application be approved its status would need to be reflected in the employment land supply. This situation should therefore be kept under review and reflected accordingly.</p>

**Conclusion: This remaining vacant area is a potential mixed use site which could be brought forward during the LDP. It should therefore be **considered for potential reassessment** as part of this review to ensure its impacts are taken into account.**





Name: **Island Farm, Bridgend**  
 Policy Number: **E6(1)**  
 Total Area: **25.95 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **25.95 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.2	Is the site being actively marketed as an employment site?	N
1.3	Has there been any recent market activity? (This could include enquiries, sales or lettings)	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is development for employment viable, with any public funding if it is committed?	Y
1.6	Is the site immediately available?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is the site important in delivering other economic development objectives or the spatial strategy?	Y

<b>Site Information</b>	<b>Site Commentary</b>
<p>A prestigious greenfield site in an accessible location along the A48, adjacent to the Bridgend Science Park. 5 miles from junction 35 and 37 of the M4 motorway. Part of the site comprises of former P.O.W Camp. New access to the site will be required off the A48.</p> <p>Site will be restricted to high technology or prestige firms of employment which requires high design standards. Hut 9 of the former P.O.W camp is to be retained &amp; is now a listed building. Any development would have to take into account the building &amp; if necessary incorporate it into design and layout. Requirement for high quality landscaping and architectural design.</p>	<p>The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP.</p> <p>It is currently subject of a planning application for a mix of uses, centred on a new rugby league stadium and training facilities as well as other leisure, commercial and office uses.</p> <p>Given the Strategic nature of this site, it is considered pertinent to keep the site in the employment land supply wholly for B1, B2 and B8 uses and only reflect a change should the planning status of the site alter.</p>

**Conclusion: This is a strategic employment site. It should be excluded from potential release for other uses and included in final portfolio.**



Name: **Land at Heol y Splott**  
 Policy Number: **E3(13)**  
 Total Area: **4.66 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **4.48 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

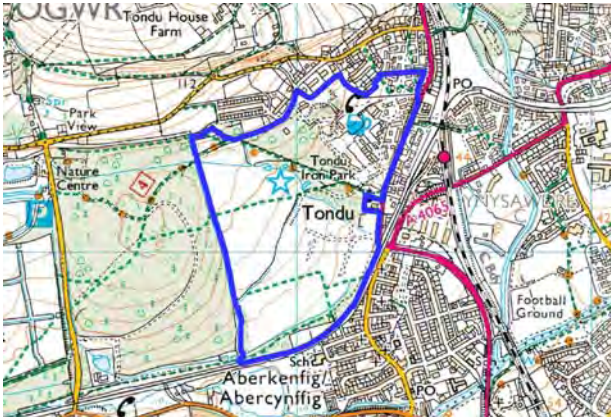
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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	N
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	Y
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A relatively new brownfield site employment allocation which is situated between the existing South Cornelly industrial estate and the adjacent quarry.</p> <p>Access is gained off Heol-y-Splott, with direct access to the South Cornelly by-pass and M4 motorway.</p>	<p>This land was first designated in the Bridgend Unitary Development for employment development. However, despite the fact that this site is allocated, and the adjacent South Cornelly Industrial Estate has no vacant land remaining, no interest in developing the site for employment purposes has been shown.</p> <p>It was, however, identified in the LDP Strategy to accommodate a waste management site. In releasing this site from employment uses, it is therefore considered appropriate to allocate it for waste-related development.</p>

**Conclusion: This site should be released for alternative uses from the employment land supply and assess for future waste management facilities.**





Name: **Land at Tondy**  
 Policy Number: **E3(14)**  
 Total Area: **17.00 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **6.39 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1</b>	<b>Market Attractiveness Factors</b>	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2</b>	<b>Sustainable Development Factors</b>	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3</b>	<b>Strategic Planning Factors</b>	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<p><b>Site Information</b></p> <p>The site is located west of the A4063 in Tondy. The core of site was previously occupied by NCB offices. Reclamation work has established two development plateaux, the southern of which has already been developed for residential and retail uses together with a waste transfer station.</p> <p>The site is strategically located in close proximity to the mouths of the three Bridgend valleys and in close proximity to the main urban settlement of Bridgend and the M4 motorway.</p>	<p><b>Site Commentary</b></p> <p>The northern plateau, where the vacant employment land remains, has had little developer interest to date. Given the sites position within the Valleys Gateway SRGA, it is pertinent to review the uses allocated for the site with a view to bringing a mixed use development forward which could include an element of employment development.</p> <p>It is therefore sensible to include this site for reassessment as part of the LDP employment land review.</p>
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**Conclusion: The remaining vacant area is a potential mixed use (including employment) site which could be brought forward during the LDP. It should therefore be considered for potential reassessment as part of this review process.**



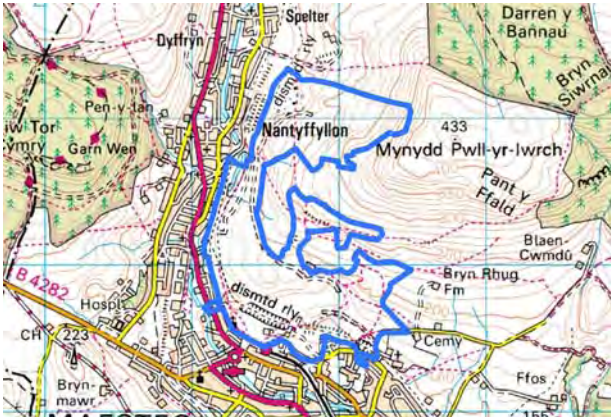
Name: **Llynfi Power Station**  
 Policy Number: **E3(16)**  
 Total Area: **18.5 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **18.5 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1</b>	<b>Market Attractiveness Factors</b>	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2</b>	<b>Sustainable Development Factors</b>	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	N
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3</b>	<b>Strategic Planning Factors</b>	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	Y
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>This is the site of an old power station which has now been partly demolished. It is located within a wooded valley of the Llynfi River- the site is well screened and not visible from the A4063.</p> <p>Access is via a secondary road and bridge over the railway off the A4063, the present access is inadequate and would require upgrading. Approximately 3 miles north-west of junction 36 of the M4 motorway.</p> <p>Considerable comprehensive reclamation of infrastructure works will be required. High initial costs relating to improved access over the railway-line. Area is also susceptible to flooding.</p>	<p>The site has been allocated for employment purposes for a considerable amount of time. The only development interest for the site has been to develop part of the allocated area for a Biomass power regeneration plant, which now has consent and includes road access improvements.</p> <p>Whilst acknowledging this position, the site still remains unattractive for mainstream employment purposes however. Therefore it seems pertinent to release the site for these uses, and to examine the potential to allocate the site for energy-generation related development in the LDP.</p>

**Conclusion: This site should be released for alternative uses from the employment land supply and assess for future energy-generation related development.**



Name: **Maesteg Washery Site**  
 Policy Number: **E4(8)**  
 Total Area: **1 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **1 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1</b>	<b>Market Attractiveness Factors</b>	
1.1	Has the site been formally identified for employment for at least 10 years?	N
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
<b>2</b>	<b>Sustainable Development Factors</b>	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3</b>	<b>Strategic Planning Factors</b>	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Maesteg Washery is a reclaimed mixed use regeneration site of which 1 hectare has been allocated for employment purposes in the UDP.</p> <p>Part of the site has recently been developed for a new secondary school to serve the area.</p> <p>The site is situated approximately 8 miles north-west of junction 36 of the M4 motorway.</p>	<p>A Development Brief for this site is still to be produced.</p> <p>The employment element of the scheme has always been a complementary element and minor element of any proposals. Given the amount of other employment land on designated sites known to be made available in the area (including the former Budelpak Cosi site), it appears sensible to release this land from its employment allocation.</p>

**Conclusion: This site should be released for alternative uses from the employment land supply.**





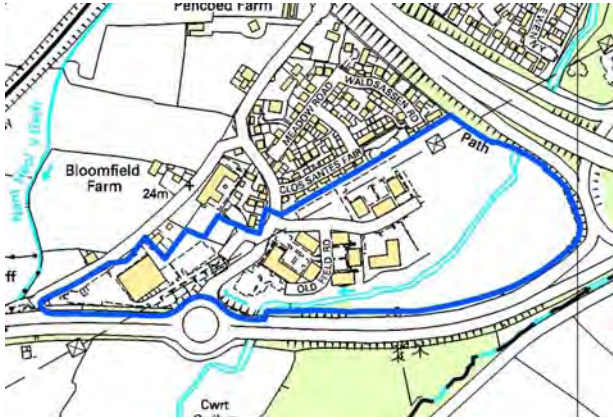
Name: **Mid Glamorgan Depot, Waterton**  
 Policy Number: **E3(17)**  
 Total Area: **12.73 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0 ha**  
 B1 Floorspace: **10,390 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **2,740 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1</b>	<b>Market Attractiveness Factors</b>	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Y/N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2</b>	<b>Sustainable Development Factors</b>	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3</b>	<b>Strategic Planning Factors</b>	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Although fully developed, this site forms part of the area known as 'Parc Afon Ewenni'. This 34 hectare site represents a significant opportunity to improve this gateway area to Bridgend town from the M4 by way of an employment-led mixed use scheme with potential, subject to assessment, to accommodate other uses.</p> <p>In addition, the potentially phased introduction of a new signalised junction along the A473 to serve the site could potentially access Bridgend Industrial Estate and link to new pedestrian and cycle routes from the new Brackla train station and Brackla residential to the north.</p> <p>A Masterplan for the area is currently being formulated.</p>	<p>Whilst the redevelopment of this site will not impact on employment land availability in the short term, there is potential for this major site, if redeveloped, to significantly affect the employment property market across the County Borough. This impact will not only be the release of this land, but potentially on other employment land which may be needed to accommodate uses which are displaced by new development.</p> <p>It is therefore sensible to include this site for reassessment as part of the LDP employment land review.</p>

**Conclusion: This site is a potentially significant mixed use employment site which could be brought forward during the LDP. It should therefore be considered for potential reassessment as part of this review to ensure its impacts are taken into account.**



Name: **The Triangle Site, (Bocam Park), Pencoed**  
 Policy Number: **E6(3)**  
 Total Area: **10.19 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **1.16 ha**  
 B1 Floorspace: **5,070 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **1,930 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **1,840 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A triangular greenfield site in a prominent gateway location to the County Borough, on the outskirts of the settlement of Pencoed, adjacent to junction 35 of the M4 motorway.</p> <p>The site is bounded by the M4, A473 and the B4280 and has been reserved in the adopted Unitary Development Plan for B1 - Special employment purposes.</p> <p>Development of this prominent site is progressing well. There has been recent developer interest in constructing a hotel on part of the site, which is seen as a complementary use to its employment designation.</p>	<p>Bocam Park is establishing itself as a popular office park along the strategically important M4 corridor.</p> <p>With a relatively small amount of vacant land left to develop it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active business park with vacant land which is committed and readily available. Therefore it should be excluded from potential release for other uses and included in final portfolio.**



Name: **Pencoed Technology Park**  
 Policy Number: **E6(4)**  
 Total Area: **30.57 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **5.4 ha**  
 B1 Floorspace: **35,009 sq m**  
 B2 Floorspace: **2,440 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **16,339 sq m**

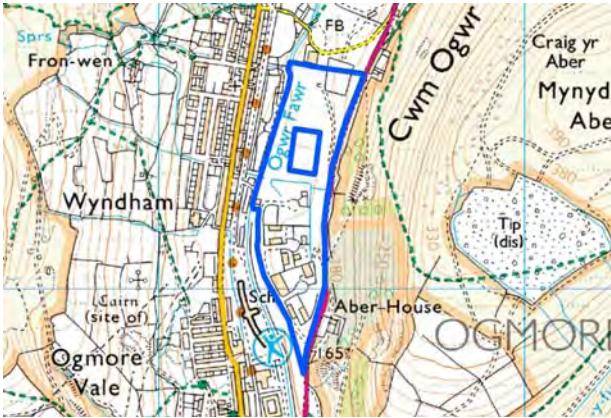
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<b>1 Market Attractiveness Factors</b>		
1.1	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.2	Is the site being actively marketed as an employment site?	Y
1.3	Has there been any recent market activity? (This could include enquiries, sales or lettings)	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is development for employment viable, with any public funding if it is committed?	Y
1.6	Is the site immediately available?	N
<b>2 Sustainable Development Factors</b>		
2.1	Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	Y
3.4	Is the site important in delivering other economic development objectives or the spatial strategy?	Y

<b>Site Information</b>	<b>Site Commentary</b>
<p>This is a greenfield site which was allocated for Special Employment Uses in the UDP.</p> <p>Whilst most of the site lies within the neighbouring Rhondda Cynon Taf authority, some 5 hectares remain in Bridgend under the ownership of BCBC and the Welsh Assembly Government.</p> <p>The infrastructure requirements for the wider site to the south (in RCT) are in place. The Council is working with WAG to attract development which will facilitate the provision of appropriate infrastructure in the Bridgend area.</p>	<p>The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP.</p> <p>The site has the benefit of outline planning permission for B1, B2 and B8 uses, although no development on the Bridgend side of the site has been consented in detail. There are also proposals to redevelop part of the former Sony site for employment uses.</p> <p>Given the Strategic nature of this site, it is considered pertinent to keep the site in the employment land supply wholly for B1, B2 and B8 uses.</p>

**Conclusion: This is a strategic employment site. It should be excluded from potential release for other uses and included in final portfolio.**





Name: **Penllwyngwent, Ogmore Vale**  
 Policy Number: **E3(18)**  
 Total Area: **11.85 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **5.39 ha**  
 B1 Floorspace: **650 sq m**  
 B2 Floorspace: **1,290 sq m**  
 B8 Floorspace: **10,510 sq m**  
 Sui Generis: **1,430 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **3,350 sq m**

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1	Market Attractiveness Factors	
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N
2	Sustainable Development Factors	
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
3	Strategic Planning Factors	
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

Site Information	Site Commentary
<p>Penllwyngwent Industrial Estate is a, BCBC owned reclaimed colliery site within the Ogmore Valley. It is a flat, easily developable site on the valley floor, Phase 1 is substantially developed and includes local authority starter units and WAG intermediate units. Permanent access and infrastructure provision will need to be provided to facilitate the development of the remaining vacant area of land.</p> <p>As part of the WSRA process a number of strategic project themes have been created including ' Employment Sites' where each local authority was given the opportunity to identify sites where projects were proposed/ deliverable that could be funded by the Western Valleys programme. This estate was identified as serving the Ogmore Valley.</p>	<p>The Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>Whilst infrastructure is required to make the remaining vacant land available, this site is one of the few employment sites in the Ogmore Valley with remaining vacant land, it is therefore sensible to keep it in the employment land supply schedule. Although the existing playing field in the centre represents a constraint.</p>

**Conclusion: This site is an existing, active industrial estate with vacant land which is committed and will be available when infrastructure is provided. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**



Name: **Ty Draw Farm, Pyle**  
 Policy Number: **E6(5)**  
 Total Area: **6.04 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **6.04 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

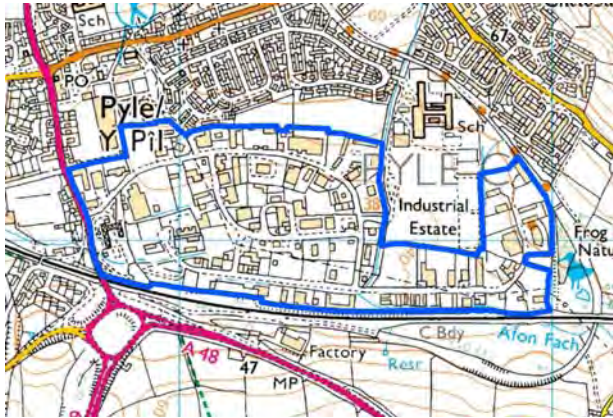
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<b>1 Market Attractiveness Factors</b>		
1.1	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.2	Is the site being actively marketed as an employment site?	N
1.3	Has there been any recent market activity? (This could include enquiries, sales or lettings)	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is development for employment viable, with any public funding if it is committed?	N
1.6	Is the site immediately available?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Does the site meet present (and expected future) sustainability criteria (including public transport and freight access, on and off-site environmental impacts)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is the site important in delivering other economic development objectives or the spatial strategy?	Y

<b>Site Information</b>	<b>Site Commentary</b>
<p>This greenfield site, owned by the Welsh Assembly Government, is located west of the A4429 within the north west quadrant of junction 37 of the M4 motorway. The site is bounded to the west by residential development and is well screened by a dense tree belt from the A4429. The land slopes considerably up towards the north of the site, where the crown is visible and highly exposed.</p> <p>In 2005, an application for residential development on this site was dismissed.</p>	<p>The site was designated as a Strategic Employment Site in the LDP Preferred Strategy and a Special Employment Site in the UDP.</p> <p>Given the Strategic nature and location of this site, it is considered pertinent to keep the site in the employment land supply wholly for B1, B2 and B8 uses and only reflect a change should the planning status of the site alter.</p>

**Conclusion: This is a strategic employment site. It should be excluded from potential release for other uses and included in final portfolio.**





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Name: **Village Farm Industrial Estate, Pyle**

Policy Number: **E3(20)**

Total Area: **45.8 ha**

Vacant Area as at 1<sup>st</sup> October 2009: **5 ha**

B1 Floorspace: **10,950 sq m**

B2 Floorspace: **37,819 sq m**

B8 Floorspace: **14,149 sq m**

Sui Generis: **2,490 sq m**

Other Floorspace: **7,980 sq m**

Vacant Floorspace: **6,790 sq m**

<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	N
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A large, established industrial estate, which is substantially developed, one of the few established employment areas in this part of the County Borough.</p> <p>Situated off the A48 on the outskirts of Pyle, less than 1 mile from junction 37 of the M4.</p> <p>The western part of the industrial estate is very much commercial / retail in the nature of its operation. Whilst not directly relevant to this review, a decision to allocate part of the estate as a retailing centre could affect the overall employment land figure.</p>	<p>Village Farm Industrial Estate is a well established employment / industrial site within the existing urban area and relates well to its surroundings.</p> <p>With a relatively small amount of land within the boundaries of the estate remaining to develop the site completely for employment purposes, it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active industrial estate with some vacant land remaining. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**



Name: **Waterton Industrial Estate**  
 Policy Number: **E2(4)**  
 Total Area: **124.6 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **11.29 ha**  
 B1 Floorspace: **31,019 sq m**  
 B2 Floorspace: **248,802 sq m**  
 B8 Floorspace: **54,388 sq m**  
 Sui Generis: **2,710 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **2,340 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	Y
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	Y
1.3	Is the site being actively marketed as an employment site?	Y
1.4	Is the site owned by a developer or another agency known to undertake employment development?	Y
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	Y
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	Y
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>A prestige site of regional importance with larger plots which could potentially meet the needs of inward investors.</p> <p>Situated alongside the A473 dual carriageway and the A48, significant occupiers include the Ford Motor-company.</p> <p>The quality of the environment together with its strategic position and good access have made this estate very attractive to developers.</p> <p>It is allocated as a key employment site in the UDP.</p>	<p>Waterton Industrial Estate is a popular, high quality established employment / industrial site which continues to attract investment and development.</p> <p>Given its status as an existing employment area with good access and location, relatively well related to the urban area it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is an existing, active employment area with some vacant land remaining. Therefore it should be **excluded from potential release** for other uses and included in final portfolio.**







Name: **Pwll y Waun**  
 Policy Number: **E4(4)**  
 Total Area: **0.7 ha**  
 Vacant Area as at 1<sup>st</sup> October 2009: **0.7 ha**  
 B1 Floorspace: **0 sq m**  
 B2 Floorspace: **0 sq m**  
 B8 Floorspace: **0 sq m**  
 Sui Generis: **0 sq m**  
 Other Floorspace: **0 sq m**  
 Vacant Floorspace: **0 sq m**

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<b>1 Market Attractiveness Factors</b>		
1.1	Has the site been formally identified for employment for at least 10 years?	N
1.2	Has there been any recent development activity, within the last 5 years? This could include works on site but also new or revised planning applications/building regulations applications.	N
1.3	Is the site being actively marketed as an employment site?	N
1.4	Is the site owned by a developer or another agency known to undertake employment development?	N
1.5	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	N
1.6	Is there a valid permission for employment development, likely to meet market requirements? Or for an alternative use?	N
1.7	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Y
<b>2 Sustainable Development Factors</b>		
2.1	Would the site be allocated today for employment development, measured against present sustainability criteria (including public transport and freight access, environmental impacts and brownfield/Greenfield considerations)?	Y
2.2	Is employment the only acceptable form of built development on this site (e.g. because of on-site contamination, adjoining uses or sustainable development reasons)?	N
<b>3 Strategic Planning Factors</b>		
3.1	Is the site within an area identified as a Strategic Regeneration Growth Area in the LDP Preferred Strategy?	Y
3.2	Is the site identified or likely to be required for a specific user or specialist use?	N
3.3	Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses?	N
3.4	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N
3.5	Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site?	N

<b>Site Information</b>	<b>Site Commentary</b>
<p>Pwll y Waun is a small mixed-use site within the urban area of Porthcawl.</p> <p>Its allocation for development was made as a direct result of a recommendation from the UDP Inquiry Inspector in 2005. The envisaged scheme was for a mix of uses including housing, employment and recreation facilitating greater public access to amenity land.</p> <p>Since its designation, no development interest has been shown in the site.</p>	<p>This site represents one of the few employment allocations which remain in the Porthcawl area and represents an opportunity to bring forward a high quality development in attractive surroundings.</p> <p>Given its small scale nature, relative youth and good location it is sensible to keep it in the employment land supply schedule.</p>

**Conclusion: This site is a relative new, attractive mixed use development opportunity in Porthcawl which could facilitate wider benefits; it should be **excluded from potential release** for other uses and included in final portfolio.**



## **APPENDIX TWO – PROPERTY PROFESSIONALS SURVEY**



## **Questions**

1. Please indicate what you consider to be the major issues currently facing the office and industrial markets in Bridgend County Borough at the present time. This could include consideration of the:
  - a. availability of suitable land and buildings;
  - b. demand from occupiers (both national and local);
  - c. location of business parks and industrial estates through the borough (are some more successful than others?);
  - d. national economic situation;
2. Acknowledging the trends that have taken place over the last few years, what are you predictions for the next 18 months (to 2011) in terms of the issues you highlighted in questions 1 and 2? Are you optimistic or pessimistic about the future state of the market by 2011.
3. Thinking further ahead to 2016 and to the end of the Local Development Plan (LDP) period at 2021, how different do you see the office and industrial markets being in Bridgend County Borough at these dates? What profile should the County Borough's employment land portfolio have by then?

## **Responses Received**

Gary Carver – Savills

Dyfed Miles – Watts & Morgan

Alder King – Keri Harding – Jones

Ben Bolton – Cooke & Arkwright

David Williams – Emanuel Jones

Tom Merryfield – Fletcher Morgan

Simon Villis – GVA Grimley

Chris Sutton – King Sturge

Michael Bruce – DLP Surveyors

Henry Best – Charnwood Group





## **APPENDIX THREE – BUSINESS SURVEY**



## Bridgend County Borough Business Property Survey

### YOUR COMPANY DETAILS

Company Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Position: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
Business Activity: \_\_\_\_\_

### EMPLOYEES

1. Number of **full-time** employees \_\_\_\_\_ and **2. part-time** employees \_\_\_\_\_

3. Does your business suffer from any staff shortages or skills issues? No  Yes

If so, what? \_\_\_\_\_

### CURRENT ACCOMMODATION

Type of accommodation:

4. Office	<input type="checkbox"/>	5. Freehold	<input type="checkbox"/>
Serviced office	<input type="checkbox"/>	Leasehold	<input type="checkbox"/>
Industrial	<input type="checkbox"/>		
Warehouse	<input type="checkbox"/>		
Hi-tech / Lab	<input type="checkbox"/>		
Site	<input type="checkbox"/>		

### 6. Size of Unit

0-1,000 sq ft	<input type="checkbox"/>	1,001 – 2,000 sq ft	<input type="checkbox"/>	2,001 – 5,000 sq ft	<input type="checkbox"/>
5,001 – 10,000 sq ft	<input type="checkbox"/>	10,001 – 20,000 sq ft	<input type="checkbox"/>	20,001 – 50,000 sq ft	<input type="checkbox"/>

Larger (please state): \_\_\_\_\_ sq ft  
Site size: \_\_\_\_\_ acres

7. How satisfied are you with your current accommodation?

Very Satisfied  Satisfied  Unsatisfied  Very Unsatisfied

8. If you are unsatisfied or very unsatisfied, please state your reasons:

\_\_\_\_\_  
\_\_\_\_\_

### FUTURE ACCOMMODATION

9. Are you considering moving premises with the next:

12 months:	Yes	<input type="checkbox"/>	2 – 3 years:	Yes	<input type="checkbox"/>
	No	<input type="checkbox"/>		No	<input type="checkbox"/>

If you answered yes to either of the above, please respond to questions 10a – 10h, otherwise go directly to question 11.

10. What type of accommodation will you be looking for? (please tick main type / use)

10a. Office  Industrial  Serviced Office   
Warehouse  Hi-tech / Lab  Land

10b. Tenure Required? Freehold  Leasehold

10c. Quality of premises preferred?  
Prestigious  Moderate  Basic/ Budget

10d. Will this be **additional**  or **alternative**  to the existing property?

10e. What size of unit / site will you be looking for?

0-1,000 sq ft  1,001 – 2,000 sq ft  2,001 – 5,000 sq ft   
5,001 – 10,000 sq ft  10,001 – 20,000 sq ft  20,001 – 50,000 sq ft   
Larger (please state): \_\_\_\_\_ sq ft  
Site size: \_\_\_\_\_ acres

10f. General location – please indicate preferred area(s) below:

Bridgend  Porthcawl  Maesteg (Llynfi Valley)   
Garw Valley  Ogmore Valley  Pyle / Kenfig Hill / Cornelly   
Valleys Gateway (Sarn / Aberkenfig / Bryncethin / Brynmenyn / Tondu)   
Pencoed  Elsewhere (please state)  \_\_\_\_\_

10g. Location type preferred: Town Centre  Business Park   
Industrial Estate  No preference

10h. What do you consider to be the most important factor when seeking alternative accommodation?  
Please state below:

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### ADDITIONAL COMMENTS

11. If you have any additional comments, please use the space below.

Suggested topics might include:

- ◆ Road infrastructure
- ◆ Public transport
- ◆ Staff availability
- ◆ Business support
- ◆ Lack of property options
- ◆ Planning issues

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**Thank you for your assistance. All comments will be treated in confidence.**