

North Wales Planning Authorities
**North Wales Regional
Employment Land Strategy**
Strategy Document

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This report takes into account the particular instructions and requirements of our client.

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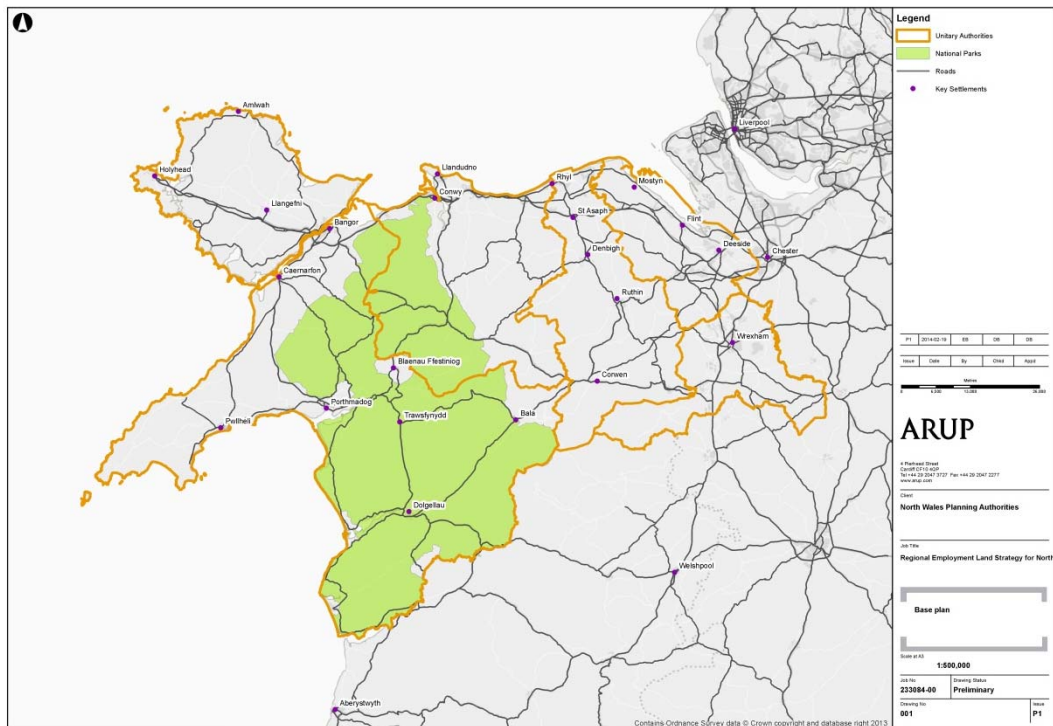
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1 Introduction

1.1 Background and Objectives

Snowdonia National Park Authority, on behalf of all seven Local Planning Authorities in North Wales¹ commissioned Arup in October 2013 to prepare a Regional Employment Land Strategy for North Wales. The extent of the study is shown in Figure 1 below.

Figure 1 Study Area



The need for the strategy emerged through research undertaken by the North Wales Economic Ambition Board and follows the publication of ‘North Wales Economic Ambition: A Strategy for Change’². This strategy recognises the unprecedented challenges being faced by public services in the wake of recession, subsequent cuts in government expenditure and sets a vision for the region which seeks to improve productivity, competitiveness and growth in the North Wales economy.

The commission builds upon the short term priorities identified in the strategy for change which recognises Inward Investment and Enterprise as two key economic drivers. In achieving the short term priorities, the strategy recognises the need for a new protocol for joint working in these areas of economic development; ensuring that all investment leads and decisions are dealt with in a coordinated and holistic manner.

¹ Snowdonia National Park, Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham.

² North Wales Economic Ambition: A Strategy for Change (2013): North Wales Economic Ambition Board

Central to this is a need to understand the role and function of strategic employment sites across the region and planning clear investment priorities to ensure adequate supply of strategic employment land over the strategy period.

This coordinated approach is encouraged by the recently published TAN 23 Economic Development³ and the publication of the Draft Planning (Wales) Bill⁴.

In this context, the study brief set five key objectives for this study which are as follows:

- Understand the role and function of strategic employment sites in North Wales;
- Assess how locally defined strategic sites and any proposed extensions or new allocations in adopted Local Development Plans (LDP's) are capable of meeting the needs of North Wales for the next 20 years;
- Identify any gaps in employment land provision (in terms of quality, quantity and location) and to give a broad indication of where site expansion should take place and where new sites should be allocated and/or developed;
- Provide an evidence base for regional collaboration between the seven LPA's in North Wales, in accordance with the provisions of TAN 23 and with those of adjoining areas (e.g. Mid Wales and the Mersey Dee area); and
- Ensure that any recommendations comply with the principles of sustainable development in the Welsh context and which can be suitably and practically delivered.

1.2 Approach and Structure

Our approach to the development of this strategy has broadly followed the key stages outlined below:

- **Stage 1 Baseline Review:** A review was undertaken of key background information including national policy and strategies, economic strategy documents, planning policy and employment land reviews (ELR's) at the local level, and key socio-economic datasets in order to understand key issues, opportunities and the policy framework for the strategy. A key element of this stage was also understanding economic development programmes already in place for the region (e.g. Energy Island).
- **Stage 2 Understand Future Requirements:** A review was undertaken of key economic data for the region including the business register and employment survey (BRES). Forecasts for the key sectors were produced by Experian Economics in order to inform the strategy for the region. This stage also developed a short list of sites based on previous ELR work and sectoral needs emerging as part of the study.
- **Stage 3 Developing the Strategy:** A qualitative assessment of the identified strategic sites was undertaken in order to understand constraints and requirements for delivery. These sites were then analysed against the sectoral forecasts developed prior to an action plan and site strategy being developed.

³ Technical Advice Note 23: Economic Development (February 2014), Welsh Government

⁴ Draft Planning (Wales) Bill and Positive Planning: proposals to reform the planning system in Wales (December 2013), Welsh Government

This report presents the North Wales Regional Employment Land Strategy and is summarised in a desk-top published document. The strategy is supported by an evidence based document which was submitted to the client group in December 2013. This document presents much of the information gathered as part of Stage 1 described above.

The remainder of this Strategy Document is set out as follows:

- **Section 2** provides some background to the strategy at the North Wales level and reviews some key locational criteria;
- **Section 3** explores the future potential for North Wales and provides an overview of the key sectors in the context of North Wales before setting out sectoral growth forecasts;
- **Section 4** explores the supply of strategic employment land in North Wales and develops a portfolio of land which forms the basis of the strategy;
- **Section 5** presents the strategy focussing on North Wales wide priorities as well as recommendations at the site and sector levels; and
- **Section 6** provides conclusions and recommendations in order that the strategy is taken forward successfully.

2 Background

2.1 Introduction

North Wales is a diverse region in terms of both the economy and the geography of the area. These differences present distinctive sub-regions across North Wales, some of which benefit from excellent connectivity and investor interest and others which operate on a more local scale with limited interest from major investors.

The North Wales Regional Employment Land Strategy provides a non-statutory framework for the region in recognition of the nature of economic development and investment decisions. The strategy has evolved from a previous report by the seven North Wales planning authorities entitled ‘Economic Ambition: A Strategy for Change’ and responds to recent planning policy guidance in Wales which seeks to encourage and facilitate regional working, with local planning authorities collaborating in areas such as economic development, where administrative boundaries have little positive influence.

The Strategy covers the whole of North Wales and will support spatial development at both the regional (North Wales) and sub-regional (lower than North Wales) levels. The Strategy has drawn from work undertaken at the local level in the form of development plans, economic development strategies and employment land reviews. It has been based on a number of identified challenges and opportunities facing the region and recognises the opportunities presented by current initiatives and investment interest in the Enterprise Zones, Wylfa Newydd and the role of emerging/growth sectors.

The broad spatial planning principles underpinning the Strategy are to:

- Create a clear identity for the North Wales region;
- Ensure adequate quality strategic employment land is being provided in the right locations across North Wales to meet the region’s economic ambitions for the next 20 years;
- Protect and enhance strategic employment sites, ensuring sites have a clear role moving forward;
- Identify necessary infrastructure investment in order to ensure timely delivery of strategic sites;
- Enhance the external competitiveness of the region, building on existing programmes and investment commitments;
- Ensure that strategic employment sites are sustainable and in line with national and local planning policy; and
- Create an action plan for the promotion and development of strategic sites, enabling the region to capture legacy benefits from committed major investment.

Source: Arup

While the Strategy has been prepared in the context of national and local planning policy it should be utilised by the North Wales planning authorities in updating Local Development Plans (LDP’s) where certain actions would be supported through refinement and amendment to the local policy framework.

The Strategy has been developed in order to support key sector growth across North Wales, recognising the importance of North Wales policy drivers, setting a consistent message at the regional level and providing an overarching framework for investment.

Within the strategy reference is made to certain geographies where sector investment may be particularly strong (e.g. advanced manufacturing in the North East), however, the focus for the strategy is ensuring these strengths lead to wider benefits for the region as a whole.

2.2 Key Location Factors

2.2.1 Why North Wales?

North Wales offers a range of key location factors that have the potential to influence business decisions to invest or expand in the region. These can be summarised as follows:

Diverse Region – North Wales offers strategic employment sites for a diverse range of industries in a diverse range of urban and rural geographies.

Quality Lifestyle - North Wales is a region which offers a diverse range of urban and rural settlements with retail and leisure opportunities, surrounded by some of Wales' best kept coastal and inland natural environment.

Cost-effective – North Wales offers a cost competitive location for business with lower than average business rents, land values and wages.

Academic Excellence – North Wales contains two universities with strong industry linkages along with numerous higher education facilities which offer strong business links and a number of centres of excellence.

Workforce - With a population of approximately 688,000 and close proximity to Mid Wales and North West England, North Wales offers access to a quality workforce.

Enterprise Zones – North Wales offers investor's access to three Enterprise Zones with opportunities for various investment incentives.

Established Centres of Business - A proven business location, the region is home to some of Wales' key employers in a number of priority sectors such as the automotive, aerospace and life science sectors.

2.2.2 North Wales Economic & Labour Profile

The latest quarterly updates from Stats Wales show improvements in the employment rate and falling unemployment and economic inactivity (in the year to September 2013). Over the longer term, the labour market in North Wales has generally seen a greater improvement than the whole of Wales since 2001.

Headline messages from the key quarterly data include:

- 309,800 people in employment in the year to September 2013, up 1% over the year;

- GVA in North Wales in 2012 was £10.6 billion, up 3% over the year and up 64% since 1999;
- 53,400 enterprises active in North Wales in 2013, of which 94% were in the zero to micro size band (0-9 employees).
- Foreign Direct Investment (FDI) is a very small proportion of business in North Wales although this investment contributes a large number of jobs and is most likely to have demand for strategic employment sites;
- 0.7% of enterprises active in North Wales in 2013 were foreign-owned, just above the percentage for Wales (0.5%); and
- In comparison to other Welsh regions, North Wales had the highest employment rate, the second lowest ILO⁵ unemployment rate and the lowest inactivity rate.

2.2.3 Skills & Academic Excellence

North Wales has a large pool of skilled workers, benefitting from good strategic connections into England on the eastern border and connections to Mid Wales on the southern border.

The region is home to two excellent further education (FE) colleges (Coleg Cambria and Grwp Llandrillo Menai) offering a wide range of practical vocational courses, many of which are linked directly to local employers and can provide bespoke training.

Table 1: Workforce Qualifications

Highest Level of Qualification	North Wales	Wales
NVQ Level 4 or Higher	137,501	614,116
NVQ Level 3	68,783	308,171
NVQ Level 2	92,986	393,819

The region is also home to approximately 21,000 students studying at either Bangor University or Glyndwr University.

Bangor University

Bangor University is located within Gwynedd and supports 11,000 students and 650 teaching staff who contribute to the local economy. It is a research-led university with world-leading research status in all 19 subject areas it teaches. Bangor Business School has been labelled the ‘The UK’s No.1 Business School for Accounting, Banking and Finance’⁶.

The University benefits from close links with the NHS in Wales and a partnership helps research be implemented into practice. The university offers a range of courses in the marine and environmental sectors and operates the Sustainable Environment Research Centre bringing together leaders from biology,

⁵ International Labour Organisation – the headline measure of unemployment covering those who are out of work and want a job, have actively sought work in the last 4 weeks and are available to start work in the next 2 weeks, plus those out of work, have found a job and are waiting to start in the next 2 weeks.

⁶ UK University Research Assessment Exercise

engineering, chemistry and physics with a focus on meeting the energy security and environmental challenges of the new millennium.

The planned Pontio Arts & Innovation Centre is also due to open in 2014 as a world class centre for innovation in science, technology and the creative arts.

Glyndwr University

In the east of the region Glyndwr University, located within Wrexham provides initiatives to support the business community and contribute to local economic development. These include:

- The Advanced Composite Training and Development centre, a partnership between the University, Airbus, Coleg Cambria and the Welsh Government to bring new materials technology business to the region;
- The OpTIC Glyndwr initiative at St Asaph Business Park;
- Centre for solar energy research, St Asaph;
- Centre for Creative Industries, which is the new home of BBC Cymru Wales in Wrexham; and
- The Industrial Biopolymer Knowledge Transfer Centre.

2.2.4 Investment Enquiries

Inward investment enquiries can form a key measure in the performance of a region when looking at the attractiveness of the area and site portfolio for strategic investment. If records allow, monitoring such enquiries can also provide useful information in relation to the reasons behind investment decisions and/or decision to invest elsewhere which can assist a region develop a strategy to improve investment and growth moving forward.

Unfortunately, investment enquiries across the seven North Wales planning authorities are currently monitored and managed in different ways and therefore one single up to date and accurate record of enquiries and decisions does not currently exist. Despite this, we have been able to source some broad inquiry data from work which is currently on-going within the region. This data is summarised in Table 2.

Table 2 North Wales Inward Investment Enquiries

Broad Sector	No. Enquiries (12 months to Jan 2014)
Services	18
Manufacturing & Engineering	21
Tourism/Retail/Leisure	9
Energy & Environment	15
Telecoms	3
Food	4
Distribution & Logistics	3

Source: Ashley Godfrey

The data shows enquiry rates to be highest within the manufacturing and engineering sector alongside service industries and businesses within the energy and environment sector, broadly reflecting current sector strengths and priorities in place to encourage investment in the region.

2.2.5 Connectivity

Connectivity is a key consideration in any business location decision. This can be viewed on two scales, connectivity within the region and connectivity to other major cities and UK destinations.

Within the region, connectivity is strong with the A55 corridor providing the key transport network and enabling commuting across the region. For example, using this road network it is possible to travel between Holyhead and Flintshire in approximately 1 hour 20mins. The geography and connectivity of the region therefore provides opportunity for regional benefits from investment and the North Wales Planning Authorities should seek to capitalise on investment through ensuring employment opportunities are promoted throughout the widest travel to work area.

Given the scale of the strategy area, connectivity to other major cities and destinations in the UK varies considerably; with travel time increasing as you move further west across North Wales. The tables below summarise some key travel time information for the locations of Holyhead, Llandudno and Wrexham.

Table 3 Holyhead Connectivity

Destination	Distance ⁷ (Miles)	By Road ⁸ (hr:min)	By Rail ⁹ (hr:min)
Liverpool	93	01:46	02:32
Manchester	119	02:05	02:51
Birmingham	175	02:52	03:26
Cardiff	283	04:29	05:57
London	289	04:46	04:12

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

Table 4 Llandudno Connectivity

Destination	Distance (Miles)	By Road (hr:min)	By Rail (hr:min)
Liverpool	54	01:08	01:43
Manchester	80	01:27	01:59
Birmingham	136	02:14	02:24
Cardiff	244	03:51	04:32
London	250	04:08	03:10

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

⁷ Distance calculation using <https://maps.google.co.uk>

⁸ Drive times calculated using <https://maps.google.co.uk>

⁹ Rail time calculated using quickest advertised journey/route by National Rail

Table 5 Wrexham Connectivity

Destination	Distance (Miles)	By Road (hr:min)	By Rail (hr:min)
Liverpool	34	00:48	01:09
Manchester	53	01:04	01:43
Birmingham	70	01:35	01:42
Cardiff	139	03:12	02:57
London	184	03:33	02:46

Source: National Rail Enquiries (train times) Google maps (distance & drive time)

By Air and Sea

Alongside connections by road and rail the region also benefits from a number of connections by air and sea.

Anglesey Airport is located at RAF Valley, less than two miles from the A55 expressway. The airport offers twice daily flights (Monday to Friday) linking Anglesey with Cardiff, providing a strategic link between North Wales and Wales' Capital City.

Alternatively, Manchester Airport provides an important access point for the UK from Europe, Asia and America and offers easy access to North Wales, located between 50 and 120 miles from North Wales as shown in section 2.2.5.

Liverpool John Lennon Airport also provides an important link for North Wales offering flights to a large number of European destinations.

Alongside these flight links, the region also benefits from the Port of Holyhead which is operated by Stena Line Ports Ltd. The port provides strategic links to Ireland for both passenger and freight movements and is also a call location for a number of cruise vessels.

Digital Connectivity

Through the continuing roll out of the Welsh Government's Superfast Wales Initiative the whole North Wales region will benefit from excellent digital connectivity by 2016. Roll-out has begun in Denbighshire, Flintshire, Gwynedd and Anglesey while Conwy and Wrexham will benefit during 2014 and the remainder of the region will be upgraded by 2016.

2.2.6 Lifestyle

North Wales offers a diverse geography which includes a number of main towns along with rural villages and coastal towns. The region prides itself on its natural environment and its heritage, providing a high quality of life for residents and visitors alike. The lifestyle offer links to the regions strong tourism sector with the Snowdonia National Park central to the region and a number of resort towns providing more traditional seaside destinations and activities.

3 The Future Potential for North Wales

3.1 Priority Sectors in North Wales

The Welsh Government has identified a number of key sectors in which they will support industry-led investment. They have produced a Sector Delivery Plan¹⁰ for these key sectors which sets a number of short, medium and long term priorities for each sector.

This section of the strategy provides a brief overview of the opportunities within these sectors in the context of North Wales, firstly exploring trends in the key sectors, drawing out historical strengths, prior to exploring each of the nine economic sectors in more detail, identifying priorities or programmes within the region which are likely to influence future sectoral growth. The section concludes with a summary of sectoral forecasts which were produced for Arup by Experian Economics. A copy of the forecasts by local authority and a summary for North Wales can be found in Appendix C.

3.1.1 Historic Sectoral Strengths

We have considered there to be a number of factors in assessing North Wales' sectoral strengths. This includes location quotient and levels of employment growth as described below:

- **Location Quotient** – identifies how a sector is performing relative to national (Wales) benchmarks. For example, sectors with a high (e.g. above 1) location quotient are outperforming when compared with the sector in the rest of Wales, whereas sectors with a lower location quotient (e.g. below 1) are underperforming when compared to Wales as a whole.
- **Employment** – identifies overall employment within the key sectors in 2009 and 2012 and looks at absolute change (growth/decline) in employment over this period. This also identifies sectors that are supporting high levels of employment.

An analysis of the relationship between these two dimensions provides a useful indication of the main opportunity sectors in North Wales.

Table 6 North Wales change in employment in key sectors 2009-2012

Sector	2009 Employment	2009 LQ vs Wales	2012 Employment	2012 LQ vs Wales	Absolute Change 2009-12	% Change 2009-12
Advanced Materials and Manufacturing	22,401	1.32	22,815	1.33	2%	0%
Construction	18,273	1.06	15,641	1.03	-14%	-3%
Creative Industries	3,917	1.13	3,812	1.22	-3%	8%
Energy and Environment	26,724	1.00	23,577	0.94	-12%	-6%
Finance and	24,592	0.82	24,368	0.82	-1%	0%

¹⁰ Welsh Government, Department for Business, Enterprise, Technology and Science: Sector Delivery Plan <http://wales.gov.uk/docs/det/publications/130125deliveryplanen.pdf>

Sector	2009 Employment	2009 LQ vs Wales	2012 Employment	2012 LQ vs Wales	Absolute Change 2009-12	% Change 2009-12
Professional Services						
Food and Farming	7,765	1.63	7,849	1.59	1%	-3%
ICT	5,060	0.99	5,161	0.98	2%	-1%
Life Sciences	3,075	1.72	4,073	1.90	32%	11%
Tourism	33,006	1.25	36,142	1.27	10%	1%

Source: Business Register and Employment Survey, ONS 2009 & 2012

Note: Sector definitions are based on those compiled by Stats Wales (See Appendix A)

The data above shows that across North Wales only the life sciences sector has experienced growth (2009-2012), together with a relative concentration of employment (when compared to Wales as a whole):

- **Life Sciences:** a LQ of 1.9 in 2012 (1.72 in 2009) and an increase in employment of 32%.

In addition to this, the following sectors have experienced overall employment growth between 2009 and 2012 and have a positive location quotient (indicating that they have a strong presence relative to Wales):

- **Advanced Materials and Manufacturing:** employment increase of 2% between 2009 and 2012 and a positive location quotient in 2012 (1.33);
- **Food and Farming:** employment increase of 1% between 2009 and 2012 and a positive location quotient in 2012 (1.59); and
- **Tourism:** employment increase of 10% between 2009 and 2012 and a positive location quotient in 2012 (1.27).

The analysis also identifies sectors where North Wales continues to have a relative concentration of employment but where employment has declined between 2009 and 2012. These include:

- **Construction:** a location quotient of 1.03 in 2012 but employment declined by 14% between 2009 and 2012; and
- **Creative Industries:** a location quotient of 1.22 in 2012 but employment declined by 3% between 2009 and 2012.

Finally, the analysis shows that the remaining three sectors do not have a relative concentration when compared to Wales and have either experienced a decline or slight increase in employment. This information is analysed further in section 3.1.2 which seeks to understand whether these trends are likely to be a long term trend.

- **Energy and Environment:** a location quotient of 0.94 in 2012 and a decline in employment of 12% between 2009 and 2012;
- **Finance and Professional Services:** a location quotient of 0.82 and a 1% decline in employment between 2009 and 2012; and
- **ICT:** a location quotient of 0.98 but an increase in employment of 2% between 2009 and 2012.

Further information about each of these sectors in the North Wales context is provided below. This analysis includes details of specific projects and programmes which are likely to influence the direction of these sectors moving forward.

3.1.2 Sector Analysis

The sectoral analysis below identifies where key strengths exist, highlights existing clusters of investment and builds on the information provided in Table 6. Employment in each of the priority sectors is shown geographically for the region in Appendix B.

Advanced Materials and Manufacturing

The advanced materials and manufacturing sector employed 22,815 people in 2012 and has experienced slight growth since 2009. The sector maintains its position as one of the most important sectors in North Wales and also continues to have a relative concentration of employment (when compared to Wales as a whole) with a LQ of 1.33 in 2012.

Supporting these trends is a diverse business base across North Wales with a specific focus in the North East where the LQ is over 2 when compared to Wales as a whole. North Wales has particular strengths in the sub-sectors of aerospace and defence, automotive and opto-electronics. Of the 12 companies in North Wales included on the Welsh Governments Anchor Company list, six are within this sector and include:

- Airbus (Aerospace) – Wing assembly at Broughton, Flintshire and a small element of distribution (circa 5%) from the Port of Mostyn, Flintshire.
- Toyota Motor Manufacturing (UK) Ltd (Automotive) – Engine plant at Deeside, Flintshire.
- Qioptiq Limited (Opto-Electronics) – St Asaph, Denbighshire.
- JCB Transmissions (Automotive) – Wrexham.
- Tata Steel Europe (Manufacturing) – Shotton Works, Deeside.
- United Paper Mills (Manufacturing) – Shotton, Deeside.

Anecdotal evidence through consultation suggests strong growth within the sector more recently and the sector continues to benefit from strong support from both the Welsh and UK Governments. Within North Wales, the following programmes seek to further strengthen this sector and support growth moving forward:

- Development of the Science Park at Gaerwen on Anglesey;
- The Thornton Research and Technology Campus at Chester; which also serves North Wales, providing an important facility; and
- The Advanced Manufacturing Centre proposed as part of the Deeside Enterprise Zone.

While this sector is likely to continue its focus on the North East of the region moving forward, the strategy should seek to increase opportunities for the rest of the region emerging as part of supply chain opportunities and/or working together in order to make employment opportunities within the major employers within the sector accessible to the wider region.

Construction

The construction sector has been historically important to the North Wales economy with some key regional and national employers. Although the sector has had to respond to market challenges over recent years, the improving economic situation and projects such as Wylfa will see the sector become increasingly prominent in the short to medium term as a supportive sector, helping to facilitate growth in the wider economy.

The region is home to Redrow plc which was added to Welsh Government Anchor Companies list in January 2014.

The nuclear new build programme on Anglesey will bring a large number of construction related opportunities. Hitachi anticipate the creation of between 5,000 and 6,000 direct jobs during construction with a further 1,000 jobs upon operation.

Other projects such as the recently announced super prison in Wrexham will also lead to significant construction employment and training opportunities for the region.

Creative Industries

The creative industries sector in Wales is diverse and includes companies ranging from software development, games and animation, to high-end film and television production, music and journalism. At present, the large employers in the sector tend to be focussed in South Wales, clustering around key employers such as BBC Wales and production companies such as Tinopolis.

Despite this, the North Wales region is home to companies such as Cwmni Da, Gwynedd and may benefit from future location choices of S4C, who recently announced a potential change in headquarter location. The region is also home to a number of smaller scale creative industry based businesses.

This sector has a clear role within the region, creating a good business base which may attract larger investors while also including many companies that may require flexible business space across the region.

Energy and Environment

Despite figures for North Wales (Table 6) suggesting a decline in this sector between 2009 and 2012, investment and development in the energy and environment sector remains a focus for the North Wales region.

Current strategic projects and initiatives include the designation of Ynys Mon and Snowdonia Enterprise Zone as energy related Enterprise Zones; off-shore wind farm development along the North Wales coast; potential nuclear new build at Wylfa; and wider programmes such as the 'Energy Island Programme'.

The region contains leading energy based companies, many of which are included on the Welsh Government Anchor Company list:

- Sharp Manufacturing Company, Wrexham;
- RWE npower, Mostyn;
- Centrica, Anglesey; and
- Hitachi at Wylfa.

Alongside these employers, Welsh universities offer a range of courses specific to the needs of the energy and environmental sectors with long-term industrial linkages. Glyndwr University's Centre for Solar Energy Research researches industrial processes for PV manufacture, while at Bangor University the Sustainable Environment Research Centre has an international reputation for research into generating energy from waste. The university also leads a research and development group for the Anglesey Energy Island initiative.

Swansea University is also active in North Wales, supporting the operation of the Sustainable Building Envelope Centre at Tata Steels Shotton site.

The region is anticipated to see a rise in employment in the Energy and Environment sector in the medium term due to nuclear developments of Wylfa and programmes and priorities in place.

Finance and Professional Services

Financial and Professional Services (F&PS) is one of Wales' largest and fastest growing sectors. While a number of the key employers in the sector are located in South Wales with a focus on the M4 Corridor between Newport and Swansea, North East Wales has also had some success attracting firms including Moneysupermarket.com, which originated in Flintshire and Avox. With advancements in physical and digital infrastructure in Wales and planned roll out of high speed broadband by 2015, this sector has the potential to continue to grow within the region.

Alongside the businesses mentioned above, Bangor University has established itself as the number one institution in the UK for accounting, banking and financial research¹¹ offering opportunities for academic-business linkages in the sector.

Food and Farming

The recent Deloitte guide to investing in Wales¹² reported that the food and farming sector has the largest economic impact of any of the sectors in Wales, with a value of £6.5 billion in sales to the Welsh economy. When calculated with its whole supply chain the sector is estimated to employ approximately 230,000 people.

The North Wales region contains a number of key companies within the Welsh food and farming sector and has seen a number of recent investments, which reflect the prominence of the sector in the region. Farmers Boy in Deeside invested heavily in their facility in 2012 and The Village Bakery in Wrexham invested in its production line in 2013. Both projects received support from the Welsh Government. Two Sisters Food Group also has bases in Deeside and Llangefni and is a subsidiary of Boparan Holdings who are included on the Welsh Government Anchor Company list.

Alongside these existing companies and investments, the sector also contains examples of strong academic/industry collaboration. In the North Wales region the Food Technology Centre in Llangefni is one of three food centres in Wales providing technical and practical advice and services to Welsh companies in the sector.

¹¹ UK University Research Assessment Exercise

¹² Deloitte, A Guide to Investing in Wales, August 2013

ICT

Whilst identified as a key sector in Wales, the Information and Communication Technologies (ICT) industry has largely established its base in South Wales with companies such as BT, Sony and Monitise choosing South Wales as their business location. Opportunities for investment in North Wales continue to be sought and may build on BT's programme to roll out broadband to all rural locations throughout Wales.

Life Sciences

The life sciences sector continues to grow in Wales with 55 new companies located in Wales over the last five years. The North Wales region contains a number of key employers within the sector, including Siemens Healthcare Diagnostics Products, Llanberis; ConvaTec Ltd, Deeside; and Nice-Pak International, Flint.

Alongside its development and manufacturing facilities, ConvaTec also has its global research and development for wound care products in North Wales. In order to support the sector the Welsh Government announced the Life Sciences Investment Fund in 2012. This £100 million fund seeks to invest in Life Sciences and related medical, pharmaceutical and healthcare companies in Wales.

At both a national and regional level, this sector saw a significant increase in employment between 2009 and 2012. In North Wales, however, this increase is large relative to the rest of the country, and this is probably due to the developments in and around Bangor University.

Tourism

The Tourism sector continues to make a valued contribution to the Welsh economy and is a key sector for many parts of the North Wales region, particularly with the presence of the Snowdonia National Park, the many resort towns such as Llandudno and key visitor attractions such as Portmeirion, and castles at Caernarfon, Conwy, Beaumaris and Harlech, forming an integral part of the World Heritage Site.

The sector relies heavily on the high quality of the natural environment in the region, along with the rich heritage and culture offered by many destinations.

At both a national and regional level, the sector has experienced steady growth in employment and this is expected to continue across the board as tourism has historically been a strategic priority for the Welsh economy.

3.1.3 Sectoral Growth Forecasts

As part of the evidence base for this strategy Experian Economics were commissioned in February 2014 to prepare employment forecasts for the North Wales region based on the nine priority sectors as defined by Welsh Government (Appendix A).

The employment forecasts were prepared at the local authority level up to 2031 and utilise a number of key datasets, including:

- Experian's Regional Planning Service (RPS) Full Time Equivalent (FTE) estimates and forecasts for relevant local authorities;

- Experian's 4 digit Standard Industrial Classification (SIC) FTE forecasts for Wales; and
- Business Register Employment Survey (BRES) 4 digit SIC data for local authorities.

The forecasts include estimates for the Snowdonia National Park Authority (SNPA) as a non-standard geography which has been produced by using data on business unit by industrial sector at the MSOA level, generating shares that were used to disaggregate the local authority forecasts for Gwynedd and Conwy to SNPA.

No forecasts are ever 100% certain, and while the technical approach used to inform the strategy is robust, they can fail to pick up local demand factors relating to, for example, specific sector investments. Despite this, Table 7 presents the overall forecast employment growth across all sectors for North Wales to 2031.

Table 7 North Wales Employment Growth

	Total Change	
	2009-2012	2013-2031
North Wales	4,335	3,401

Source: Experian Economics (February 2014)

Table 8 provides a summary of the Experian forecasts by sector. It is important to note that these figures should be treated with a degree of caution as they are very sensitive to local factors. They should only therefore be considered as an indication of the likely scale of long term growth rather than certain growth figures for the region.

The figures show that between 2014 (as a base year) and 2031, employment numbers in key sectors across North Wales are projected to vary with a general forecast of decline in certain sectors and steady growth in others. The full set of forecasts which are split by local authority areas are included in Appendix C. These forecasts should be viewed where more local level information is required. We have included below a summary of the general trends within the sectors in five year blocks to 2031 and illustrated forecasts in Figure 2.

Table 8 North Wales Employment Change in Key Sectors (thousands)

	Change 2014-19	Change 2019-24	Change 2024-29	Change 2014-31
Advanced materials & manufacturing	-1.1	-2.4	-2.1	-6.3
Construction	1.4	0.5	0.5	2.7
Creative Industries	0.3	0.0	0.0	0.4
Energy and environment	1.2	0.0	0.2	1.6
Finance and Professional Services	0.8	-0.3	-0.1	0.5
Food and Farming	0.0	-0.2	-0.1	-0.4
ICT	0.2	-0.1	-0.1	-0.1
Life Sciences	-0.2	-0.4	-0.3	-1.0
Tourism	1.7	0.9	0.7	3.6
North Wales Total	4.3	-1.9	-1.2	0.9

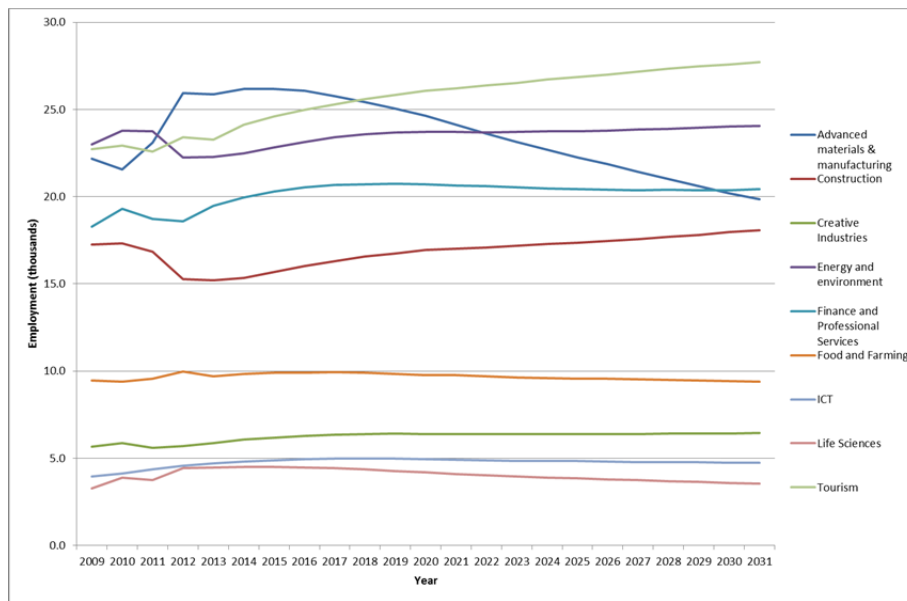
Source: Experian Economics (February 2014) & Arup

Table 9 North Wales Percentage Employment Change in Key Sectors

	% change 2014-19	% change 2019-24	% change 2024-29	% change 2014-31
Advanced materials & manufacturing	-4%	-9%	-9%	-24%
Construction	9%	3%	3%	18%
Creative Industries	6%	0%	0%	6%
Energy and environment	5%	0%	1%	7%
Finance and Professional Services	4%	-1%	-1%	2%
Food and Farming	0%	-2%	-1%	-4%
ICT	3%	-2%	-2%	-1%
Life Sciences	-5%	-9%	-7%	-21%
Tourism	7%	3%	3%	15%
North Wales Total	3%	-1%	-1%	1%

Source: Experian Economics (February 2014) & Arup

Figure 2 Employment Trends by Sector (2009-2031)



The data shows that employment growth is being driven by the construction, tourism, energy and environment and creative industries sectors.

Employment decline is predicted to occur most heavily in the advanced materials and manufacturing and life sciences sectors with a projected loss of 6,300 jobs and 1,000 jobs respectively.

Employment Space Requirements

Using these sector based forecasts we can translate the total number of additional jobs into a floorspace requirement using standard densities¹³.

This process makes assumptions around the proportion of employment in each of the sectors that would be in the B1, B2 or B8 use class. These assumptions are based on the standard definition of these use classes with the four digit SIC data transposed into two digit data in order for the 'B' use classes to be identified within each of the nine key sectors. The percentage of the sector which falls within the 'B' use classes has therefore been identified in Table 10. We are then able to calculate a net number of jobs and apply the appropriate densities in order to calculate floorspace required. Where no additional jobs are forecast (i.e. decline in employment) no new floorspace requirement has been anticipated.

The table below provides a summary of the floorspace requirements for each sector to 2031.

Table 10 Employment Space Requirements (2014 to 2031)

Key Sector	Workforce Growth (No.)	Proportion in 'B' Space (%)	Net Jobs (No.)	Floorspace per Job (sqm)	Floorspace Required (sqm)
Advanced Materials & Manufacturing	-6,325	100%	-6,325	36	n/a
Construction	2,718	97%	2,648	38.7	102,399
Creative Industries	366	67%	246	17.4	4,289
Energy & Environment	1,570	76%	1,195	21.3	25,465
Finance & Professional Services	451	75%	336	9.0	3,011
Food & Farming	-436	0%	0	n/a	n/a
ICT	-67	100%	-67	36	n/a
Life Sciences	-962	100%	-962	31.8	n/a
Tourism	3,603	23%	814	4.5	3,645
Divided by Development Floorspace per Ha					3,000
Equivalent Employment Land Need					46.3

Source: Experian Economics (February 2014) and Arup

This median (forecast) scenario shows a fairly low growth within the nine key sectors with an additional 46.3 ha of employment land required to 2031. It must be recognised that this will support growth in the key sectors as defined in Appendix A and does not account for growth in other areas of the economy which will also continue.

Using this median scenario from the forecast data, we have below applied a growth to the forecasts in order to create a high growth scenario which accounts for the priority programmes and projects in place across the region. In particular this includes:

- Enterprise Zones;
- Energy Island Programme;

¹³ Homes and Communities Agency, Employment Densities Guide (2nd Edition) (2010)

- Nuclear new build at Wylfa; and
- Support for the advanced materials and manufacturing sector.

In order to reflect these developments and priorities we have factored employment growth by either 10 or 20% as detailed in table 11.

Table 11 High Growth – Employment Space Requirements (2014 to 2031)

Key Sector	Workforce Growth (No.)	High Growth	Proportion in 'B' Space (%)	Net Jobs (No.)	Floorspace per Job (sqm)	Floorspace Required (sqm)
Advanced Materials & Manufacturing (+20%)	-6,325	-5,060	100%	-5,060	36	n/a
Construction (+20%)	2,718	3,262	97%	3,164	38.7	122,447
Creative Industries (+10%)	366	403	67%	270	17.4	4,698
Energy & Environment (+20%)	1,570	1,884	76%	1,432	21.3	30,502
Finance & Professional Services (+10%)	451	496	75%	372	9	3,348
Food & Farming (+10%)	-436	-392	0%	0	n/a	n/a
ICT (+10%)	-67	-59	100%	-59	36	n/a
Life Sciences (+10%)	-962	-866	100%	-866	31.8	n/a
Tourism (+20%)	3,603	4,323	23%	994	4.5	4,473
Divided by Development Floorspace per Ha						3,000
Equivalent Employment Land Need						55.16

This high growth scenario shows a requirement for 55.16 ha to 2031, reflecting a greater demand in certain key sectors in which strategic projects and programmes are likely to influence investment decisions.

For the purposes of the strategy, it is this higher forecast that will be used.

3.2 Summary

This section has provided a review of the nine key sectors in view of their historic performance within North Wales as well as their performance relative to the rest of Wales. The section has also introduced employment forecasts for the nine sectors as provided by Experian Economics.

This review has provided a mixed message for the region, alongside priorities and programmes which aim to grow and develop certain sectors within North Wales (e.g. Energy).

The review does not take account of these priorities and programmes and therefore must be read as a worst case scenario based on historic trends within the sectors (2009-2012) and how wider regional and national trends are likely to influence the given sectors within the region to 2031. This median scenario has shown a predicted growth in jobs across all sectors of 918 to 2031. When considered in terms of jobs within the 'B' use classes the forecast shows a negative growth of -2,115 jobs.

In the high growth scenario (+10 or +20% on forecast) a predicted additional 3,991 jobs will be created to 2031, a growth rate of 249 per annum across the

region within priority sectors. However, when looking at the proportion of these jobs in 'B' use classes, the high growth scenario leads to an additional 197 jobs.

The analysis therefore shows limited demand for strategic employment land across the region. Whilst this does not inhibit large scale investors choosing North Wales as an investment location, it brings a focus to the supply requirements, suggesting that efforts across North Wales should be placed on ensuring that a small portfolio of strategic employment sites are identified to meet the needs of future investment.

The growth trends identified by the nine key sectors have therefore informed the strategy presented in Section 5. Summaries for each of the nine sectors with the typical site and premises requirements within that sector are presented in Table 12 overleaf.

Table 12 Sector Summary - Employment Forecasts

Sector	Assessment	Forecast Employment Change 2014-2031 (North Wales)	Site and Premises Requirements
Advanced Materials & Manufacturing	<p>Significant Potential to retain existing strategic employers and grow the supply chain opportunities for North Wales.</p> <p>Focus should be on creating higher value employment within the sector, linked to key sub-sectors (e.g. Aerospace and Automotive).</p>	<ul style="list-style-type: none"> • Sector is forecast to decline by approximately 6,300 jobs to 2031. • Trend aligned to more general manufacturing rather than high value activities. • Focus aligned to the aerospace and automotive sub-sectors as well as opto-electronics. • The R&D and testing sub-sector is also likely to be key for the region moving forward. • The recent trend in ‘re-shoring’ back to the UK and initiatives around the ‘made in Britain’ campaign may offer further potential for the sector. 	<ul style="list-style-type: none"> • Proximity to existing skilled workforce • Generally a large plot and/or purpose built premises • Good communications and access to growing markets • Quality work environment • Government support
Construction	<p>Anticipated growth to support key projects (e.g. Wylfa Newydd) and growth in other sectors.</p> <p>Limited requirement for strategic employment land to service job growth</p>	<ul style="list-style-type: none"> • Sector is forecast to grow by approximately 2,700 jobs to 2031. This does not account for construction employment associated with Wylfa Newydd. • The sector offers potential employment growth opportunities, particularly following a period of decline within the industry. However, this is unlikely to lead to increased demand for strategic employment sites across North Wales. The sector is not as reliant on a land supply for its own needs to support growth. 	<ul style="list-style-type: none"> • Limited demand for strategic sites. • Employment land demand limited to office and support functions (e.g. storage).
Creative Industries	<p>Potential but unlikely to focus on strategic employment sites.</p> <p>May lead to some requirement for flexible, B1 type employment space.</p>	<ul style="list-style-type: none"> • Sector is forecast to experience limited growth of 366 jobs to 2031. • Potential investment interest in the region with the likes of S4C and other Welsh language providers. • Other growth in the sector likely to be small scale, reflecting the prominence of micro and small scale lifestyle businesses in this sector. This is likely to lead to demand within existing ‘local’ employment sites, town centres and for the re-use of old buildings etc. 	<ul style="list-style-type: none"> • High propensity to cluster • Low operating costs & flexible leases can be important • Quality of environment and working space • Presence of higher and further education establishments • Sector has seen increased home working • Internet connectivity increasingly important for communication and sales • Software and digital elements require access to

Sector	Assessment	Forecast Employment Change 2014-2031 (North Wales)	Site and Premises Requirements
Energy and Environment	Significant potential linked to forecast growth and key priorities and programmes – employment land requirements likely to focus on energy supply chain and research and development.	<ul style="list-style-type: none"> • Sector is forecast to grow by approximately 1,600 jobs to 2031. This does not allow for anticipated growth associated with Wylfa Newydd or the Energy Island Programme. • Significant potential due to existing priorities and programmes. • Supply chain opportunities for the energy and environment sector and other sectors (e.g. construction) in relation to Wylfa Newydd. 	<p>advanced technologies</p> <ul style="list-style-type: none"> • Propensity to cluster • Proximity to end user if part of a supply chain • High quality facilities • Access to higher and further education for research and development • Government funding often important • Limited requirement for large scale strategic sites unless from a specific end user (e.g. Lateral Power)
Finance and Professional Services	Potential likely to focus on demand for serviced, purpose built office space in areas around key centres of populations.	<ul style="list-style-type: none"> • Sector is forecast to grow by approximately 451 jobs to 2031. • The recent trend in ‘re-shoring’ may offer further potential for the sector, particularly around the call centre and support type investment that was ‘off-shored’ over the last few years. 	<ul style="list-style-type: none"> • High quality facilities, especially important for HQ • Access to facilities for staff • Proximity to labour pool • Transport links for staff (including public transport) • Quality work environment • Broadband infrastructure
Food and Farming	Potential – need to retain existing employment base in the region and potential for further process and distribution based businesses surrounding local produce.	<ul style="list-style-type: none"> • Sector is forecast to see a decline of approximately 440 jobs to 2031. • Employment land demands from the sector relate largely to the investors market focus and distribution requirements. • The strategy should offer a range of employment locations which are suitable for this sector, focussed around road, rail and port connections & interchanges. 	<ul style="list-style-type: none"> • Close to major motorway links, rail links or ports depending on distribution needs • Purpose built facilities for process and packaging • Cost sensitive
ICT	Potential which is likely to focus on flexible space and/or purpose built office accommodation.	<ul style="list-style-type: none"> • Sector is forecast to see very slight decline (approximately 70 jobs) to 2031. 	<ul style="list-style-type: none"> • High quality facilities • Access to high quality broadband infrastructure • Low operating costs relative to London becoming increasingly important • Quality of work environment

Sector	Assessment	Forecast Employment Change 2014-2031 (North Wales)	Site and Premises Requirements
			<ul style="list-style-type: none"> Increased home working for smaller scale firms is increasing need for flexible use of premises.
Life Sciences	Potential with any focus likely to be around purpose built facilities.	<ul style="list-style-type: none"> Sector is forecast to decline by approximately 960 jobs to 2031. Sector currently has a presence in a number of locations across the region. Location of new development likely to be driven by investor needs and demands. 	<ul style="list-style-type: none"> High propensity to cluster Access to leading technologies and innovative environments Presence and partnerships with universities Skilled workforce Quality environment Often require government support
Tourism	Significant potential but limited requirements for strategic employment land.	<ul style="list-style-type: none"> Sector is forecast to see string growth of approximately 3,600 jobs to 2031. Key sector which supports development in other sectors, adding to the lifestyle opportunities within the region. 	<ul style="list-style-type: none"> Limited strategic site requirements

4 Supply Assessment – Review of Strategic Sites

This section considers the potential supply of strategic employment sites across North Wales, setting a definition for strategic sites and then considering the suitability and performance of a number of sites against set criteria.

4.1 Defining Strategic Sites

Having estimated the overall forecast land requirement for North Wales for the nine priority sectors it is important to define strategic sites and consider what proportion of the overall land requirement of the priority sector growth will require ‘strategic employment land’.

Previous studies of this nature have focused on size (e.g. sites greater than 10 ha) and/or significance (in terms of sectoral growth prospects) in order to define a strategic site.

Such definitions are fairly rigid, offer limited flexibility as sites and the region develops over time, and do not recognise the often varying needs of sectors and investors who choose to locate within the different geographies of a region. Previous work by Arup¹⁴ has sought to further define the meaning of a strategic site, recognising variance in the definition depending on the context. Using the findings of this previous study and considering the needs of the North Wales region, the following hierarchy of strategic employment sites is proposed:

Figure 3 Hierarchy of Strategic Employment Sites

Regional Strategic Sites	Sites of regional importance with a critical role in achieving regional and contributing to national economic development objectives, supporting key sector development.	Primary Site – site of sufficient scale and offering potential for significant investment.
Sub-Regional Strategic Sites	Sites with a more general and localised focus for economic development than regional strategic sites with a focus on attracting employers that draw a workforce from wider than the local area.	Secondary Site – Strategic sites that will support more indigenous growth and medium scale investment.
Regional Gateway and Logistics Sites	Airports, ports and logistics sites that offer sustainable passenger and/or freight distribution, serving more than a local market.	Inward Investment – a site suitable for attracting and accommodating a single inward investor.

¹⁴ Arup (2009), Strategic Employment Site, Chapter 2, East of England Development Agency with the East of England Regional Assembly.

This hierarchy defines sites by role and function and subsequently by site potential. The definitions identified above are discussed in further detail below and utilised in the formation of the strategy for North Wales.

Regional Strategic Sites

These are defined as sites of regional importance that will be critical to achieving regional and contributing to national economic development objectives. The sites will have a sector focus and be capable of supporting key sector development, business incubation and encouraging university / higher education investment in education and training within the region.

The sites will provide high quality locations for both local and inward investment, and are intended to be long term development options, capable of development over the proposed 20 year strategy period. These sites will require focussed management and support by the North Wales Planning Authorities to ensure they develop as leading edge 'branded' employment locations, that take a long term perspective and avoiding incompatible uses that undermine the long term success of the sites.

The key characteristics of regional strategic sites are:

- Sites with a clear identity/brand and future vision within the region;
- Good road and public transport accessibility;
- Attractive to national and international investors; and
- Supportive of specific sectoral needs.

Sub-regional Strategic Sites

These sites will have a more general and localised focus for economic development than would be expected on regional strategic sites, however, they will be of strategic importance to delivering the aspirations of an individual area or a collection of areas. A group of sub-regional strategic sites may when grouped together constitute an area of regional strategic importance.

Sub-regional strategic sites can be differentiated from local employment sites, as promoted in local development plans, in terms of scale, their sub-regional functions, and focus on attracting employers that draw a workforce from wider than the local area. Sub-regional strategic sites should also enjoy good accessibility to the key markets, services and facilities of the wider region. These sites should provide an attractive environment for investment..

The key characteristics of sub-regional strategic sites are:

- Attractive to businesses with a sub-regional focus;
- Draw a workforce from wider than the local area (e.g. serve wider than a local authority area);
- Offer sector specific employment alongside more general employment space;
- Good road and public transport accessibility within a defined FEA; and
- Support regional economic development objectives.

Regional Gateway and Logistics Sites

These sites are defined as airports, ports and logistics sites that offer sustainable passenger and/or freight distribution, serving more than one local market. These are locations that serve to facilitate economic development and trade.

The key characteristics of regional gateway and logistics sites are:

- Good rail and road access;
- Inter-modal terminals;
- Strategic demand for freight / distribution;
- Strategic demand for passenger travel; and
- Opportunity to accommodate users associated with the terminal, requiring physical proximity.

Local Employment Sites

It is recognised that the definition of what constitutes a strategic site will vary significantly depending on context. Thus for a particular local authority area, a site may be defined as strategically important in its local context but may not be considered strategically important in the wider regional context. Therefore a site designated within an ELR or LDP as a strategic employment site, will not necessarily be considered of regional significance although locally it may be important. Such a site would be classified as a 'Local Employment Site' for the purposes of this strategy and would be distinguishable from the Strategic Site definitions described above.

4.2 Selecting a Portfolio of Strategic Sites

In order to identify a portfolio of strategic employment sites, the strategy identified a 'long list' of sites based on the following criteria:

- Sites currently defined as strategic sites at the local level;
- Other large scale or strategically located sites contained within adopted plans;
- Sites proposed as part of the LDP process;
- Sites with existing key employers; and
- Sites which align to the settlement hierarchy and offer potential for future growth.

The current development plans for the seven North Wales authorities do not present a standard definition of a strategic site and therefore sites were identified on the basis of the definition at the relevant local authority level.

The 'long list' identified 34 sites across North Wales which were considered to offer potential for strategic investment across the key sectors moving forward.

This 'long list' was further appraised in order to identify a 'short list' of sites. This appraisal explored the potential of the sites in terms of available land, headline constraints to future development and proximity of other available land.

Consideration was also given to the potential for clustering of sites to create a strategic employment locations.

The short list which emerged following this appraisal includes 23 sites/clusters.. These are summarised in Table 13 and Figure 4 below.

A pro-forma of each site is provided in Appendix D.

Table 13 Strategic Employment Portfolio

Ref	Site Name	Gross Area (ha)	Available (ha) ¹⁵
1	Wrexham Industrial Estate	491.7	77.1
2	Wrexham Technology Park & Ruthin Road	20.5	20.5
3	Llay Industrial Estate	102	40
4	Deeside Enterprise Zone Cluster	203.3	203.3
	Northern gateway	98	98
	Land North & East of Shotton Paper	60	60
	Deeside Industrial Park	11.6	11.6
	Chester Aerospace Park & Hawarden Park Extension	33.7	33.7
5	Warren Hall	36.5	36.5
6	St Asaph Business Park & Bodelwydden	191.1	40
7	Tir Llwyd	27.9	27.9
8	Mostyn Docks	4.8	4.8
9	Llanbedr	228	31.4
10	Trawsfynydd	150.4	50
11	Mochdre Commerce Park	10.3	5
12	Abergele South East	18.6	3.7
13	NE of Former Goods Yard	0.4	0.4
14	Anglesey Aluminium	92	54 ¹⁶
15	Holyhead Port	98	10
16	Penrhos Industrial Estate	10	3.5
17	Parc Cybi	108	53
18	Former Shell Site (Rhosgoch)	82	82
19	Gaerwen Industrial Estate	115	22
20	Cibyn Industrial Estate	37.6	7.31
21	Llangefni Cluster	82	43
	Bryn Cefni Business Park	57	18
	Creamery Land & Lledwigan Farm	25	25
22	Parc Menai	24.7	6.3
23	Parc Bryn Cegin	35.9	35.9
TOTAL		2,171	803.6

Some of the sites identified above have extant consents or identified commitments on them which would render part or all of the site unavailable as part of any supply moving forward within the strategy period. These sites and proposals include:

¹⁵ This figure represents the latest available developable area figure. It is recognised that land availability changes constantly and therefore this provides an approximate availability only.

¹⁶ 54ha taken up by Lateral Power proposals

- **Northern Gateway (98ha)** – Site has outline consent for a large scale mixed use scheme;
- **Holyhead Port (10ha)** – Proposals for the Holyhead waterfront development were given the go ahead in February 2014;
- **Parc Cybi (53ha)** – The first phase of this development has full planning consent and is therefore committed;
- **Former Shell Site Rhosgoch (82ha)** – It is understood that Centrica have identified this site as part of proposals for a converter station associated with the Rhiannon offshore wind farm project.

Should these sites drop out of the supply that forms part of the strategy (243ha), a total strategic land supply of 560.6ha would still be available.

While we have left these sites in the broad appraisal of sites below, the strategy has separated them out as sites which are committed and or have an extant consent.

4.3 Broad Appraisal of Sites

This section provides a broad assessment of the sites/site clusters identified to form part of the employment land strategy.

The information in Table 15 summarises the individual site pro-formas which are contained in Appendix D against a number of site criteria as described below:

- **(Re) development or expansion potential** – does the site offer development land and or opportunities to rationalise/redevelop in order to accommodate strategic investment?
- **Strategic Location/Connectivity** – Is the site within close proximity to the strategic road network and is it well connected in terms of public transport and walking/cycling accessibility?
- **Key Sector Potential** – Is the site suitable for key sector investment? Does/could the site offer the site and premises requirements identified in Table 12?
- **Consistent with Policy** – Is the site consistent with National and Local planning policy. Is the site sustainable?
- **Deliverability (Infrastructure needs)** – Is the site ready to bring to market or does it require infrastructure investment in order to improve deliverability?

In order to provide a summary against these criteria, site scores are provided as outlined in Table 14.

Table 14 Appraisal Categories

Score	Definition
✓✓✓	Excellent fit with the appraisal criteria. For example, the site can accommodate strategic development, currently contains or has will be attractive to key sectors and requires limited infrastructure investment. (Scores 3)
✓✓	Good fit with appraisal criteria. For example, (Scores 2)
✓	Average fit with appraisal criteria. (Scores 1)
X	Poor fit with appraisal criteria or unknown. For example, where site has limited expansion or development potential and requires significant infrastructure investment in order to bring it to market or would require a specific investor and

	therefore potential is unknown. (Scores -1)
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The above scoring has been applied to the sites considered within the strategy below with further detail on each site provided in Appendix D.

Table 15 Summary Site Appraisal

Site Name	(Re) development or expansion potential?	Strategic Location / Connectivity?	Key Sector Potential?	Consistent with Policy?	Deliverability (Infrastructure needs)	Score
Wrexham Industrial Estate	✓✓	✓✓	✓✓✓	✓✓	✓	10
Wrexham Technology Park & Ruthin Road	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓	13
Llay Industrial Estate	✓✓	✓✓	✓✓	✓✓✓	✓✓✓	12
Deeside Enterprise Zone Cluster	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓	14
Warren Hall	✓✓✓	✓✓✓	✓✓	✓✓	✓	11
St Asaph Business Park & Bodelwydden	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓	14
Tir Llwyd	✓✓	✓✓	✓✓	✓✓✓	✓✓✓	12
Mostyn Docks	✓✓	✓✓	✓✓	✓✓✓	✓✓	11
Llanbedr	✓✓✓	✓	✓	✓✓✓	X	7
Trawsfynydd	✓✓	✓	✓✓	✓✓✓	X	7
Mochdre Commerce Park	✓✓	✓✓	✓✓	✓✓✓	✓✓✓	12
Abergele South East	✓✓✓	✓✓✓	✓✓	✓✓✓	✓	12
NE of Former Goods Yard	✓✓	✓✓	X	✓✓✓	✓	7
Anglesey Aluminium	✓✓✓	✓✓✓	✓✓	✓✓	✓✓	12
Holyhead Port	✓✓✓	✓✓✓	✓✓	✓✓✓	✓✓	13
Penrhos Industrial Estate	✓	✓✓	✓✓	✓✓✓	✓✓✓	11
Parc Cybi	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓	14
Former Shell Site (Rhosgoch)	✓✓	✓	X	✓✓	✓✓	6
Gaerwen Industrial	✓✓	✓✓✓	✓✓	✓✓✓	✓✓✓	13

Site Name	(Re) development or expansion potential?	Strategic Location / Connectivity?	Key Sector Potential?	Consistent with Policy?	Deliverability (Infrastructure needs)	Score
Estate						
Cibyn Industrial Estate	✓	✓✓	✓✓	✓✓✓	✓✓✓	11
Llangefni Cluster	✓✓✓	✓✓✓	✓✓	✓✓✓	✓✓	13
Parc Menai	✓	✓✓✓	✓✓✓	✓✓✓	✓✓✓	13
Parc Bryn Cegin	✓✓✓	✓✓	✓	✓✓✓	✓✓✓	12

Site scores have been utilised in order to prioritise sites for the purposes of the strategy. These scores also highlight where sites are likely to require investment prior to them coming to market and being available for strategic employment investment.

Table 16 Summary of Site Scores

Score	Sites
13-15	Wrexham Technology Park & Ruthin Road Deeside Enterprise Zone Cluster St Asaph Business Park & Bodelwydden Holyhead Port Parc Cybi Gaerwen Industrial Estate Llangefni Cluster Parc Menai
10-12	Wrexham Industrial Estate Llay Industrial Estate Warren Hall Tir Llwyd Mostyn Docks Mochdre Commerce Park Abergele South East Anglesey Aluminium Penrhos Industrial Estate Cibyn Industrial Estate Parc Bryn Cegin
0-10	Llanbedr Trawsfynydd NE of Former Goods Yard Former Shell Site (Rhosgoch)

5 The Strategy

Building on the sectoral trends and forecasts identified in section 3 this section of the report presents the strategy for strategic employment land across North Wales.

The strategy aims to support the sustainable growth and development of the nine priority sectors, recognising that all sectors are important for the region as a whole (i.e. North Wales), while also identifying where certain sectors may have more of a geographic focus within the region (e.g. Advanced Materials and Manufacturing within the North East of the region). This recognises the differing priorities of strategic investments, often aligning to priority plans and programmes and/or locating around existing business clusters in order to benefit from supply chain opportunities. Where such geographic foci are identified it is key that moving forward the North Wales Planning Authorities seek to work together to ensure that strategic investment benefits not just the local area but the wider North Wales region.

This section firstly presents the strategy timescales and defines the spatial strategy area. Subsequently a strategy for the nine key sectors has been developed, drawing on the growth forecasts and likely demand emerging through key priorities and programme. This **'Sector Strategy'** considers all nine sectors, recognising that while certain sectors have little demand for strategic employment land, they still perform an important role in the wider economy, creating a basis on which other sectors can build (e.g. tourism and creative industries) or providing an important supporting function to growth in other sectors (e.g. construction).

In the context of this sector strategy, the section also presents the strategic employment land strategy for the region, identifying strategic employment sites across North Wales which are considered suitable for meeting strategic employment demands over the strategy period to 2033. This **'Site Strategy'** prioritises sites in order that the North Wales Planning Authorities can focus strategic investment into delivering certain sites earlier in the strategy period.

Alongside the Sector and Site Strategy, consideration is given to the policy implications of this regional approach to strategic employment land, recognising that policies need to be sufficiently flexible to allow the region to accommodate investment that may have site or investment requirements that don't fully align with the strategy.

5.1 Strategy Timescales

The strategy is based on a 20 year timescale up to 2033. In considering site requirements and deliverability across this timescale, the site strategy is based on following broad timescales:

- Short Term – 0-5 years
- Medium Term – 5-10 years
- Long Term – 10+ years

Each site within the strategy (see section 5.4) is considered based on fit to these timescales, reflecting site deliverability and appeal to priority sector businesses. It is important to recognise however that market conditions and/or strategic investment decisions could alter the actual timescales under which a site or action

is delivered. These timescales will be particularly important when considering the need for infrastructure or other investment prior to occupation of a given site. For example, access upgrades may be required in the short term in order to facilitate development of the site in the medium term.

5.2 Defining the Spatial Strategy

As described above, the strategy presented below provides an approach to the development and promotion of strategic employment land across the North Wales region. The strategy focusses on encouraging investment in the most sustainable locations.

The Sector Strategy assumes all nine sectors are important for the region, although identifying geographic sector strengths with which the North Wales Planning Authorities should work together to ensure greatest benefit for the region (e.g. supply chain and employment opportunities).

In developing the Site Strategy we have considered a number of factors which will influence future interventions and the likely demand for strategic sites across the region. This analysis has helped identify key employment locations and areas which perhaps require a greater supply of strategic employment land moving forward. The factors considered include:

- **Travel to Work Areas (TTWAs)** – showing catchment areas for labour markets and likely travel to work distance which is a consideration in locating investment and/or seeking to develop strategies to increase employment catchments (e.g. worker bus services);
- **Housing Market Areas** – identifying areas of likely population growth;
- **Administrative Areas** – recognising current authority boundaries and also exploring cross border linkages, particularly to West Cheshire and Mid Wales;
- **Transport Networks** – a key consideration when looking at sectors requiring good communication links and access to strategic transport networks;
- **The flow of goods, services and information within the local economy** – to identify existing linkages and sector strengths;
- **Location of existing employment hubs and clusters** – particularly important when considering sector growth which has a propensity to cluster;
- **Key settlements and regeneration areas** – identified as locations of likely future growth and potential employment demand;
- **Policy drivers** – at both the national and local levels in order to ensure the strategy fits within the existing policy framework; and
- **Priority sector programmes and strategies** – in order to consider potential areas of the region which may require employment land due to programmes in place.

This appraisal has allowed us to consider the distribution of strategic employment sites across North Wales alongside the demand forecasts, identifying where the factors above may drive higher sectoral growth and therefore higher demand for strategic employment land.

5.3 Sector Strategy

This section of the report presents the strategy for the nine priority sectors. In considering how the North Wales Planning Authorities should support each of these sectors over the strategy period, attention has been given to the role of the sector and any current geographic foci.

Each of these sectors is discussed in further detail below with conclusions drawn in relation to actions required across the seven authority areas in order to grow and sustain investment in these sectors.

It is important to recognise that where the strategy identified a current geographic focus this does not preclude investment in these sectors elsewhere in the region, however, it provides a focus for growth, particularly where these sectors have a propensity to cluster and/or growth may be related to supply chain opportunities in certain areas of North Wales. In such instances, the strategy has explored how the wider region could benefit from this targeted investment.

5.3.1 Tourism

Tourism is a vitally important sector to the North Wales economy and yet the sector has little need for strategic employment sites as defined within this strategy.

The sector is estimated to account for 7.5% of GVA and 8.7% of employment in North Wales and it is estimated that visitors inject approximately £1.8bn of additional spending into the North Wales visitor economy¹⁷.

The quality of the natural environment is the key to the region's tourism economy. The region benefits from a rich history with numerous castles and fortified towns and a range of industrial heritage sites. Outdoor activities also attract visitors to the region, as well as the language, culture, food and drink.

There are a number of strategic projects and/or extant permissions within the region which are likely to play a key role in the future of the sector, including:

- **Land & Lakes** – Proposals to create a world class tourism destination that utilises and protects the environment whilst providing an economic legacy for the future. The proposed development includes a leisure village, nature reserve, visitor centre, leisure lodges, hotel and conference facility as well as an element of high quality residential development. The development received outline planning consent in November 2013.
- **Surf Snowdonia** – Proposals for an outdoor surf park in the Conwy Valley on the site of the former Dolgarrog aluminium factory.

Both these schemes show the value of the tourism sector in bringing wider economic benefits but also finding innovative ways to utilise areas of former strategic employment.

SS1 – Tourism

The strategy encourages the future growth of tourism, supporting the priorities identified in both the Tourism Strategy for North Wales and strategies developed at the local authority level.

¹⁷ Tourism Strategy for North Wales, 2010-2015

While the strategy does not identify any strategic land with a tourism focus, the importance of investment in the sector should be encouraged through a flexible policy approach which directs investment to the most sustainable sites and allows for the continued development of existing facilities and attractions.

Specifically, the North Wales Planning Authorities should work together to bring growth in volume, value and local benefit from the tourism sector.

Justification – to increase the value of the tourism sector across the region as well as ensuring that the sector continues to offer a high quality lifestyle to both visitors and residents of the region, adding to the locational offer of the region to key investors.

5.3.2 Construction

The Welsh construction industry is expected to see output rise towards 2018¹⁸, a forecast which is significantly dependant on the start of construction works at Wylfa and one which offers potential major benefits for the North Wales economy.

Alongside this projection the sector is continuing to see increased orders as the recovery continues in what has been a volatile sector in Wales and the rest of the UK over recent years.

While the sector itself has limited requirement for strategic employment sites, it is considered to perform a key support function in the economy, enabling and supporting growth in all of the other priority sectors.

SS2 – Construction

The North Wales Planning Authorities should work together and in partnership with the construction industry in order to ensure that the region benefits from the projected upturn in employment in the sector.

Specifically, opportunities arising through contracts on projects such as Wylfa should be explored with Horizon and relevant links made with local colleges in order to ensure construction benefits are maximised at the local and regional levels.

The North Wales Planning Authorities should work to ensure that skills development increases in-line with growth in the sector in order to ensure that the support function in growing other key sectors can be fulfilled with benefits retained in North Wales. This can be facilitated through the North Wales Construction Shared Apprenticeship Scheme.

Justification – while a key employer in its own right, the construction sector is also critical to support growth in other key sectors across the region. It is also important that the region seeks to benefit from planned strategic projects such as Wylfa Newydd, the wider energy sector and projects such as Wrexham's super prison.

5.3.3 Financial and Professional Services

The Welsh Government has outlined plans to provide investment in this important sector with plans to grow employment from 124,000 in 2010 to 200,000 by 2021. The sector encompasses legal, accountancy and corporate service firms and Wales

¹⁸ Construction Skills Network – Wales 2014-2018

has benefited previously from investment in the retail banking and general insurance sub-sectors.

Analysis of the sector has shown existing clusters of professional services activity at a number of key locations across North Wales including Wrexham, Deeside and Flint, St Asaph, Ruthin, Colwyn Bay, Bangor, Caernarfon and Llangefni. This balanced spread of hotspots east to west across North Wales highlights the role that financial and professional services play as supporting services in local economies across the region.

Cross border linkages are also important for employment within this sector in North Wales. Chester is a major centre for financial services, with more than 10,000 jobs and given the proximity to North East Wales is a major focus for North Wales residents employed within the sector currently.

SS3 – Financial and Professional Services

The North Wales Planning Authorities should work closely with the national Sector Panel in order to ensure North Wales is recognised as an investment location for future growth in this sector. The region already contains some key employers such as Moneysupermarket.com and the access to and availability of a suitable workforce should be promoted as a key locational benefit for future investment.

Justification – in order to retain existing investment in this sector and support growth from existing and new investment.

5.3.4 Life Sciences

The life sciences sector in Wales employs over 10,000 people across a diverse range of sub-sectors including pharmaceutical, biotechnology and medical technology businesses. Activities within the sector include research, testing and manufacture.

The sector has a general propensity to cluster and a changing nature with new sub-sectors emerging and developing continually. The diverse and shifting nature of the sector means it supports employment in both micro and small scale businesses as well as more established, medium scale firms. Flexible, high quality business space is key to meeting future growth requirements in the region.

The North Wales economy already contains some of Wales' most established employers in this sector including Siemens Healthcare Diagnostics in Gwynedd and Convatec Ltd in Deeside.

SS4 – Life Sciences

The North Wales Planning Authorities should work to support existing employers in this sector, working closely with them to understand their development requirements and understanding potential supply chain opportunities that may arise.

The Authorities should also work to ensure that employment land is sufficiently flexible to allow for future growth within this sector, with the ability to accommodate micro and small scale emerging sub-sectors as well as retaining and attracting the larger scale employers within the sector.

Justification – in order to be positioned to respond to the employment land needs of sector investors and retain existing investment, working with current employers to understand future needs and requirements and seeking opportunities to bring

supply chain benefits to the region.

5.3.5 Energy and Environment

The energy and environment sector is recognised as being vitally important to the North Wales economy over the strategy period, as well as having an important enabling role across the wider economy.

The sector is diverse and includes energy generation and use, renewable energy, emerging low carbon energy and technologies and environmental goods and services. The sector and its sub-sectors provides:

- opportunities for creating jobs for a sustainable economy
- opportunities for delivering resource efficiency; and
- opportunities for driving forward the low carbon, low waste agenda.

The strategy recognises the planned strategic investment in this sector over the next 10-15 years, particularly with projects such as Wylfa Newydd and the development and deployment of renewable energy technologies within the region. The sector is further supported through the ‘Energy Island Programme’ which brings together various stakeholders from the public and private sectors with an aim of putting the region at the forefront of energy research and development, production and servicing.

In recognising the regions natural resources, the existing knowledge base and firms and current academic strengths, North Wales is well placed to play a key role in the development of this sector.

Alongside the direct employment and investment benefits of projects such as Wylfa Newydd it is considered that the sector also offers a number of potential supply chain opportunities for the region. These are concisely set out below.

Wylfa Newydd – Nuclear New Build

The construction and commissioning of the new nuclear plant offers the greatest supply chain opportunities. Evidence from outside of the UK and estimates from our experience working on Hinkley Point C suggest that direct job impacts for a new build during construction could peak at between 3,500 and 5,000 jobs based on the construction of three reactors with a construction period of nine to ten years.

Operationally, there are four tiers to the supply chain, including:

- Site management and licensing (Tier 1);
- Tier 2 and 3 contracts which will provide employment opportunities to local people but are unlikely to be led by local businesses; and
- Tier 4 companies which supply ancillary services. Local business have the greatest opportunity to win these contracts which may include general building services, steelwork and fixings, electrical supplies, catering, bed and breakfast and car rental.

The proposed development is likely to create both a supply chain demand and investment in sites for associated developments during construction which have

the potential to leave legacy benefits in terms of becoming future strategic employment sites.

Anglesey County Council has recently published Supplementary Planning Guidance for New Nuclear Build at Wylfa which contains a vision which sees the new build as “*a positive driver for the transformation of the economy and communities on Anglesey, providing sustainable employment opportunities, improving quality of life for existing and future generations and enhancing local identity and distinctiveness*”.

The document contains a number of objectives many of which are relevant to the strategy, including:

- Ensure Wylfa NNB maximises opportunities for the employment and up-skilling of local people; and
- Ensure the project delivers significant and enduring infrastructure benefits.

The SPG considers that the project could help stimulate investment within the energy sector and knowledge based industries, and maximise research and development activities.

Offshore Wind

There continues to be significant investment in offshore wind energy off the coast of North Wales and this offers a number of supply chain opportunities.

Installation of the turbines offers some potential with the main opportunities around ports suitable for construction, the supply of vessels for turbine and foundation installation, and the civil engineering and construction skills base. The port of Mostyn has established itself as the focus for the construction and transport of turbine and foundation parts.

The sector also offers opportunities during operation through maintenance contracts. There is already related activity in Holyhead with a local boat building company supplying vessels for offshore platform maintenance.

Wave & Tidal Power

The proposed Skerries tidal stream array project is located less than 1km from the Anglesey coast and will consist of up to 9 ‘SeaGen’ devices with a total capacity of up to 10 MW.

The project will require engineers, boat handlers and divers for the installation, operation and on-going maintenance. The project is also likely to require environmental scientists for on-going environmental monitoring. This offers opportunities in relation to assembly and operation and maintenance alongside more specialist opportunities related to the environmental monitoring, potentially developing further links with Bangor University.

Biomass

The former Anglesey Aluminium site on Anglesey has planning consent for a large scale biomass plant and Lateral Power plan to build the Welsh Eco Parc. The project comprises a cluster of businesses, with energy as the common link. Conservatively Lateral Power estimate more than 400 permanent jobs will be created on the site. A large element of the scheme involves a 299MW biomass

plant which will generate electricity and produce water and heat which will be diverted for use by the surrounding businesses.

Should the project proceed it would offer local supply chain opportunities during both construction and operation. Most biomass plant and equipment is currently imported and the biomass itself may also be imported. The Port of Holyhead may therefore benefit from this investment and the wider area could become an important location for importing biomass for Anglesey and other areas of the UK.

Irish Connection

There are a number of opportunities for the region surrounding grid connection projects between the UK and Ireland. Such projects seek to improve the energy mix in the UK and contribute to the overall UK demand for energy through exporting power generated in Ireland.

The projects are looking at a number of sites in North Wales and could generate direct employment opportunities as well as supply chain benefits for the region.

SS5 – Energy and Environment

The importance of this sector to the future of the North Wales economy is clear with a number of strategic investments and partnerships already in place, and emerging, which will bring substantial benefit over the strategy period.

However, the sector and its associated supply chain are not considered to create a large scale demand for strategic employment land.

It is considered that the site strategy presented in section 5.4 identifies sufficient land for future investment in this sector and the North Wales Planning Authorities should work to ensure the employment and economic benefits emerging from investment in the sector are maximised and where demand for employment land emerges, investment is directed to the most sustainable sites.

Justification – to ensure that North Wales benefits from strategic investment in the sector and works closely with potential investors in order to fully understand their employment land needs.

5.3.6 Advanced Materials & Manufacturing

In today's economy, the advanced engineering industries are the drivers of global innovation, developing new materials and devising more efficient production processes. The North Wales economy benefits from housing a share of the UK's capabilities in aerospace, the automotive sector, advanced materials and manufacturing, contributing to the success of this sector within the wider UK and bringing strength to the region through the way in which the prime manufacturers such as Airbus and Toyota work with many smaller, specialist companies as part of their integrated supply chain.

This sector has a current geographic focus in the North East of the region, an area which contains a number of anchor companies¹⁹ within the sector, identified by the Welsh Government as a global international organisation, a company with Welsh headquarters or a significant corporate presence in Wales. Key existing locations for the sector include:

¹⁹ Welsh Government Anchor Companies - <http://wales.gov.uk/topics/businessandconomy/sector/anchor/?lang=en>

- Wrexham Industrial Estate;
- Llay Industrial Estate;
- Deeside;
- Broughton Aerospace Complex; and
- St Asaph.

This base of companies operating within the advanced materials and manufacturing sector has been built around these anchor firms which includes Toyota and Airbus. The North East benefits from strong national linkages with Cheshire and the wider North West and West Midlands regions of England, while also offering strong regional linkages due to the presence of the A55, A494 and A5.

While of key importance to this area of North Wales, the sector remains important to the whole region with many of the major employers within the sector attracting employees from right across North Wales. The sector also offers supply chain opportunities for North Wales.

SS6 – Advanced Materials and Manufacturing

The strategy seeks to focus growth and investment in this sector within the North East of the region with an emphasis on the automotive, aerospace and opto-electronics sub-sectors.

The region should work together to support the existing key employers within the sector, attract new investment and develop supply chain opportunities. Collaborative working should also focus on ensuring the benefits of large scale investors in the sector are capitalised across the region with innovative approaches to employment models and travel to employment explored between local authorities.

Future investment within the sector should be directed to the strategic sites identified with a Materials and Manufacturing sector foci. Within the North East of the region this includes the Deeside Enterprise Zone, St Asaph and Bodelwydden and the aerospace hub around Broughton. Within the wider region, sites such as the Llangefni Cluster also offer potential for the sector.

In light of sector forecasts, the North Wales Planning Authorities should work together to retain high value manufacturing jobs locally in an attempt to bring most benefit from the sector should overall employment decline in the long term.

Justification – In order to ensure continued success of this sector across the region, focus any new investment in strategic, sustainable locations and work as a region to ensure that supply chain and employment opportunities are capitalised.

Work with key investors in order to retain high value jobs within the sector.

5.3.7 Food and Farming

As identified in ‘Food for Wales, Food From Wales 2010:2020 – Food Strategy for Wales’ this sector is fundamentally intrinsic to the economy of Wales. This not only relates to the creation of jobs but is also seen as critical to food security and the wellbeing of the nation.

Farming has always been a prominent sector within many areas of North Wales and the supply chain within the sector in terms of food production, manufacturing and distribution is also a key aspect of the economy.

Sectoral analysis has shown a number of concentrations in employment within the sector, including the areas of Wrexham, Deeside, the Vale of Clwyd, Pwllheli and Llangefni. These concentrations reflect the larger scale employment within the sector and relate to a diverse range of processes, logistics and distribution.

SS7 – Food and Farming

The strategy for this sector is two-fold, recognising the importance of the agricultural sector for the whole of the region while seeking to grow the supply chain opportunities around food and drink, as well as supporting entrepreneurial activity in order to strengthen and add value to the food and farming sector in Wales.

With the structure of farming set to change over the early part of the strategy it is important that support is given to the sector in order that agricultural output remains an important contribution to the Welsh economy.

The strategy should support the micro and small scale businesses emerging in this sector through ensuring flexible, high quality business space. The niche businesses within the sector help promote Wales identity and culture and strengthen the prominence of the food sector.

Alongside this niche element of the sector, the North Wales Authorities also need to encourage growth within the more strategic elements of the sector, promoting the region as a key location for food and farming process, logistics and distribution. This focusses on locations with access to the strategic road network and other strategic distribution channels (e.g. the Port of Holyhead).

Justification – to support indigenous growth and the development of small to medium sized businesses while also promoting the region as a location for food process and distribution, building on some of the existing key employers and seeking to attract new investors with specific distribution demands.

5.3.8 Creative Industries

The creative industries sector in Wales supports approximately 30,000 people in over 4,200 enterprises, illustrating the often micro, small and medium sized nature of businesses within the sector.

The sector is one which is diverse containing sub-sectors including advertising, architecture, crafts, design and fashion, digital, electrical and media industries, film, video and photography businesses, publishing, TV and radio, music, visual and performing arts.

Much of the large scale growth within the sector in Wales has focussed on South Wales, particularly around the cluster created by the BBC in Cardiff Bay. In North Wales, there are some concentrations within the sector focussed in and around the main settlements, including Wrexham, Deeside, St Asaph, Ruthin, Colwyn Bay, Bala, Dolgellau, Porthmadog, Pwllheli, Caernarfon, Bangor, Conwy and Llandudno.

While employment within the sector is spread evenly across the region, the focus is very much on the main towns, around academic institutions and areas with good ICT connectivity. There is evidence of increased home working in this sector driven in part by the need for low operating costs and the growth of lifestyle businesses. As businesses grow in this sector they tend to look for flexible space on flexible terms. The architectural uniqueness of the space is also often of importance to reinforce the creativity of the space. (e.g. historic building conversions within town centres).

SS8 – Creative Industries

The strategy seeks to support further growth in this sector across the region, with a specific focus around existing clusters and areas such as Caernarfon which have built a base of businesses within the sector.

Demand for strategic employment land from the sector is considered to be minimal, however, support for the small to medium scale businesses is key to attracting the larger employers such as the major TV production companies and therefore land should be available for flexible space on short term lease arrangements.

Justification – to generate employment space in strategic locations that supports and facilitates the growth of this sector which forms an important part of the wider regional economy and creates a business base which is often attractive to larger scale investors in other key sectors.

5.3.9 ICT

The Information Communications Technology (ICT) sector is one which has seen growth in Wales over recent years and is a sector which is recognised as being able to support the wider economy, enabling increased trade and globalisation, creating a ‘flatter’ world and improved competitiveness of Welsh Businesses.

The sector is diverse and contains IT services, software, telecommunications and electronics based sub-sectors.

While North Wales may see some growth within the sector over the strategy period, it is unlikely that the growth will lead to any huge demand for strategic employment sites. Currently employment within the sector is focussed around Wrexham, Deeside, St Asaph, Conwy and Bangor.

SS9 – ICT

Given the nature of the ICT sector the strategy seeks to enable future growth within the micro and small scale sections of the sector, promoting clustering wherever possible in order to create a sub-regional or regional base for the ICT sector.

The North Wales Planning Authorities should enable the creation of flexible, high quality business space for this sector where demand exists across the region.

Justification – in order to facilitate small to medium scale growth within the sector and create an attractive business base to support future larger scale investment. Also look to bring benefit to the region on the back of the fibre optic broadband rollout, a key locational requirement of the sector.

5.4 Site Strategy

The **Site Strategy** for the region is presented in Tables 17-19 overleaf. This strategy presents sites or site clusters in priority order in line with the definitions set out below:

Short Term	Site considered deliverable within five years. An existing site or undeveloped site but with limited investment required to bring site to market.
Medium Term	Site considered deliverable within 10 years. Sites likely to require some investment prior to being brought to market and/or is likely to be

	developed as part of a priority or programme (e.g. Wylfa Newydd).
Long Term	Site considered a long term opportunity, unlikely to come to market within the first 10 years of the strategy. These may be sites that offer expansion potential to sites within the short to medium term categories or those sites that require significant investment.
Committed	Sites with an extant planning permission and/or identified by a specific end user, this category seeks to identify where sites may be deliverable short term but have an identified use or investor and will therefore largely be driven by those investors and end users.
Reserve	Sites identified as having the potential to contribute to the regions strategic employment land but without a current sector foci or in close proximity to other sites considered to be more deliverable within the strategy timescales. These sites are therefore reserved in the strategy in order to meet future strategic site needs.

In developing the strategy, consideration has been given to site constraints and therefore potential deliverability, as well as the identified demand within the key sectors.

A number of sites have been identified on the basis of certain priorities or programmes (e.g. potential associated development sites for Wylfa Newydd), however, as more detail on these programmes emerges, the strategy should be reviewed in order to reflect any decisions made.

Table 17 Site Strategy

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
Wrexham Technology Park & Ruthin Road	This area is currently covered by the Western Gateway Development Brief. Uses are currently limited to B1 and therefore focusses on high quality office based development.	Second phase of technology park subject to infrastructure. Prestige location for high quality employment accommodation to support a range of professional services and life sciences. The vision for the site identifies financial services and the technology and innovation sectors to be of particular interest.	Highway infrastructure works required to facilitate development.	Regional Strategic Site (Primary)	Short Term Some sites available on the Technology Park.
Bodelwydden and St Asaph Business Park	St Asaph Business Park forms a successful, strategically located employment site with a range of uses. The site contains the Optic Centre which gives a focus around the advanced materials and manufacturing sector.	Site offers strategic inward investment potential for a range of sectors. The Bodelwydden site offers a next stage to the St Asaph Business Park. Potential contribution from housing elements of Bodelwydden for infrastructure improvements.	Transport/Infrastructure - Further work needed in relation to how the two sites connect moving forward.	Regional Strategic Site (Inward Investment)	Short Term Bodelwydden site partly dependant on the development of other uses.
Hawarden and Chester Aerospace Park (EZ)	Part of this site has an existing Masterplan while the remainder provides a potential expansion area. The site is promoted for supply chain opportunities in the aerospace sector.	This site offers a clear role in relation to investment from the advanced materials and manufacturing sector, with a specific focus on the aerospace sub-sector due to its location adjacent to the airfield and businesses such as Airbus.	Masterplanned site requires limited infrastructure. Any extension would need masterplanning and infrastructure improvements.	Regional Strategic Site (Primary)	Short Term
Llangefni (Lledwigan Farm, Creamery Land and Bryn Cefni)	Bryn Cefni is an existing employment site containing a mix of local and regional businesses. The Creamery Land and Lledwigan Farm site allocations are both greenfield sites.	The Bryn Cefni site will continue to be the primary location for investment in this part of the region for the more traditional industries. The surrounding allocations present opportunities for a two stage extension, creating a regionally strategic employment opportunity.	No Infrastructure present on Lledwigan Farm or Creamery Land. Bryn Cefni is well serviced and should be prioritised.	Regional Strategic Site (Primary)	Short Term Bryn Cefni focus with expansion potential longer term.

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
Mochdre Commerce Park	Strategic site within the Conwy LDP with a focus on B1, B2 and B8 uses. Site has seen recent development with 5.5 Ha constructed since 2007 including industrial warehousing and office accommodation.	Extension of the existing investment offering a strategically located business park for development across the B use classes.	Limited – internal infrastructure established.	Sub-Regional Strategic Site (Secondary)	Short Term
Parc Menai	This site is an existing high quality business park with available development plots. The site has a focus on high quality offices and business accommodation as well as a fully equipped business incubation wing. The site also home to Coleg Menai's Art and Design department.	The site offers potential for further development of high quality office accommodation and business units with a potential focus on sectors requiring the high quality environment and business incubation facilities.	Limited – site serviced and connected by fibrespeed broadband.	Sub-Regional Strategic Site (Secondary)	Short Term
Penrhos Industrial Estate	The current site at Penrhos contains a mix of retail outlets and smaller scale business units.	Extension to the existing Penrhos Business Park with strategic links to the Port of Holyhead.	Limited – site located close to Junction 2 of the A55 and vacant development plots serviced by road infrastructure.	Sub-Regional Strategic Site (Secondary)	Short Term
Cibyn Industrial Estate	Established industrial estate on the outskirts of Caernarfon supporting local and regional employment uses.	Support indigenous growth and retain existing businesses. No obvious priority sector clustering. Potential to accommodate some small to medium size investment.	Limited due to plots within existing employment site.	Sub-Regional Strategic Site (Primary)	Short Term
Park Bryn Cegin	Strategic development site which has been developed by UK Land and Property in partnership with the Welsh Government. Infrastructure works have been completed to provide fully serviced	The site offers a strategically located employment site off Junction 11 of the A55 with infrastructure works complete. The strategy considers the site could attract a large scale inward investor.	Limited – site well located within proximity to the A55 and road network and infrastructure in place.	Regional Strategic Site Inward Investment	Medium Term

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
	development plots.				
Gaerwen Industrial Estate	Existing employment site containing a mix of local and regional occupiers with good access onto the A55 at Junction 7.	A site adjacent to the allocation has been identified as the preferred location of the future science park. Knowledge led growth should be the focus should the science park progress.	Site easily accessible from the A55, however issues exist around internal access which would require improvements.	Regional Strategic Site (Primary)	Medium Term
Llanbedr	This former airfield site has a recent Masterplan which explores the potential for a variety of uses with a focus on the aerospace sub-sector.	The site should be promoted and progressed in-line with the Masterplan to enable growth in aircraft maintenance, repair and overhaul and Drones. Any business units developed on the site should have a focus on this sub-sector.	Investment in access and utilities infrastructure including foul drainage and electricity supply. Flood alleviation works required Security investment maybe required depending on end use.	Regional Strategic Site (Secondary)	Medium Term Likely to be reliant on Welsh Government investment.
Deeside Industrial Park (EZ)	This site forms part of the Deeside industrial area and attracts a wide range of manufacturing and distribution companies. The site offers a range of units and has undergone a programme of improvement.	Moving forward we consider that the site will continue to form a key site to accommodate a variety of businesses from a range of sectors.	Significant – site requires investment in broadband, utilities and access. This links particularly to improvements that will provide alternatives to using the car. The site is also experiencing a shortage of quality premises.	Regional Strategic Site (Secondary)	Medium Term
Llay Industrial Estate	The Llay industrial estate is an established employment location containing a mix of local and regional employers.	Support indigenous growth and retain existing businesses. No obvious priority sector clustering. Potential to accommodate some small to medium size investment.	Limited infrastructure needs in order to attract and secure future investment.	Sub Regional Strategic Site (Primary)	Medium Term
Mostyn Docks	Mostyn docks forms part of the Port Development zone within the Flintshire UDP. The site has a current role in the development and deployment of off-shore components for the renewable energy sector as well	Expansion area for land based activities and uses. Can't be too prescriptive without specific propositions to consider.	Site infrastructure required. Future uses limited to ground based to utilise the existing port facilities.	Regional Logistics and Distribution Hub	Medium Term

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
	as a distribution role for aircraft wind produced at Airbus in Broughton.				
Abergele South East	Strategic mixed use allocation offering potential employment related development and a site for further expansion.	Strategically located site with excellent links to the A55. Given the site is part of a wider mixed use scheme it is considered appropriate for B1 and B8 uses along with lighter industrial uses.	Site is currently greenfield. Infrastructure and utilities investment required.	Sub-Regional Strategic Site (Primary)	Medium Term
Wrexham Industrial Estate	The Wrexham industrial estate is a large scale estate supporting a variety of businesses of all sizes and across all sectors. It was recently announced by the Ministry of Justice that plans for a new super prison on the site had been approved.	Support indigenous growth and retain existing businesses. No obvious priority sector clustering. Potential to accommodate some small to medium size investment. Monitor investment needs and changing conditions on the site given recent announcements around the super prison development.	Potential for redevelopment and rationalisation. New link road required Improvements to public transport Infrastructure needs related to strategic growth.	Regional Strategic Site (Secondary)	Medium to Long Term Sites available in the short term to accommodate small to medium size investment.
North and East of Shotton Paper (EZ)	These sites are currently brown field sites in the areas surrounding Shotton Paper works and Tata steels Shotton site.	As part of the Enterprise Zone, this site will either provide expansion space for Shotton paper mill and/or associated investment with a focus on the themes of sustainable energy use and generation to facilitate future investment.	Significant – requires an upgraded internal circulation and investment in utilities infrastructure.	Regional Strategic Site (Primary)	Medium to Long Term

Table 18 Committed and Consented Sites

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
North West of Garden City (EZ) 'Northern Gateway'	Allocated mixed use site which has current proposals for a large scale mixed use scheme. Outline consent has been achieved on part of the site and necessary flood defence works are being undertaken by Welsh Government.	The sites location offers potential to attract investment from a broad range of sectors. There is also potential for an advanced manufacturing skills and technology centre on the site which may bring linked investment.	Required infrastructure will be delivered as part of any future development. Flood protection measures are currently being developed by Welsh Government to facilitate development.	Regional Strategic Site (Primary)	Short Term
Parc Cybi	Located on the southern edge of Holyhead, adjacent to the A55 this site has consent for a first phase office development along with logistics/industrial units.	The future role of the site could take many forms. The existing consent could see the development of high quality offices as well as strategically located logistics, truck parking and industrial units, linking to and supporting the role of Holyhead Port in the region. There is also potential for the site to support the development of Wylfa Newydd from a logistics perspective.	Limited – site serviced by new infrastructure (roads, foul and surface water and utilities)	Regional Strategic Site (Primary)	Short Term
Holyhead Port	This site currently operates as a passenger and commercial port. Consent was recently granted for the Holyhead Waterfront scheme which will see development of a 500 berth marina, 252 apartments, 74 houses and an 80 bedroom hotel alongside some employment land.	The site has a clear role for continued passenger and commercial distribution. The recent planning consent offers opportunities to develop some employment premises focussed on businesses that utilise the port or would benefit from the strategic connections to Ireland.	Limited, site part of the existing operational port.	Regional Logistics and Distribution Hub	Short Term
Anglesey Aluminium	Former site of Anglesey aluminium.	Lateral Power has secured consent for a 299MW biomass plant on the site along with a wider energy park project.	Limited. Site has extant consent for energy park and former use required infrastructure and energy networks.	Regional Strategic Site (Primary)	Medium Term
Former Shell Site (Rhosgoch)	Former shell oil depot / tank farm.	Committed Site – it is understood that this site has been identified by Centrica Energy as their preferred	Limited – previous site access infrastructure still in place.	Committed	Unknown

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
		location for onshore substation associated with the proposed Rhiannon Offshore windfarm.			

Table 19 Reserve Sites

Site Name	Current Role	Future Role	Infrastructure Needs	Site Role / Potential	Priority
Warren Hall	This site is currently greenfield land within proximity of Broughton and the Hawarden Airport. The site has benefited previously from infrastructure investment by the Welsh Government.	The site offers potential for future employment with previous infrastructure investment in the site from Welsh Government. The site should be promoted as space on other sites reduces and/or an investor comes forward.	The site is currently greenfield land. Likely to require further internal infrastructure and utility infrastructure.	Reserve Site	Long Term
Tir Llwyd	Site contains a range of units which can accommodate small trade counter style businesses to larger organisations. The site has a number of potential expansion areas.	Future role for the site in terms of strategic investment unclear. The site could attract a large scale inward investor, although the decision would need to be locationally specific.	Limited need to infrastructure investment.	Reserve Site	Medium to Long Term Investor dependant.
Trawsfynydd	This former nuclear power station site is currently undergoing decommissioning. The site offers a large area of land which could be used for employment type uses. Feasibility work has been carried out on the site.	The future role for this site remains unclear. There is potential for development related to the nuclear sector and/or specific development that requires the characteristics that the site offers.	Connectivity investment including public transport	Reserve Site	Medium to Long Term Dependant on infrastructure investment and right operator being found.
North East of Former Goods Yard	Site currently allocated for B1 uses, benefiting from proximity to a safeguarded railhead.	Limited evidence of freight demand related commercial investment for this location. Potential development opportunity as part of a wider Masterplan.	Site requires infrastructure and utilities investment. Works to allow benefit from the railhead should an investor be found.	Reserve Site	Long Term Reliant on investor being found.

5.5 Site and Sector Recommendations

The sites included in Tables 17-19 above are illustrated on the Strategy Plan overleaf (Figure 4). This shows the geographic spread of sites that form the basis of the strategy for the region.

The narrative below accompanies this plan and describes the site and sector strategy over the short, medium and long term. Although some long term recommendations have been suggested, these are likely to change as the strategy progresses and is monitored, reviewed and up dated.

Short Term

The short term strategy for North Wales is one which focusses on the following key actions:

- Delivery of the committed and/or consented sites;
- Infrastructure works and further work required to bring priority sites to market; and
- Marketing and promotion of those sites identified as quick wins in terms of their readiness for development.

Alongside this, the North Wales Planning Authorities should work to undertake some soft market testing in order to better understand the key sector needs across the region. This should focus on the following key sectors and sub-sectors:

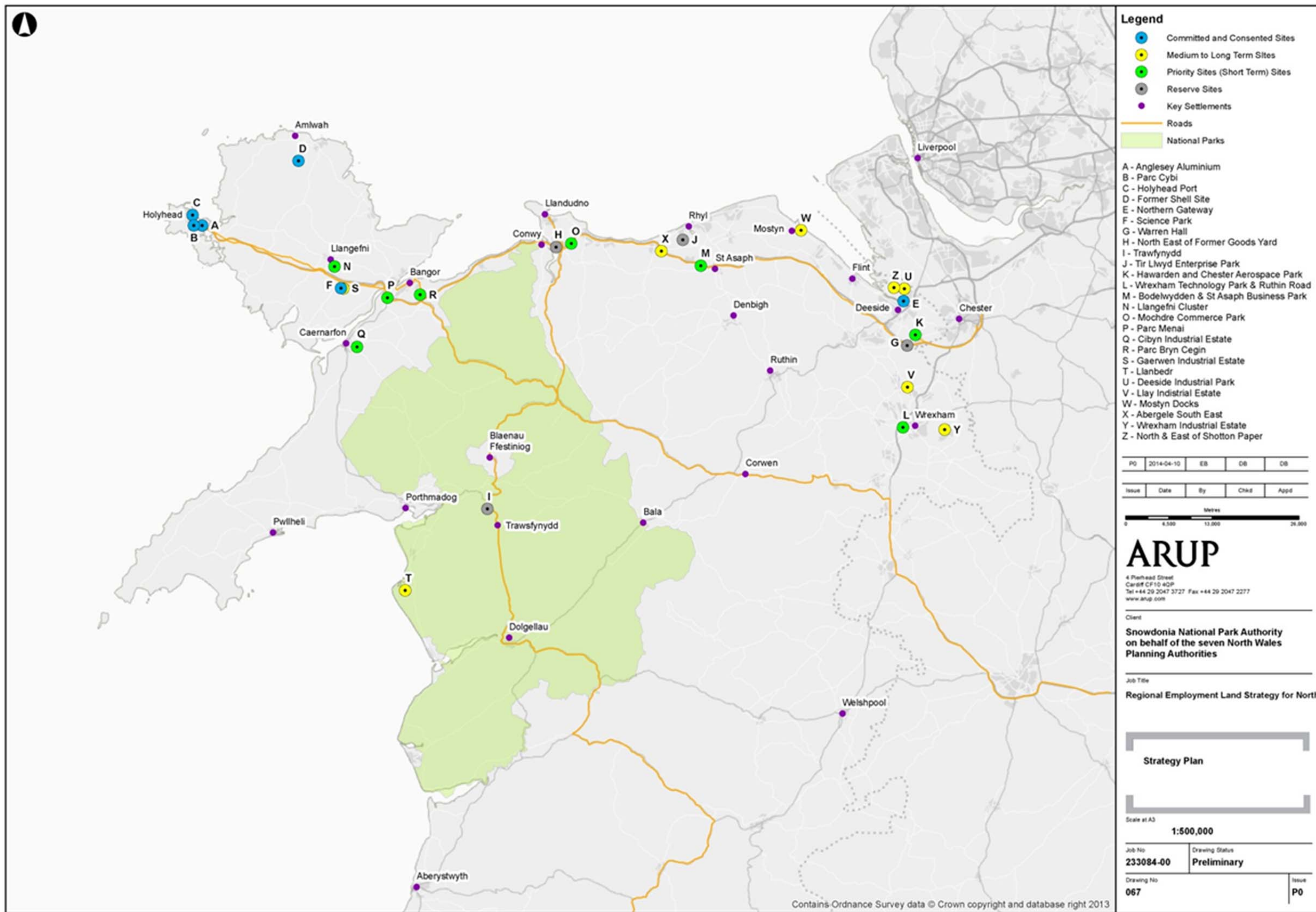
- Advanced Materials and Manufacturing (Aerospace, automotive and opto-electronics);
- Energy and Environment (focussing on understanding the potential land requirements of the strategic investors active in North Wales);
- Life Sciences (seeking to build on existing investment and clusters).

Any investment potential in the short term, unless site specific in its inquiry should be directed to those sites identified as being priority in the short term.

The following sites have been identified in the strategy as committed and/or consented and therefore the North Wales Planning Authorities should work to progress these in the short term:

Site Name	Area (ha)	Proposed End Use
Northern Gateway	98	Mixed use development with a range of housing and B use class employment proposed. Site to include Advanced Manufacturing Skills & Technology Centre.
Parc Cybi	53	Consented regional logistics/distribution site with a range of units and office accommodation. Site also includes a truck stop.
Holyhead Port	10	Mixed use development to include housing, some business floorspace and a new marina facility.
Science Park at Gaerwen	20	Proposed science park project led by Bangor University. Hoped that the site will attract hi-tech companies with a focus on energy.
Total	181	

Figure 4 Strategy Plan



Alongside these sites, the strategy identifies the following sites which either offer a readiness for investment or are considered as a priority for infrastructure investment:

Site Name	Area (ha)	Site Status	Notes
Wrexham Technology Park & Ruthin Road	20.5	Regional Strategic Site (Primary)	Some sites available on the Technology Park. Highway works required to open up future expansion land.
Bodelwydden & St Asaph Business Park	40	Regional Strategic Site (Inward Investment)	Sites available on St Asaph. Further work required in order to explore connectivity between the sites.
Hawarden & Chester Aerospace Park (EZ)	33.7	Regional Strategic Site (Primary)	Continued promotion of sites for investment with a particular emphasis on the aerospace sub-sector.
Llangefni Cluster	43	Regional Strategic Site (Primary)	Focus on delivery of available space at Bryn Cefni with option to expand should investment interest arise.
Cibyn Industrial Estate	7.3	Sub-Regional Strategic (Primary)	Potential to accommodate some small to medium size investment.
Mochdre Commerce Park	5	Sub-Regional Strategic (Secondary)	Extension to the existing offering.
Parc Menai	6.3	Sub-Regional Strategic (Secondary)	Focus for developing business within the key sectors.
Penrhos Industrial Estate	3.5	Sub-Regional Strategic (Secondary)	Extension to the existing employment site which could benefit from surrounding strategic developments.
Total	159.3		

This short term strategy will potentially deliver a significant amount of employment land across the region just through the completion of the committed/consented sites.

Despite this, the strategy identifies other priorities which should be progressed in the short term, including both sites that should be promoted and sites requiring investment.

It is considered likely that investment over the short term will be attracted to Enterprise Zone sites given the availability of enhanced Capital Allowances. Within recent budget announcements, these allowances were extended and will be available until 2020. This could therefore have a bearing on investment patterns into the medium term element of the strategy.

Medium Term

The medium term strategy for North Wales is one which focusses on the following:

- Review of inward investment inquiries and a re-run of forecasts;
- Infrastructure works on identified sites should further space be required across the region;
- Progress on regeneration and rationalisation of sites

The medium term within the strategy will also see sites requiring infrastructure investment within the short term coming forward to market.

The strategy for the medium term will depend heavily on the performance of the region in the short term. Sites that have been prioritised in the short term for infrastructure investment will be coming to market during the medium term and therefore no further sites may be required to meet demand.

However, this should be monitored throughout the first five years of the strategy and reviewed in light of revised forecasts (Recommendation R3 and R7). There are a number of sites which will require review at this stage including:

Deeside Industrial Park – undertake required infrastructure investment in order to bring site forward. This work should be undertaken if required following delivery of the Northern Gateway site with priority given to that commitment.

Llanbedr Airfield – The development of this site in-line with the Enterprise Zone allocation is heavily reliant on Welsh Government Investment. The decision by Welsh Government to invest may see this site developed in the short term. However, should investment not be forthcoming, the inclusion of the site in the strategy should be reviewed at this stage.

Wrexham Industrial Estate – This historic employment site may change over the coming years with the development of the prison and also need for major infrastructure investment. A process of rationalisation and review should be undertaken in order to plan the future of the site in line with wider trends.

Park Bryn Cegin – this site is a prime site for a large scale inward investor seeking land in the North West of the region. Given other sites within the Enterprise Zones it is considered unlikely that this will come forward in the short term. The future of the site should be reviewed at this stage of the strategy.

Mostyn Dock – As the nature of the Airbus business changes the future of this site is unclear. The site identified will only be developed should an end user be found to utilise the dockside location.

This stage of the strategy should also consider the need to expansion land or extensions to sites identified in the short term strategy. This includes for example, St Asaph and Bodelwydden and Llangefni.

Long Term

The long term strategy for the regions sites is difficult to predict given the current forecasts and uncertainty around strategic projects and programmes. The strategy should however consider the following actions:

- Further review of land take-up and rationalisation where necessary;
- Work closely with Horizon in order to understand and plan for any legacy benefit arising from Wylfa Newydd;
- Consider the need to bring forward reserve sites.

Wylfa Newydd is a key consideration within this part of the strategy. The development at Wylfa will utilise a number of sites for associated development work (currently unknown) and there is potential for legacy benefits from these sites.

Committed or Consented Sites

The strategy has identified a number of sites which have extant consents and/or agreements in principle for a given end use. These sites have been included within the strategy in line with approximate timescales for delivery.

The performance of these sites should be monitored as part of the strategy review.

Reserve Sites

The strategy has also identified a number of reserve sites. These sites represent sites that either require significant investment prior to becoming available to market, or sites that offer potential for sectoral investment, should further land be required during the course of the strategy, over and above the primary and secondary supply identified. This could arise if demand outperforms supply and/or if the role of strategic employment sites changes over time (e.g. if other uses or investment change the nature of the site or the site is considered as a departure from the local plan for another use).

These reserve sites could also be brought forward by specific investment decisions. For example, should an investor identify a reserve site as a preferred investment location, the site could be brought forward ahead of other sites in the strategy that have been identified as easier to deliver in the short to medium term. This scenario would be dependent on the said investor contributing to any costs to facilitate delivery of the reserve site.

5.6 Regional Recommendations

The strategy has identified a large portfolio of strategic employment sites across North Wales that will adequately fulfil forecast demand for such employment land over the strategy period to 2034. However, this does not preclude new sites coming forward within the region and the following section provides some regional recommendations that will support the development of strategic sites across North Wales.

Recommendation R1 – Flexible Planning Policy

All North Wales Planning Authorities should include within the local development plans sufficiently flexible policies in order to support new strategic employment land coming forward should it be considered essential to support a programme or a potential investor with specific site requirements.

Such a need could arise on a new site which falls outside of this strategy and local land use allocations or as an extension to an existing site. In both instances, this policy should facilitate strategic level economic development opportunities.

Justification – to ensure future potential strategic investment is not precluded and allow sites not identified at the local or regional level to come forward should investment demand emerge and impacts of such development be manageable.

Recommendation R2 – Site Investment Programme

The North Wales Planning Authorities should work together in order to develop a programme of investment in relation to the priority sites identified within the Strategy. This programme of investment should include all necessary infrastructure investment and/or further feasibility work required in order to ensure sites remain viable and attractive to key sector investors.

Justification – The programme will focus future investment on a small number of identified priority sites and encourage the North Wales Planning Authorities to plan and programme infrastructure investment alongside one another.

Recommendation R3 – Monitoring and Review of Take-Up

The North Wales Planning Authorities through the Economic Development Officers should continue to develop and maintain a system of tracking investment inquiries on a single shared database. Tracking should as a minimum include the following information:

- Sector;
- Inquiry size (site area or floorspace)
- Dominant use class
- Specification
- Reason for inquiry
- If investment doesn't emerge, reason for not locating in North Wales.

This monitoring framework should allow for a consistent definition of employment

sites across North Wales (e.g. strategic, sub-regional or local).

Justification – to enable the North Wales Planning Authorities to monitor demand across the region and more importantly understand investment decisions (positive or negative). Such information will be beneficial in any future updates of the strategy.

Recommendation R4 – Enterprise Zone Monitoring

The North Wales Planning Authorities through the Economic Development Officers should work closely with the Welsh Government Enterprise Zone team in order to monitor potential displacement of existing businesses in North Wales to the EZ in order to receive related benefits.

Justification – to enable an appreciation of the success of the Enterprise Zones in North Wales in the context of effect on other existing employment sites. This will again be useful in updating this strategy and local level employment land reviews.

Recommendation R5 – Sector Development / Testing

The North Wales Planning Authorities through the Economic Development Officers should work with the Sector Panels at the national level in order to promote North Wales strategic sites to potential investors and ensure that Welsh Government recognise the key sector strengths of the region and the opportunities to cluster around existing strategic investors.

The Authorities should consider some soft market testing in order to better understand the growth plans of their existing key employers as well as gauge potential market interest from other investors. This would assist in retaining exiting investors and attracting/promoting the region to future investors.

Justification – In order to ensure adequate promotion of the North Wales market within the key sectors.

Recommendation R6 – Wylfa Newydd

The North Wales Planning Authorities should continue to work closely with Horizon in relation to site requirements and supply chain opportunities. This work should be undertaken in line with the objectives of the recently published Draft SPG for Wylfa Nuclear New Build and the Topic Papers produced in support of the Joint Local Development Plan.

Justification – In order to ensure that Horizon are able to deliver the proposed nuclear new build sustainably, securing the necessary associated developments working alongside the Isle of Anglesey County Council in order to bring the greatest legacy benefits to the region.

Recommendation R7 – Update & review

The North Wales Planning Authorities should undertake regular review and update of this strategy in order to ensure it remains relevant to the development of strategic

employment sites in North Wales and reflects changes that emerge due to priority programmes such as the Energy Island Programme.

This will also ensure that the strategy remains valid alongside emerging and updated local development plans and any future regional or sub-regional collaborative studies/work.

Justification – In order to ensure the strategy remains relevant and up to date.

6 Conclusions & Recommendations

The strategy has considered trends and forecasts in the key sectors across the North Wales region, reviewed the strategic land portfolio and considered how this portfolio will meet demand over the strategy period.

In-line with trends at the local level it can be concluded that the North Wales economy has an adequate provision of employment land that is able to meet the needs of strategic investors. This land is distributed fairly evenly across the region with concentrations in the North East and on Anglesey, partly reflecting the Enterprise Zone allocations within these areas.

The study brief set a number of clear objectives for the strategy as outlined below:

- Understand the role and function of strategic employment sites in North Wales;
- Assess how locally defined strategic sites and any proposed extensions or new allocations in adopted Local Development Plans (LDP's) are capable of meeting the needs of North Wales for the next 20 years;
- Identify any gaps in employment land provision (in terms of quality, quantity and location) and to give a broad indication of where site expansion should take place and where new sites should be allocated and/or developed;
- Provide an evidence base for regional collaboration between the seven LPA's in North Wales, in accordance with the provisions of TAN 23 and with those of adjoining areas (e.g. Mid Wales and the Mersey Dee area); and
- Ensure that any recommendations comply with the principles of sustainable development in the Welsh context and which can be suitably and practically delivered.

The strategy has sought to define a role and sector focus for each of the strategic employment sites, setting a context for future promotion and development across the region. This does not restrict investment from outside of sector foci but provides a foundation on which to promote and market strategic sites across the region moving forward.

All sites identified are consistent with development plans at the local level, many having been allocated as employment land for a number of years. Emerging or new strategic allocations as part of the Local Development Plan process have been included within the strategy.

In light of a limited need to allocate new sites across the region, the strategy has focussed on identifying gaps in employment land provision in terms of quality and location. In light of this, a number of recommendations are made in relation to which sites (geographically) should be promoted and where sites require a process of rationalisation or regeneration.

The strategy therefore provides a framework for promotion and investment in strategic sites across North Wales which is sustainable and realistic in light of employment forecasts, priority sites and programmes.

Appendix A

Key Sector Definitions

The following tables provide the Standard Industrial Classification (SIC) code definitions for the priority sectors as set Welsh Government. It should be noted that some SIC codes appear in more than one priority sector and that some SIC codes are only partially included with a sector.

Advanced Materials and Manufacturing

SIC code	Proportion of code within sector
1310 : Preparation and spinning of textile fibres	1
1320 : Weaving of textiles	1
1330 : Finishing of textiles	1
1392 : Manufacture of made-up textile articles except apparel	1
1395 : Manufacture of non-wovens and articles made from non-wovens, except apparel	1
1396 : Manufacture of other technical and industrial textiles	1
1712 : Manufacture of paper and paperboard	1
2011 : Manufacture of industrial gases	1
2012 : Manufacture of dyes and pigments	1
2013 : Manufacture of other inorganic basic chemicals	1
2014 : Manufacture of other organic basic chemicals	1
2015 : Manufacture of fertilizers and nitrogen compounds	1
2016 : Manufacture of plastics in primary forms	1
2017 : Manufacture of synthetic rubber in primary forms	1
2020 : Manufacture of pesticides and other agrochemical products	1
2030 : Manufacture of paints, varnishes and similar coatings, printing ink and mastics	1
2041 : Manufacture of soap and detergents, cleaning and polishing preparations	1
2042 : Manufacture of perfumes and toilet preparations	1
2051 : Manufacture of explosives	1
2052 : Manufacture of glues	1
2053 : Manufacture of essential oils	1
2059 : Manufacture of other chemical products n.e.c.	1
2060 : Manufacture of man-made fibres	1
2211 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres	1
2219 : Manufacture of other rubber products	1
2221 : Manufacture of plastic plates, sheets, tubes and profiles	1
2222 : Manufacture of plastic packing goods	1
2229 : Manufacture of other plastic products	1
2311 : Manufacture of flat glass	1
2313 : Manufacture of hollow glass	1
2314 : Manufacture of glass fibres	1
2319 : Manufacture and processing of other glass, including technical glassware	1
2343 : Manufacture of ceramic insulators and insulating fittings	1
2344 : Manufacture of other technical ceramic products	1
2349 : Manufacture of other ceramic products n.e.c.	1
2365 : Manufacture of fibre cement	1
2391 : Production of abrasive products	1
2399 : Manufacture of other non-metallic mineral products n.e.c.	1
2410 : Manufacture of basic iron and steel and of ferro-alloys	1
2420 : Manufacture of tubes, pipes, hollow profiles and related fittings, of steel	1
2431 : Cold drawing of bars	1
2432 : Cold rolling of narrow strip	1
2433 : Cold forming or folding	1
2434 : Cold drawing of wire	1

SIC code	Proportion of code within sector
2441 : Precious metals production	1
2442 : Aluminium production	1
2443 : Lead, zinc and tin production	1
2444 : Copper production	1
2445 : Other non-ferrous metal production	1
2446 : Processing of nuclear fuel	1
2451 : Casting of iron	1
2452 : Casting of steel	1
2453 : Casting of light metals	1
2454 : Casting of other non-ferrous metals	1
2511 : Manufacture of metal structures and parts of structures	1
2521 : Manufacture of central heating radiators and boilers	1
2530 : Manufacture of steam generators, except central heating hot water boilers	1
2540 : Manufacture of weapons and ammunition	1
2550 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy	1
2561 : Treatment and coating of metals	1
2562 : Machining	1
2571 : Manufacture of cutlery	1
2573 : Manufacture of tools	1
2592 : Manufacture of light metal packaging	1
2593 : Manufacture of wire products, chain and springs	1
2594 : Manufacture of fasteners and screw machine products	1
2611 : Manufacture of electronic components	1
2612 : Manufacture of loaded electronic boards	1
2620 : Manufacture of computers and peripheral equipment	1
2630 : Manufacture of communication equipment	1
2640 : Manufacture of consumer electronics	1
2651 : Manufacture of instruments and appliances and appliances for measuring, testing and navigation	1
2670 : Manufacture of optical instruments and photographic equipment	1
2711 : Manufacture of electric motors, generators and transformers	1
2720 : Manufacture of batteries and accumulators	1
2731 : Manufacture of fibre optic cables	1
2732 : Manufacture of other electronic and electric wires and cables	1
2740 : Manufacture of electric lighting equipment	1
2751 : Manufacture of electric domestic appliances	1
2790 : Manufacture of other electrical equipment	1
2811 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	1
2812 : Manufacture of fluid power equipment	1
2813 : Manufacture of other pumps and compressors	1
2814 : Manufacture of taps and valves	1
2815 : Manufacture of bearings, gears, gearing and driving elements	1
2821 : Manufacture of ovens, furnaces and furnace burners	1
2822 : Manufacture of lifting and handling equipment	1
2823 : Manufacture of office machinery and equipment (except computers and peripheral equipment)	1
2824 : Manufacture of power-driven hand tools	1
2825 : Manufacture of non-domestic cooling and ventilation equipment	1
2829 : Manufacture of other general-purpose machinery n.e.c.	1
2830 : Manufacture of agricultural and forestry machinery	1
2841 : Manufacture of metal forming machinery	1
2849 : Manufacture of other machine tools	1
2891 : Manufacture of machinery for metallurgy	1

SIC code	Proportion of code within sector
2892 : Manufacture of machinery for mining, quarrying and construction	1
2893 : Manufacture of machinery for food, beverage and tobacco processing	1
2894 : Manufacture of machinery for textile, apparel and leather production	1
2895 : Manufacture of machinery for paper and paperboard production	1
2896 : Manufacture of plastics and rubber machinery	1
2899 : Manufacture of other special-purpose machinery n.e.c.	1
2910 : Manufacture of motor vehicles	1
2920 : Manufacture of bodies (coachwork) for motor vehicles, manufacture of trailers and semi-trailers	1
2931 : Manufacture of electrical and electronic equipment for motor vehicles and their engines	1
2932 : Manufacture of other parts and accessories for motor vehicles	1
3011 : Building of ships and floating structures	1
3012 : Building of pleasure and sporting boats	1
3020 : Manufacture of railway locomotives and rolling stock	1
3030 : Manufacture of air and spacecraft and related machinery	1
3040 : Manufacture of military fighting vehicles	1
3091 : Manufacture of motorcycles	1
3092 : Manufacture of bicycles and invalid carriages	1
3099 : Manufacture of other transport equipment n.e.c.	1
3211 : Striking of coins	1
3220 : Manufacture of musical instruments	1
3312 : Repair of machinery	1
3313 : Repair of electronic and optical equipment	1
3314 : Repair of electrical equipment	1
3315 : Repair and maintenance of ships and boats	1
3316 : Repair and maintenance of aircraft and spacecraft	1
3317 : Repair and maintenance of other transport equipment n.e.c.	1
5122 : Space transport	1

Construction

SIC code	Proportion of code within sector
0811 : Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate	1
0812 : Operation of gravel and sand pits; mining of clays and kaolin	1
1610 : Sawmilling and planing of wood	1
1621 : Manufacture of veneer sheets and wood-based panels	1
1622 : Manufacture of assembled parquet floors	1
1623 : Manufacture of other builders' carpentry and joinery	1
2320 : Manufacture of refractory products	1
2331 : Manufacture of ceramic tiles and flags	1
2332 : Manufacture of bricks, tiles and construction products, in baked clay	1
2342 : Manufacture of ceramic sanitary fixtures	1
2351 : Manufacture of cement	1
2352 : Manufacture of lime and plaster	1
2361 : Manufacture of concrete products for construction purposes	1
2362 : Manufacture of plaster products for construction purposes	1
2363 : Manufacture of ready-mixed concrete	1
2364 : Manufacture of mortars	1

SIC code	Proportion of code within sector
2365 : Manufacture of fibre cement	1
2369 : Manufacture of other articles of concrete, plaster and cement	1
2511 : Manufacture of metal structures and parts of structures	1
2512 : Manufacture of doors and windows of metal	1
2521 : Manufacture of central heating radiators and boilers	1
4110 : Development of building projects	1
4120 : Construction of buildings	1
4211 : Construction of roads and motorways	1
4212 : Construction of railways and underground railways	1
4213 : Construction of bridges and tunnels	1
4221 : Construction of utility projects for fluids	1
4222 : Construction of utility projects for electricity and telecommunications	1
4291 : Construction of water projects	1
4299 : Construction of other civil engineering projects n.e.c.	1
4311 : Demolition	1
4312 : Site preparation	1
4313 : Test drilling and boring	1
4321 : Electrical installation	1
4322 : Plumbing, heat and air-conditioning installation	1
4329 : Other construction installation	1
4331 : Plastering	1
4332 : Joinery installation	1
4333 : Floor and wall covering	1
4334 : Painting and glazing	1
4339 : Other building completion and finishing	1
4391 : Roofing activities	1
4399 : Other specialised construction activities n.e.c.	1
7111 : Architectural activities	1
7490 : Other professional, scientific and technical activities n.e.c.	0.2

Creative Industries

SIC code	Proportion of code within sector
1411 : Manufacture of leather clothes	0.005
1412 : Manufacture of workwear	0.005
1413 : Manufacture of outerwear	0.005
1414 : Manufacture underwear	0.005
1419 : Manufacture of other wearing apparel and accessories n.e.c.	0.005
1420 : Manufacture of articles of fur	0.005
1431 : Manufacture of knitted and crocheted hosiery	0.005
1439 : Manufacture of other knitted and crocheted apparel	0.005
1512 : Manufacture of luggage, handbags and the like, saddlery and harness	0.005
1520 : Manufacture of footwear	0.005
1811 : Printing of newspapers	1
1813 : Pre-press and pre-media services	1
1820 : Reproduction of recorded media	0.25
4778 : Other retail sale of new goods in specialised stores	0.03
4779 : Retail sale of second-hand goods in stores	0.269
5811 : Book publishing	1

SIC code	Proportion of code within sector
5813 : Publishing of newspapers	1
5814 : Publishing journals and periodicals	1
5819 : Other publishing activities	0.5
5821 : Publishing of computer games	1
5829 : Other software publishing	1
5911 : Motion picture, video and television programme production activities	1
5912 : Motion picture, video and television programme post-production activities	1
5913 : Motion picture, video and television programme distribution activities	1
5914 : Motion picture projection activities	1
5920 : Sound recording and music publishing activities	1
6010 : Radio broadcasting	1
6020 : Television programming and broadcasting activities	1
6201 : Computer programming activities	0.05
6391 : News agency activities	1
7111 : Architectural activities	1
7311 : Advertising agencies	1
7312 : Media representation services	1
7410 : Specialised design activities	1
7420 : Photographic activities	0.25
7810 : Activities of employment placement agencies	0.2
9001 : Performing arts	1
9002 : Support activities to performing arts	1
9003 : Artistic creation	1
9004 : Operation of arts facilities	1

Energy and Environment

SIC code	Proportion of code within sector
0510 : Mining of Hard Coal	1
0520 : Mining of lignite	1
0610 : Extraction of crude petroleum	1
0620 : Extraction of natural gas	1
0892 : Extraction of peat	1
0910 : Support activities for petroleum and natural gas mining	1
1395 : Manufacture of non-wovens and articles made from non-wovens, except apparel	1
1910 : Manufacture of coke oven products	1
1920 : Manufacture of refined petroleum products	1
2211 : Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres	1
2221 : Manufacture of plastic plates, sheets, tubes and profiles	1
2446 : Processing of nuclear fuel	1
2521 : Manufacture of central heating radiators and boilers	1
2529 : Manufacture of other tanks, reservoirs and containers of metal	1
2530 : Manufacture of steam generators, except central heating hot water boilers	1
2611 : Manufacture of electronic components	1
2651 : Manufacture of instruments and appliances and appliances for measuring, testing and navigation	1
2711 : Manufacture of electric motors, generators and transformers	1
2712 : Manufacture of electricity distribution and control apparatus	1
2720 : Manufacture of batteries and accumulators	1
2733 : Manufacture of wiring devices	1

SIC code	Proportion of code within sector
2740 : Manufacture of electric lighting equipment	1
2790 : Manufacture of other electrical equipment	1
2811 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines	1
2825 : Manufacture of non-domestic cooling and ventilation equipment	1
2931 : Manufacture of electrical and electronic equipment for motor vehicles and their engines	1
3313 : Repair of electronic and optical equipment	1
3314 : Repair of electrical equipment	1
3320 : Installation of industrial machinery and equipment	1
3511 : Production of electricity	1
3512 : Transmission of electricity	1
3513 : Distribution of electricity	1
3514 : Trade of electricity	1
3521 : Manufacture of gas	1
3522 : Distribution of gaseous fuels through mains	1
3523 : Trade of gas through mains	1
3530 : Steam and air conditioning supply	1
3600 : Water collection, treatment and supply	1
3700 : Sewerage	1
3811 : Collection of non-hazardous waste	1
3812 : Collection of hazardous waste	1
3821 : Treatment and disposal of non-hazardous waste	1
3822 : Treatment and disposal of hazardous waste	1
3831 : Dismantling of wrecks	1
3832 : Recovery of sorted materials	1
3900 : Remediation activities and other waste management services	1
4120 : Construction of buildings	1
4221 : Construction of utility projects for fluids	1
4222 : Construction of utility projects for electricity and telecommunications	1
4291 : Construction of water projects	1
4299 : Construction of other civil engineering projects n.e.c.	1
4311 : Demolition	1
4312 : Site preparation	1
4313 : Test drilling and boring	1
4321 : Electrical installation	1
4322 : Plumbing, heat and air-conditioning installation	1
4329 : Other construction installation	1
4612 : Agents involved in the sale of fuels, ores, metals and industrial chemicals	1
4671 : Wholesale of solid,liquid and gaseous fuels and related products	1
4677 : Wholesale of waste and scrap	1
4950 : Transport via pipeline	1
7022 : Business and other management consultancy activities	1
7111 : Architectural activities	1
7112 : Engineering activities and related technical consultancy	1
7120 : Technical testing and analysis	1
7219 : Other research and experimental development on natural sciences and engineering	1
8110 : Combined facilities support activities	1
8121 : General cleaning of buildings	1
8129 : Other cleaning services	1
8130 : Landscape service activities	1
8292 : Packaging activities	1
9104 : Botanical and zoological gardens and nature reserves activities	1

Finance and Professional Services

SIC code	Proportion of code within sector
6411 : Central banking	1
6419 : Other monetary intermediation	1
6420 : Activities of holding companies	1
6430 : Trusts, funds and similar entities	1
6491 : Financial leasing	1
6492 : Other credit granting	1
6499 : Other financial intermediation not elsewhere classified	1
6511 : Life insurance	1
6512 : Non-life insurance	1
6520 : Reinsurance	1
6530 : Pension funding	1
6611 : Administration of financial markets	1
6612 : Security and commodity contracts dealing activities	1
6619 : Activities auxiliary to financial intermediation n.e.c.	1
6621 : Risk and damage evaluation	1
6622 : Activities of insurance agents and brokers	1
6629 : Other activities auxiliary to insurance and pension funding	1
6630 : Fund management activities	1
6810 : Buying and selling of own real estate	1
6820 : Renting and operating of own or leased real estate	1
6831 : Real estate agencies	1
6832 : Management of real estate on a fee or contract basis	1
6910 : Legal activities	1
6920 : Accounting, bookkeeping and auditing activities;tax consultancy	1
7010 : Activities of head offices	1
7021 : Public relations and communications activities	1
7022 : Business and other management consultancy activities	1
7112 : Engineering activities and related technical consultancy	1
7120 : Technical testing and analysis	1
7320 : Market research and public opinion polling	1
7430 : Translation and interpretation activities	1
7490 : Other professional, scientific and technical activities n.e.c.	1
7740 : Leasing of intellectual property and similar products, except copyright works	1
7810 : Activities of employment placement agencies	1
7820 : Temporary employment agency activities	1
7830 : Human resources provision and management of human resources functions	1
8010 : Private security activities	1
8020 : Security systems service activities	1
8030 : Investigation activities	1
8110 : Combined facilities support activities	1
8121 : General cleaning of buildings	1
8122 : Other building and industrial cleaning activities	1
8299 : Other business support service activities n.e.c.	1

Food and Farming

SIC code	Proportion of code within sector
0111 : Growing of cereals (except rice), leguminous crops and oil seeds	1

SIC code	Proportion of code within sector
0112 : Growing of rice	1
0113 : Growing of vegetables and melons, roots and tubers	1
0114 : Growing of sugar cane	1
0115 : Growing of tobacco	1
0116 : Growing of fibre crops	1
0119 : Growing of other non-perennial crops	1
0121 : Growing of grapes	1
0122 : Growing of tropical and subtropical fruits	1
0123 : Growing of citrus fruits	1
0124 : Growing of pome fruits and stone fruits	1
0125 : Growing of other tree and bush fruits and nuts	1
0126 : Growing of oleaginous fruits	1
0127 : Growing of beverage crops	1
0128 : Growing of spices, aromatic, drug and pharmaceutical crops	1
0129 : Growing of other perennial crops	1
0130 : Plant propagation	1
0141 : Raising of dairy cattle	1
0142 : Raising of other cattle and buffaloes	1
0143 : Raising of horses and other equines	1
0144 : Raising of camels and camelids	1
0145 : Raising of sheep and goats	1
0146 : Raising of swine/pigs	1
0147 : Raising of poultry	1
0149 : Raising of other animals	1
0150 : Mixed farming	1
0161 : Support activities for crop production	1
0162 : Support activities for animal production	1
0163 : Post-harvest crop activities	1
0164 : Seed processing for propagation	1
0170 : Hunting, trapping and related service activities	1
0311 : Marine fishing	1
0312 : Freshwater fishing	1
0321 : Marine aquaculture	1
0322 : Freshwater aquaculture	1
1011 : Processing and preserving of meat	1
1012 : Processing and preserving of poultry meat	1
1013 : Production of meat and poultry meat products	1
1020 : Processing and preserving of fish, crustaceans and molluscs	1
1031 : Processing and preserving of potatoes	1
1032 : Manufacture of fruit and vegetable juice	1
1039 : Other processing and preserving of fruit and vegetables	1
1041 : Manufacture of oils and fats	1
1042 : Manufacture of margarine and similar edible fats	1
1051 : Operation of Dairies and Cheese making	1
1052 : Manufacture of ice cream	1
1061 : Manufacture of breakfast cereals and cereals-based food	1
1062 : Manufacture of starches and starch products	1
1071 : Manufacture of bread; manufacture of fresh pastry goods and cakes	1
1072 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes	1
1073 : Manufacture of macaroni, noodles, couscous and similar farinaceous products	1
1081 : Manufacture of sugar	1
1082 : Manufacture of cocoa ,chocolate and sugar confectionery	1
1083 : Processing of tea and coffee	1

SIC code	Proportion of code within sector
1084 : Manufacture of condiments and seasonings	1
1085 : Manufacture of prepared meals and dishes	1
1086 : Manufacture of homogenized food preparations and dietetic food	1
1089 : Manufacture of other food products n.e.c.	1
1091 : Manufacture of prepared feeds for farm animals	1
1092 : Manufacture of prepared pet foods	1
1101 : Distilling, rectifying and blending of spirits	1
1102 : Manufacture of wine from grape	1
1103 : Manufacture of cider and other fruit wines	1
1104 : Manufacture of other non-distilled fermented beverages	1
1105 : Manufacture of beer	1
1106 : Manufacture of malt	1
1107 : Manufacture of soft drinks; production of mineral waters and other bottled waters	1

ICT

SIC code	Proportion of code within sector
2611 : Manufacture of electronic components	1
2612 : Manufacture of loaded electronic boards	1
2620 : Manufacture of computers and peripheral equipment	1
2630 : Manufacture of communication equipment	1
2640 : Manufacture of consumer electronics	1
2651 : Manufacture of instruments and appliances and appliances for measuring, testing and navigation	1
2680 : Manufacture of magnetic and optical media	1
2731 : Manufacture of fibre optic cables	1
2732 : Manufacture of other electronic and electric wires and cables	1
5829 : Other software publishing	1
6110 : Wired telecommunications activities	1
6120 : Wireless telecommunications activities	1
6130 : Satellite telecommunications activities	1
6190 : Other telecommunications activities	1
6201 : Computer programming activities	1
6202 : Information technology consultancy activities	1
6203 : Computer facilities management activities	1
6209 : Other information technology service activities	1
6311 : Data processing, hosting and related activities	1
6312 : Web portals	1
6399 : Other information service activities n.e.c.	1

Life Sciences

SIC code	Proportion of code within sector
2013 : Manufacture of other inorganic basic chemicals	1
2014 : Manufacture of other organic basic chemicals	1
2015 : Manufacture of fertilizers and nitrogen compounds	1
2020 : Manufacture of pesticides and other agrochemical products	1
2110 : Manufacture of basic pharmaceutical products	1

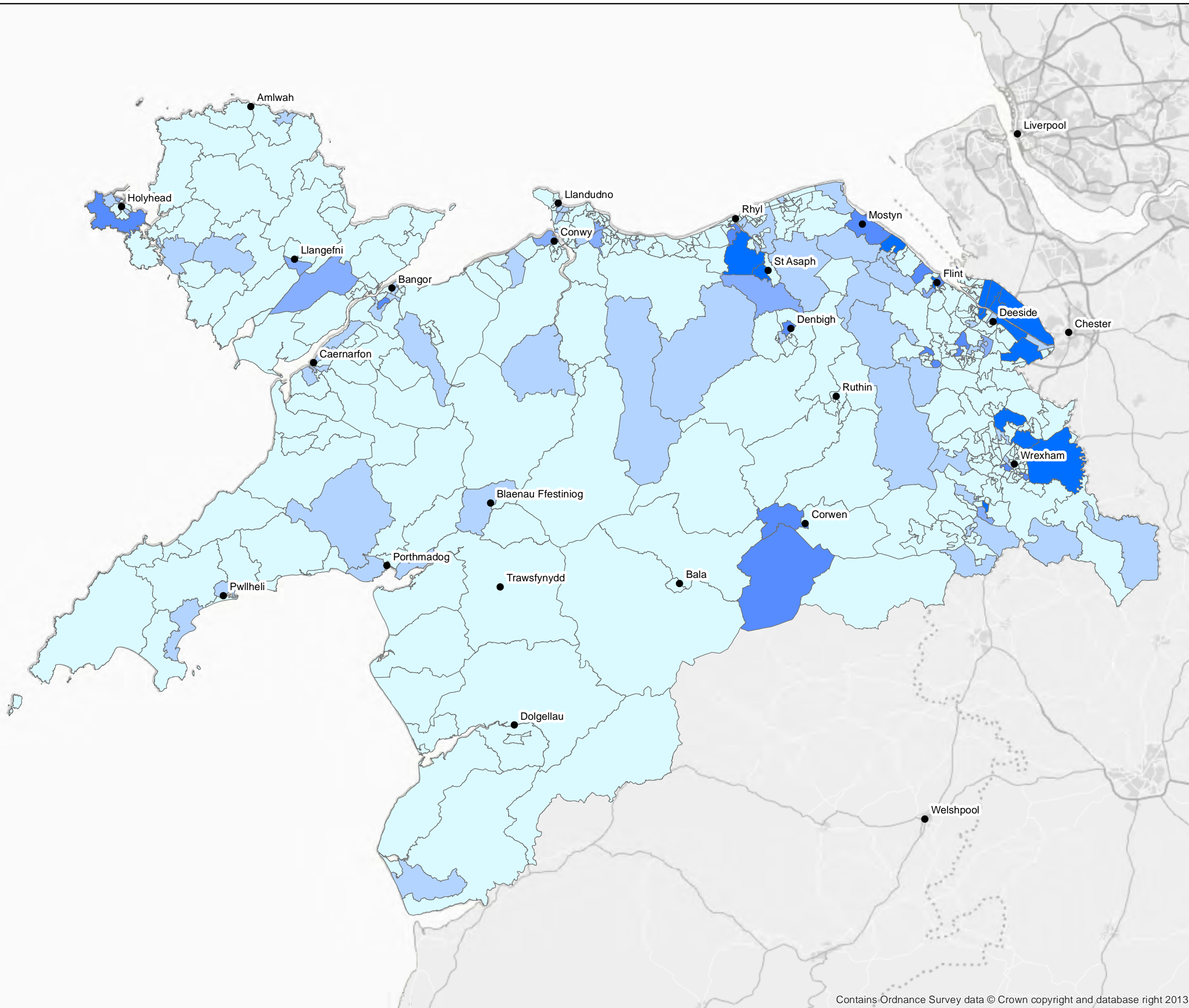
2120 : Manufacture of pharmaceutical preparations	1
2660 : Manufacture of irradiation, electromedical and electrotherapeutic equipment	1
2670 : Manufacture of optical instruments and photographic equipment	1
3250 : Manufacture of medical and dental instruments and supplies	1
3313 : Repair of electronic and optical equipment	1
7211 : Research and experimental development on biotechnology	1
7219 : Other research and experimental development on natural sciences and engineering	1

Tourism

SIC code	Proportion of code within sector
4910 : Passenger rail transport, interurban	1
4932 : Taxi operation	1
4939 : Other passenger land transport	1
5010 : Sea and coastal passenger water transport	1
5030 : Inland passenger water transport	1
5110 : Passenger air transport	1
5510 : Hotels and similar accommodation	1
5520 : Holiday and other collective accommodation	1
5530 : Recreational vehicle parks, trailer parks and camping grounds	1
5590 : Other accommodation	1
5610 : Restaurants and mobile food service activities	1
5621 : Event catering activities	1
5629 : Other food services	1
5630 : Beverage serving activities	1
7711 : Renting and leasing of cars and light motor vehicles	1
7721 : Renting and leasing of recreational and sports goods	1
7734 : Renting and leasing of water transport equipment	0.7786
7735 : Renting and leasing of air transport equipment	0.9073
7911 : Travel agency activities	1
7912 : Tour operator activities	1
7990 : Other reservation service and related activities	1
8230 : Convention and trade show organisers	1
9001 : Performing arts	1
9002 : Support activities to performing arts	1
9003 : Artistic creation	1
9004 : Operation of arts facilities	1
9102 : Museums activities	1
9103 : Operation of historical sites and buildings and similar visitor attractions	1
9104 : Botanical and zoological gardens and nature reserves activities	1
9200 : Gambling and betting activities	1
9311 : Operation of sports facilities	1
9319 : Other sports activities	1
9321 : Activities of amusement parks and theme parks	1
9329 : Other amusement and recreation activities n.e.c.	1

Appendix B

Employment in Key Sectors



Legend

Advanced Materials and Manufacturing

Number of Employees

- 0 - 10
- 11 - 50
- 51 - 100
- 101 - 250
- 250 +

● Key Settlements

P0	2014-01-27	EB	DB	DB
Issue	Date	By	Chkd	Appd

Metres

0 6,000 12,000 24,000

ARUP

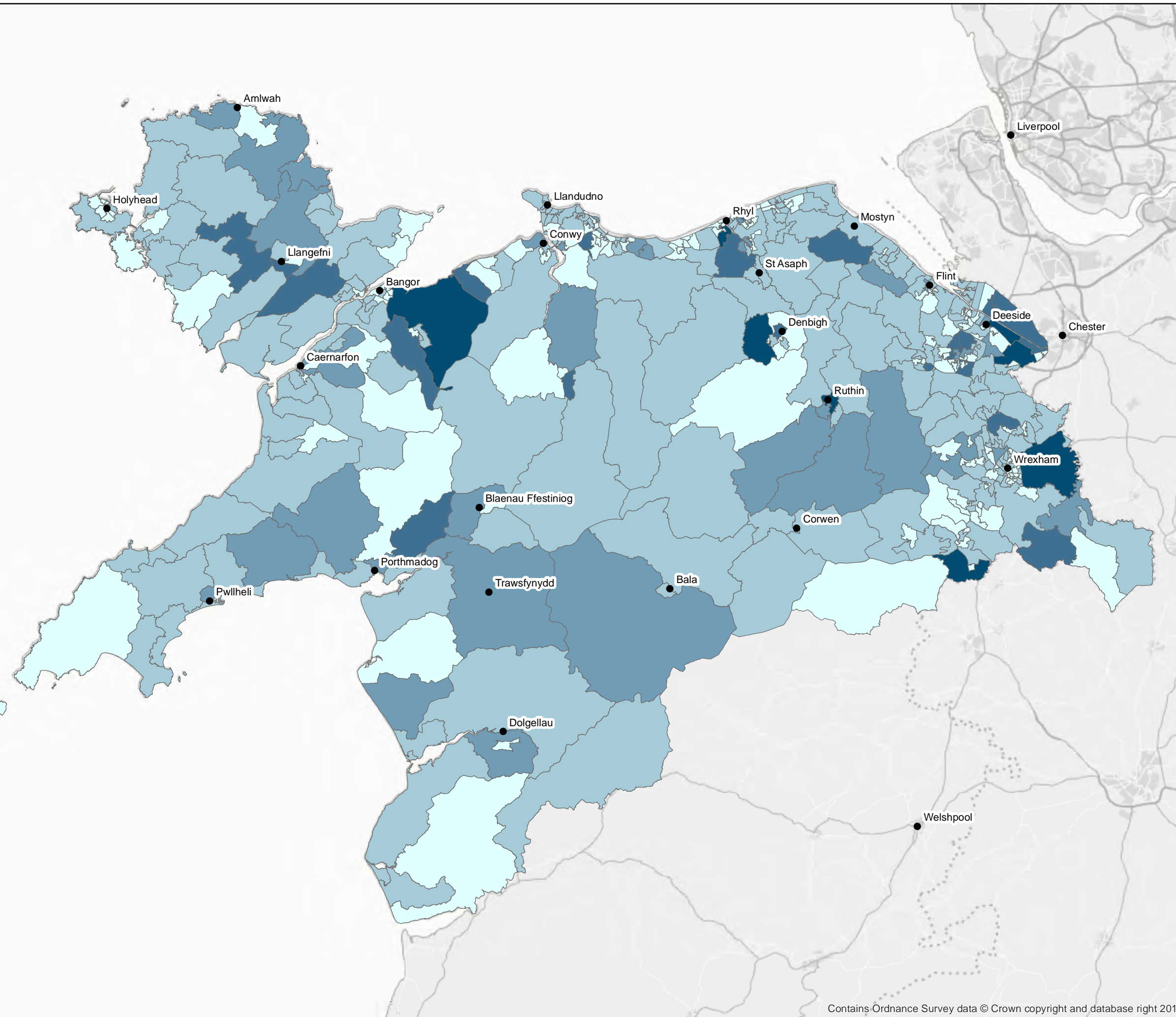
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North Wales Planning Authorities

Job Title
Regional Employment Land Strategy for North

Key Sectors - Advanced Materials and Manufacturing

Scale at A3
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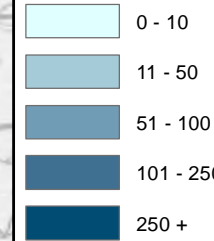
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Drawing No 017	Issue P0



Legend

Construction

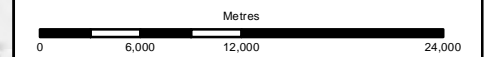
Number of Employees



● Key Settlements

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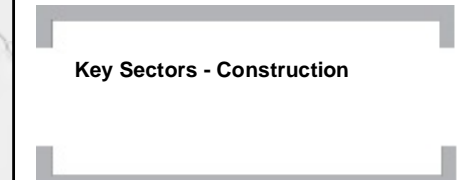
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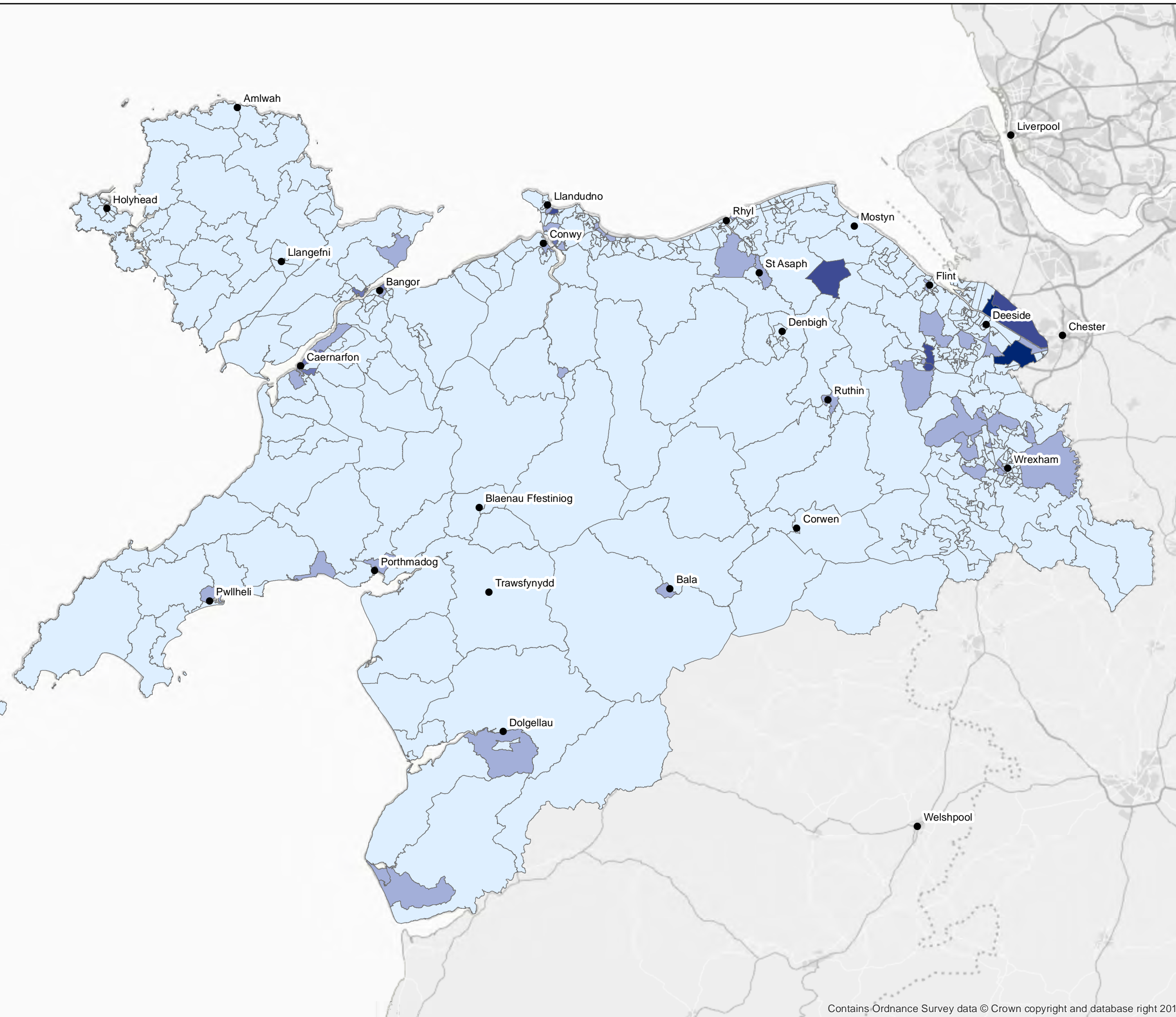
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Scale at A3
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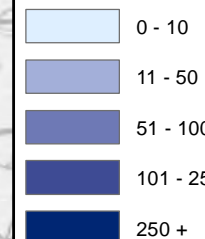
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Legend

Creative Industries

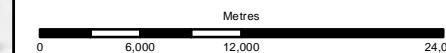
Number of Employees



● Key Settlements

P0	2014-01-27	EB	DB	DB
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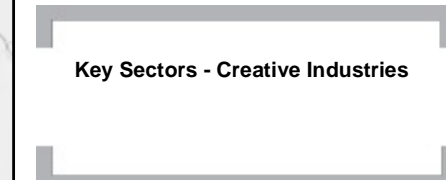
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North Wales Planning Authorities

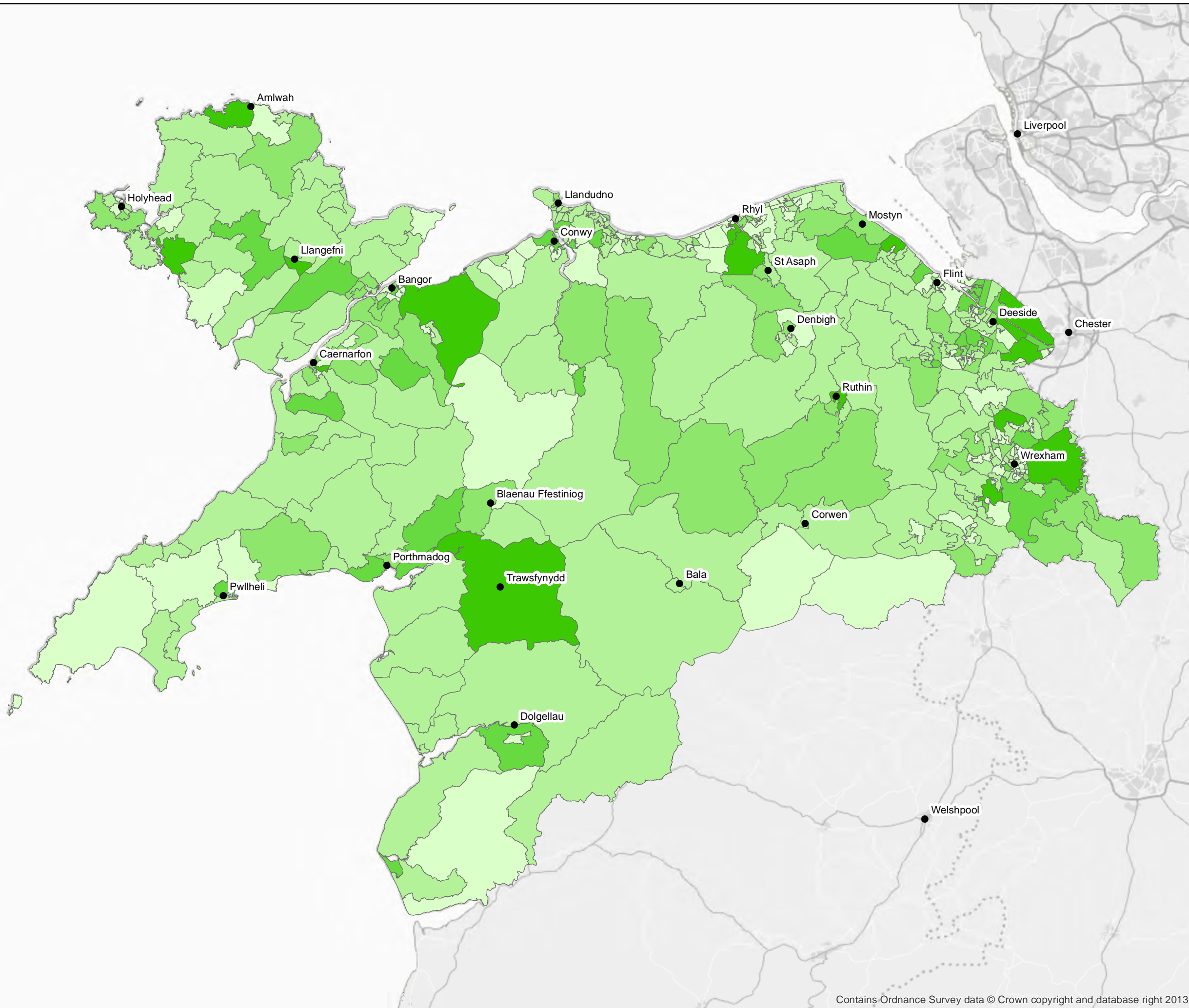
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Regional Employment Land Strategy for North



Scale at A3
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Job No 233084-00	Drawing Status Preliminary
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Drawing No 019	Issue P0
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Legend

Energy and Environment

Number of Employees

- 0 - 10
- 11 - 50
- 51 - 100
- 101 - 250
- 250 +

● Key Settlements

P0	2014-01-27	EB	DB	DB
Issue	Date	By	Chkd	Appd

Metres

0 6,000 12,000 24,000

ARUP

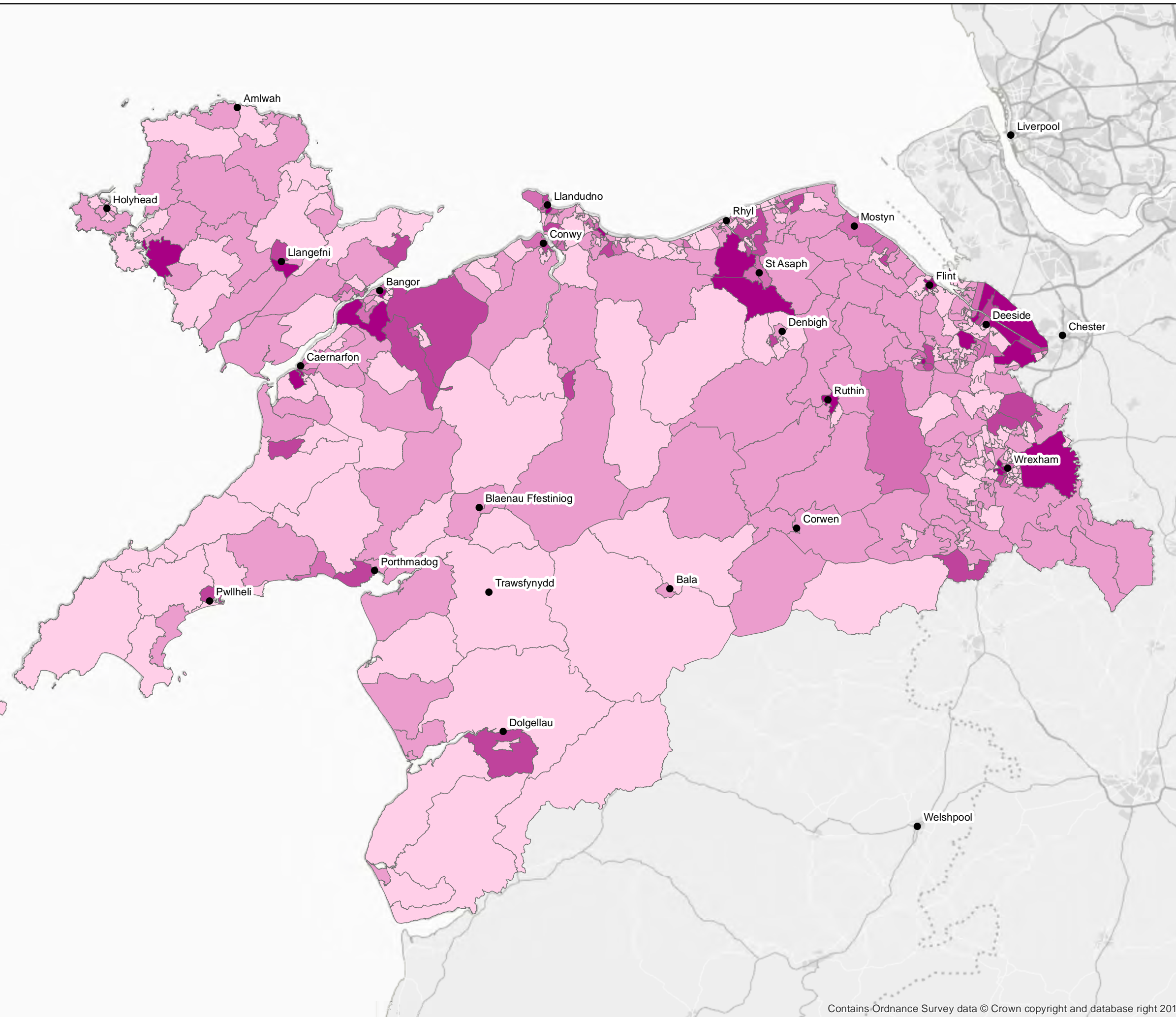
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North Wales Planning Authorities

Job Title
Regional Employment Land Strategy for North

Key Sectors - Energy and Environment

Scale at A3
1:450,000

Job No 233084-00	Drawing Status Preliminary
Drawing No 020	Issue P0



Legend

Financial and Professional Services

Number of Employees

0 - 10

11 - 50

51 - 100

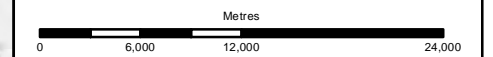
101 - 250

250 +

● Key Settlements

P0	2014-01-27	EB	DB	DB
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Issue	Date	By	Chkd	Appd
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ARUP

Client
North Wales Planning Authorities

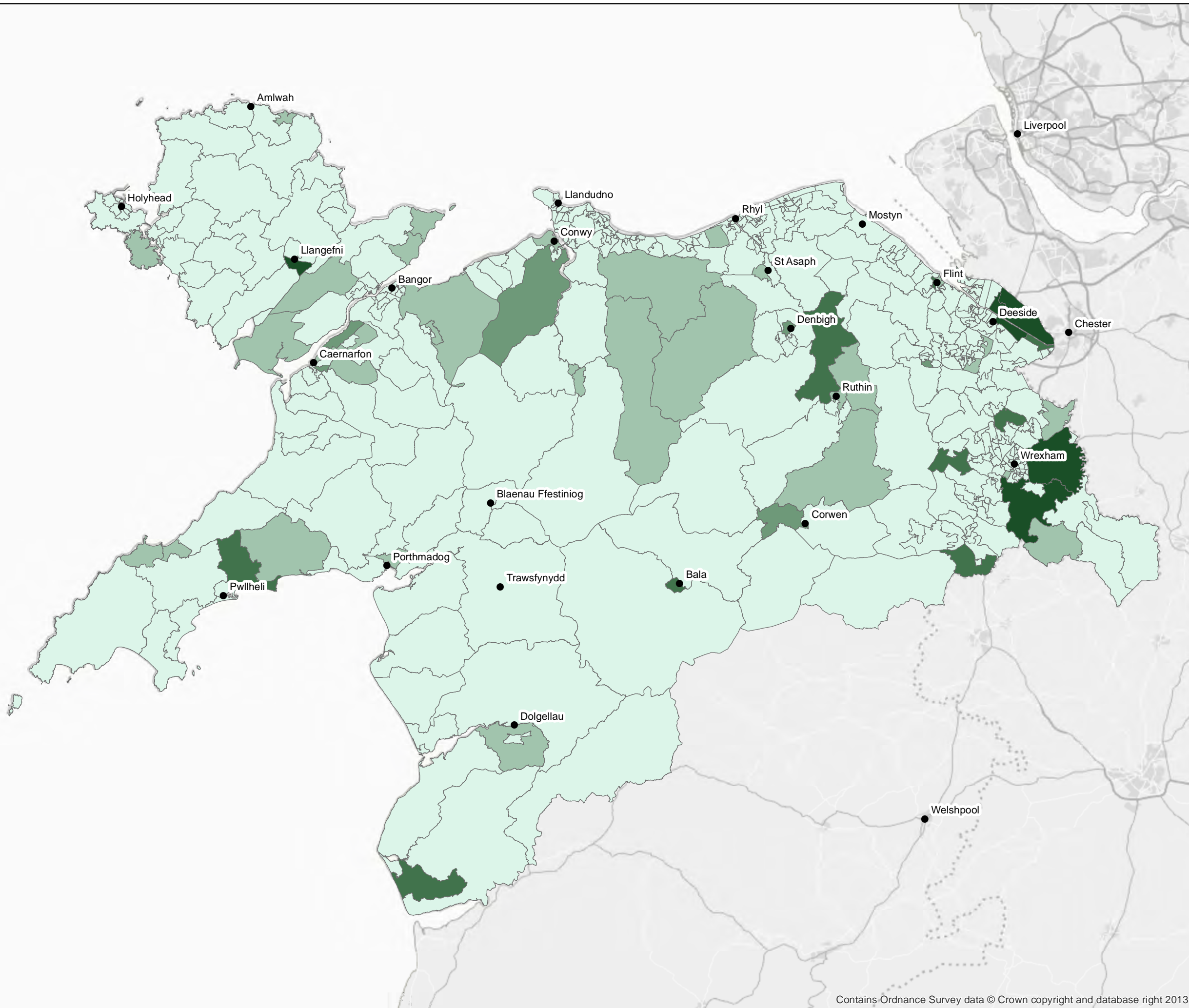
Job Title
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Scale at A3
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Job No 233084-00	Drawing Status Preliminary
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Drawing No 021	Issue P0
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Legend

Food and Farming

Number of Employees

- 0 - 10
- 11 - 50
- 51 - 100
- 101 - 250
- 250 +

● Key Settlements

P0	2014-01-27	EB	DB	DB
Issue	Date	By	Chkd	Appd

Metres

ARUP

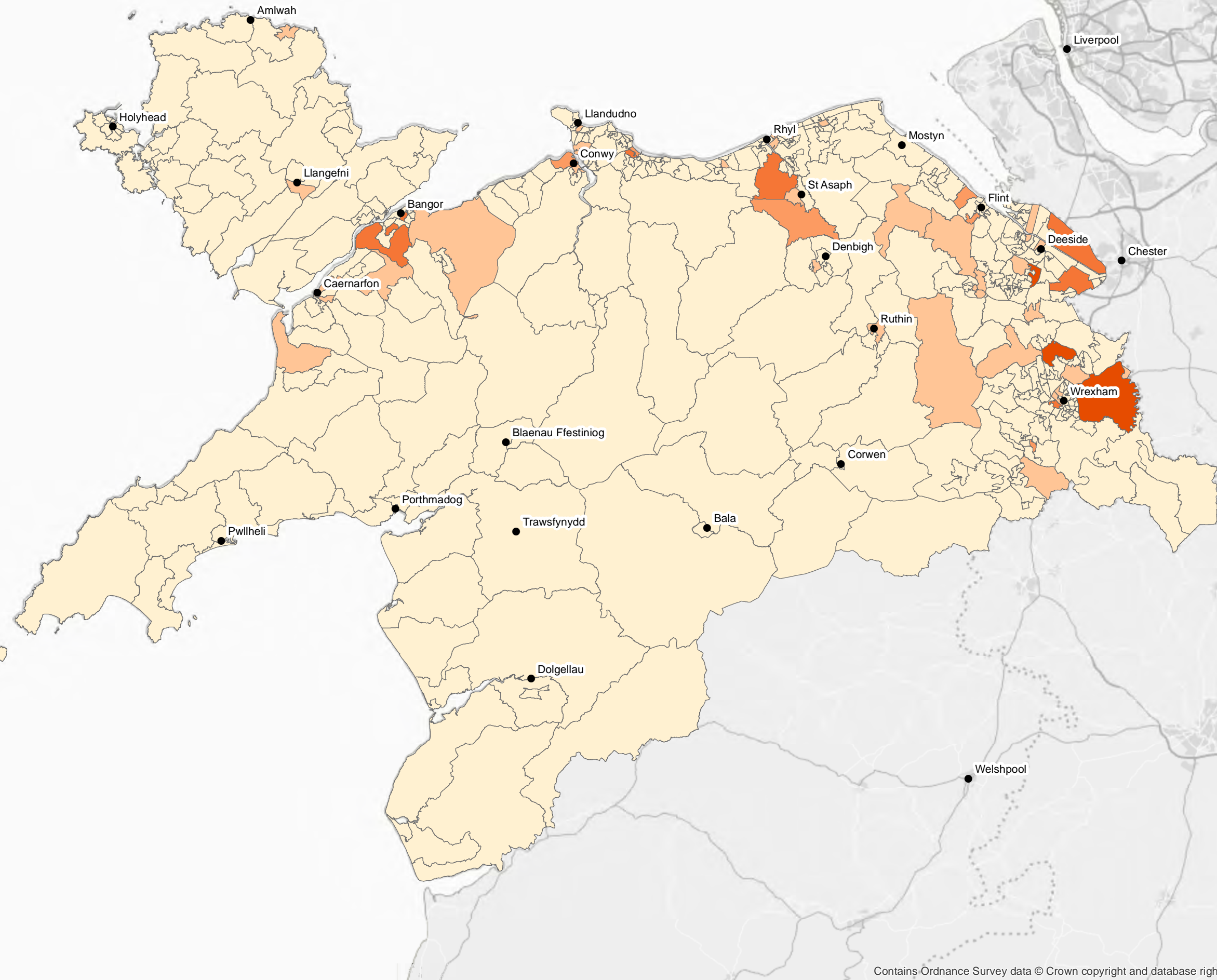
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Job Title
Regional Employment Land Strategy for North

Key Sectors - Food and Farming

Scale at A3
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Job No 233084-00	Drawing Status Preliminary
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Legend

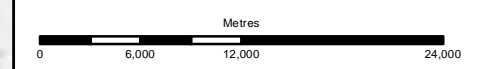
ICT

Number of Employees

- 0 - 10
- 10 - 50
- 51 - 100
- 101 - 250
- 250 +
- Key Settlements

P0	2014-01-27	EB	DB	DB
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Issue	Date	By	Chkd	Appd



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North Wales Planning Authorities

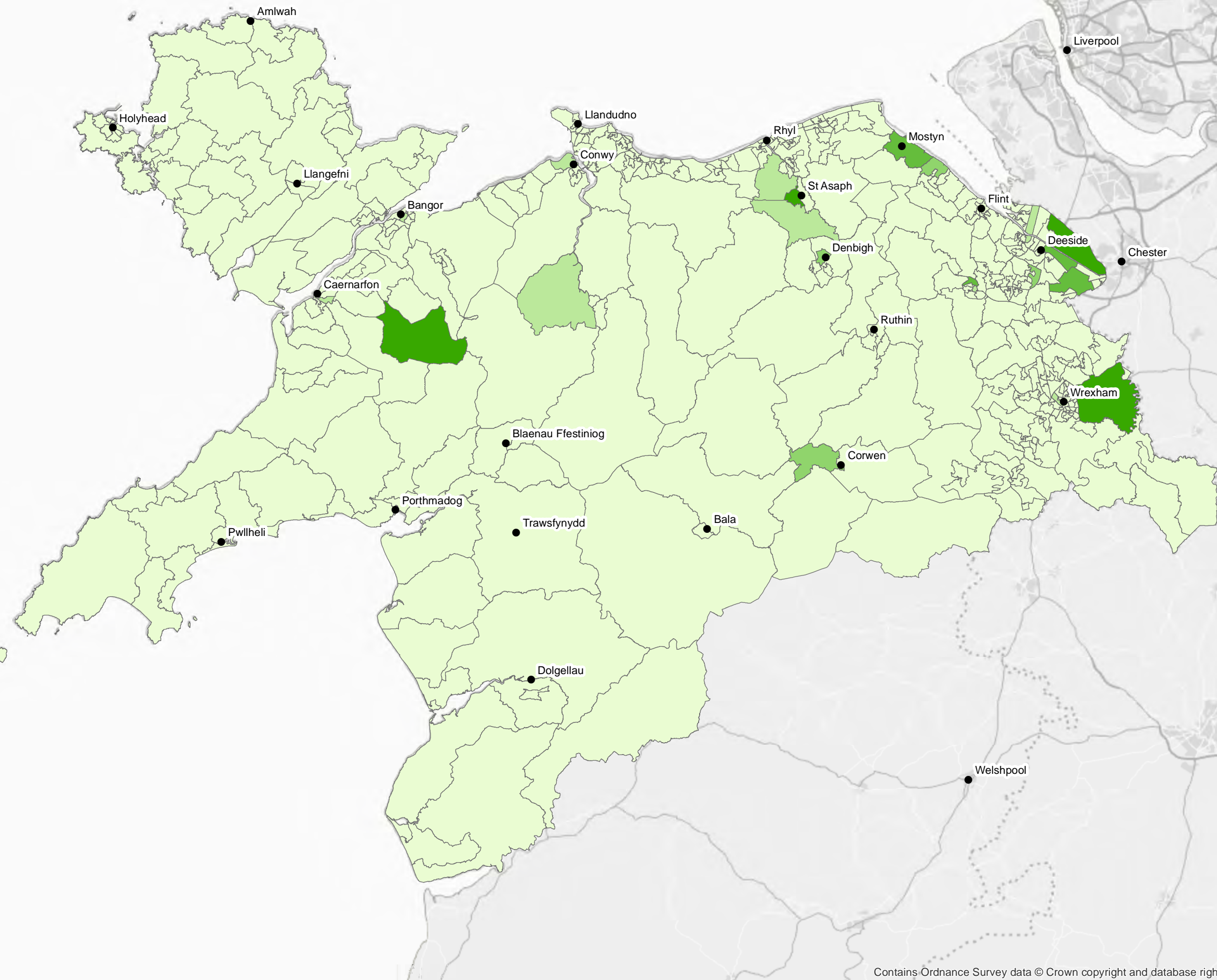
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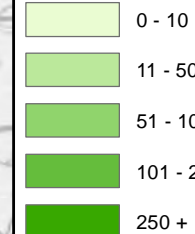
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Legend

Life Sciences

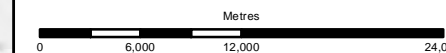
Number of Employees



● Key Settlements

P0	2014-01-27	EB	DB	DB
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Issue	Date	By	Chkd	Appd
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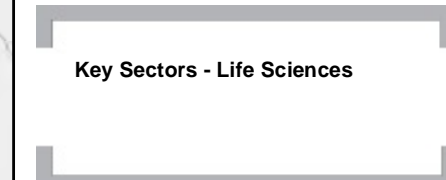
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Client

North Wales Planning Authorities

Job Title

Regional Employment Land Strategy for North



Scale at A3

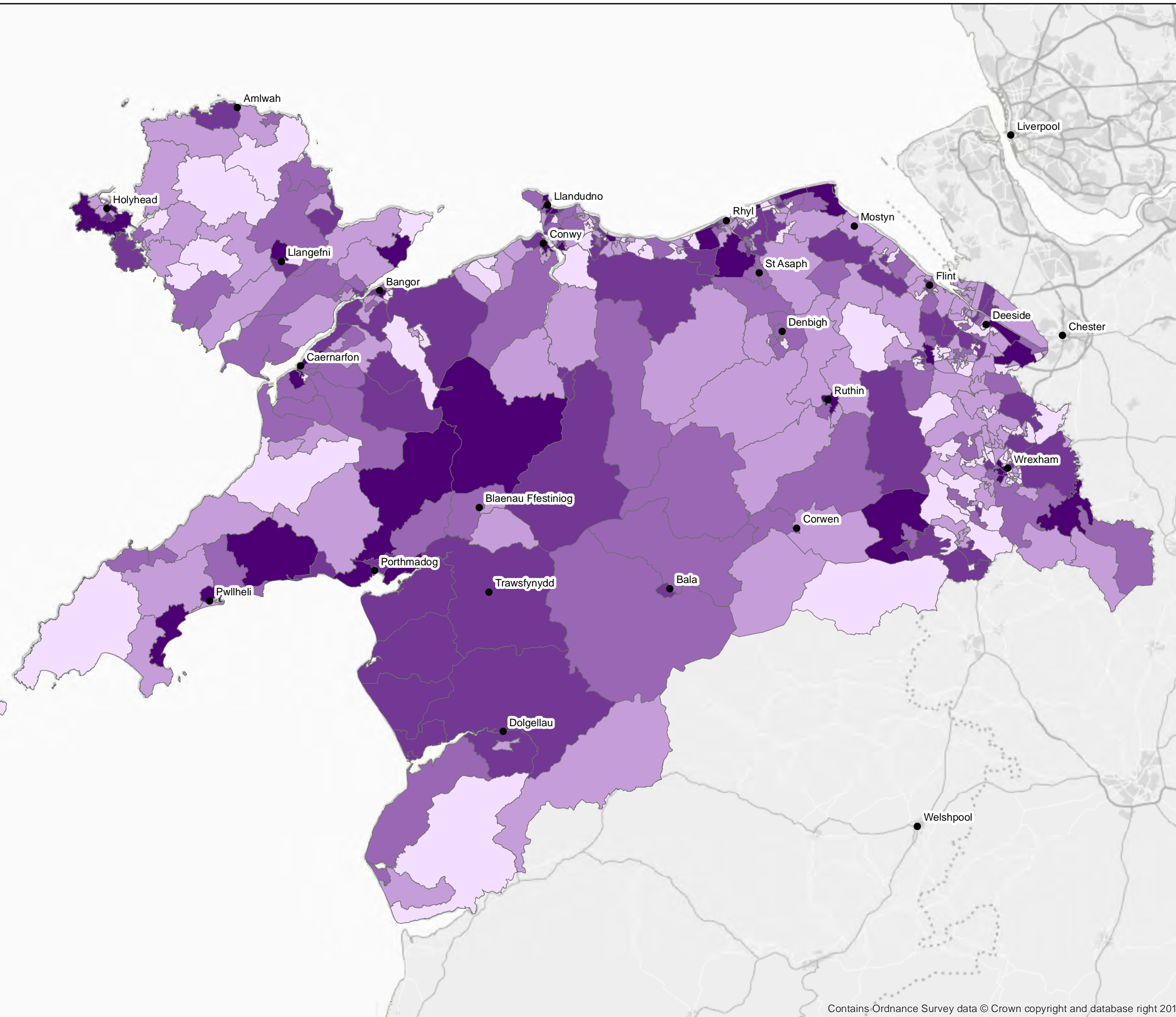
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Drawing Status
Preliminary

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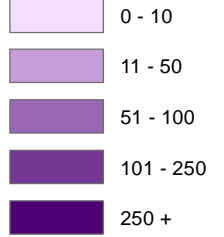
Issue
P0



Legend

Tourism

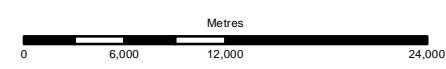
Number of Employees



● Key Settlements

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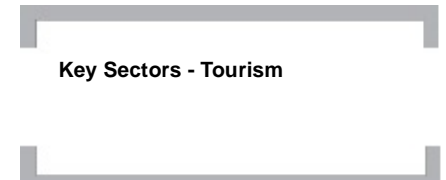
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ARUP

Client
North Wales Planning Authorities

Job Title
Regional Employment Land Strategy for North



Scale at A3
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Job No 233084-00	Drawing Status Preliminary
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Drawing No 025	Issue P0
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Appendix C

Experian Employment Forecasts

North Wales - Trends by Key Sector (2009-2031) (Thousands)

Key Sector	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Advanced materials & manufacturing	22.2	21.6	23.1	25.9	25.9	26.2	26.2	26.1	25.8	25.4	25.1	24.6	24.1	23.6	23.1	22.7	22.3	21.9	21.4	21.0	20.6	20.2	19.8
Construction	17.2	17.3	16.8	15.3	15.2	15.3	15.7	16.0	16.3	16.6	16.7	16.9	17.0	17.1	17.2	17.3	17.4	17.5	17.6	17.7	17.8	18.0	18.1
Creative Industries	5.7	5.9	5.6	5.7	5.9	6.1	6.2	6.3	6.3	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4
Energy and environment	23.0	23.8	23.7	22.2	22.3	22.5	22.8	23.1	23.4	23.6	23.7	23.7	23.7	23.7	23.7	23.7	23.8	23.8	23.8	23.9	23.9	24.0	24.1
Finance and Professional Services	18.3	19.3	18.7	18.6	19.5	20.0	20.3	20.5	20.7	20.7	20.8	20.7	20.7	20.6	20.5	20.5	20.4	20.4	20.4	20.4	20.4	20.4	20.4
Food and Farming	9.5	9.4	9.6	10.0	9.7	9.8	9.9	9.9	9.9	9.9	9.8	9.8	9.8	9.7	9.6	9.6	9.6	9.5	9.5	9.5	9.5	9.4	9.4
ICT	4.0	4.1	4.4	4.6	4.7	4.8	4.9	4.9	5.0	5.0	5.0	4.9	4.9	4.9	4.9	4.9	4.8	4.8	4.8	4.8	4.8	4.8	4.7
Life Sciences	3.3	3.9	3.8	4.4	4.5	4.5	4.5	4.5	4.4	4.4	4.3	4.2	4.1	4.0	3.9	3.9	3.8	3.8	3.7	3.7	3.6	3.6	3.5
Tourism	22.7	22.9	22.6	23.4	23.3	24.1	24.6	25.0	25.3	25.6	25.8	26.1	26.2	26.4	26.5	26.7	26.9	27.0	27.2	27.3	27.5	27.6	27.7

Source: Experian Economics and Arup (February 2014)

Appendix D

Site Pro-formas

North Wales Employment Land Strategy – Site Appraisal

Site Name: Bodelwydden Business Park	Site Description and Land Use: Regional Strategic Site with a focus on advanced manufacturing building on the existing investment in the Opto-electronics / photonics industry at St Asaph. The site is currently in agricultural use comprising both arable and pastoral grazing land. There are two farm complexes on the site.
Grid Ref: SJ 00893 75661	
Site Area (Ha): 104	
Developable Area (Ha): 26	
Approx. Rental Levels: £4 psf	

Site Constraints

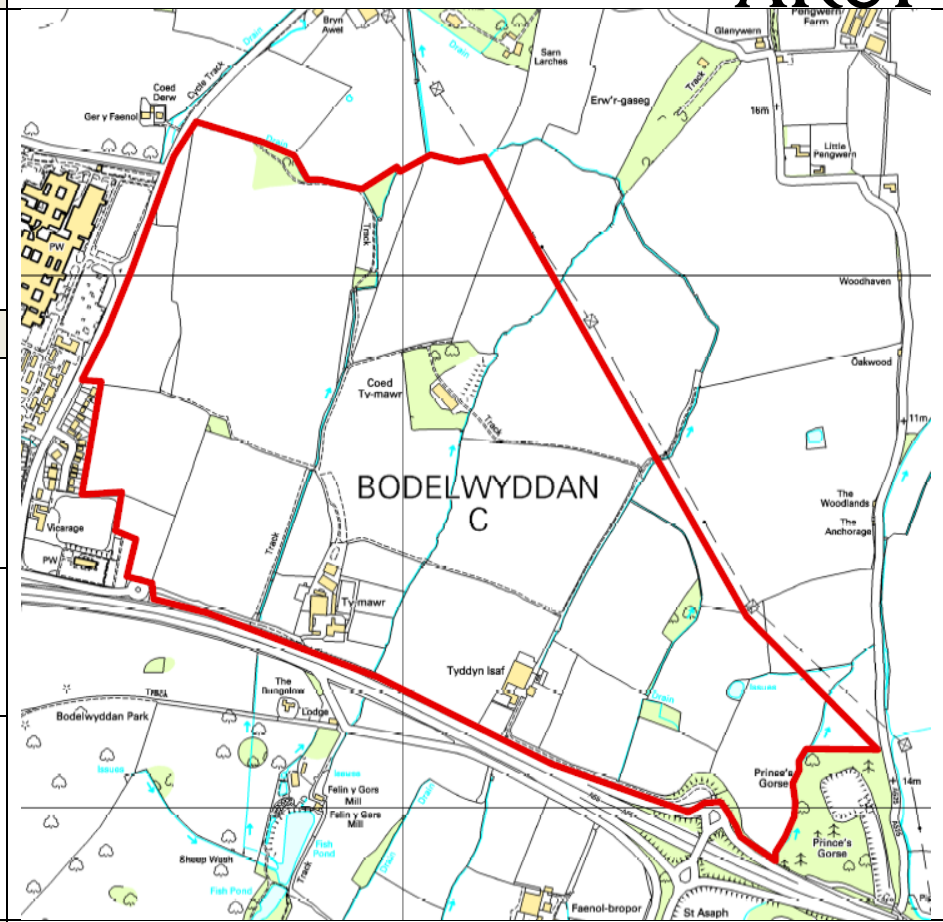
Environmental Constraints: Three watercourses flow through the site – little more than field ditches (very low flood risk – less than 0.1% pa)). Three wildlife sites within 2km of the site boundary.	Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.
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Adjoining Land Uses: Bodelwyddan Castle which lies in parkland to the south of the A55, is visible from the site.	Electricity (Scottish Power): Likely to depend on end use and will form part of the wider mixed use scheme.
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Other Constraints: Of the two farm complexes, one contains a Listed Building. A number of overhead power lines are present across the site.	Gas (Wales & West Utilities): There is no gas infrastructure in place on the site at present, but the nearest connections are close by to the north east. The nearby connections are low pressure.
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Site Characteristics

Highway Access: Junction 26 of the A55 lies to the immediate south east of the site and forms the main access to St Asaph Business Park.	Ownership: Unknown
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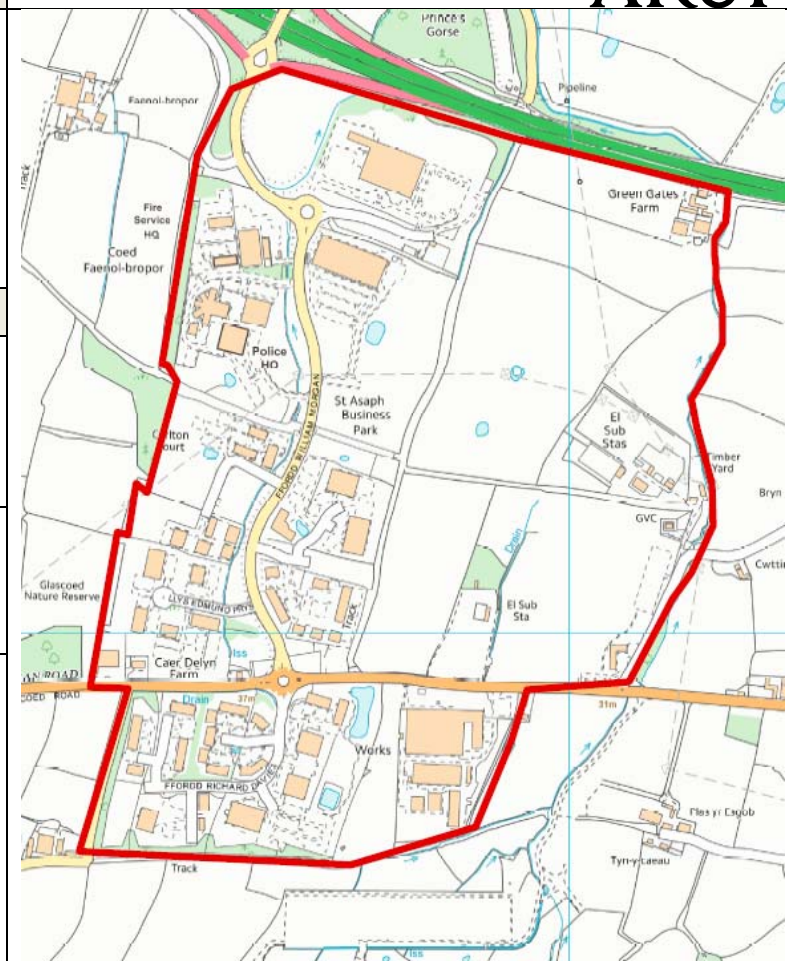


Infrastructure Requirements:

New highway network between existing A55 junction 26 and Sarn Road and new public transport links.

<p>Public Transport: The nearest train stations are Pensarn and Rhyl; neither of which are in close proximity. There are two bus stops nearby on St. Asaph Road and Abergele Road, both heading east.</p>	<p>Planning Status: Development Brief (First Draft) – 2004 Denbighshire Employment Land Study identified a total of 26ha to be distributed between Bodelwyddan and St Asaph.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic site offering a strategic inward investment location for a range of sectors (e.g. Manufacturing, Energy and Life Sciences).</p>
<p>Quality of Site Environment: The site has varying topography from the coastal plain to the low ridge to the east and north east of the site along which Nant y Faenol runs. These local features contain the site and provide capacity to absorb development.</p>		

North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: St Asaph Business Park</p> <p>Grid Ref: SJ 01764 74301</p> <p>Site Area (Ha): 87.1</p> <p>Developable Area (Ha): 14</p> <p>Approx. Rental Levels: £8 psf</p>	<p>Site Description and Land Use: An established business park located to the east of St Asaph. Sectors include photo-voltaics, manufacturing, energy, optoelectronics and creative sectors i.e. Smart Kem, Jane Lewis and North Wales Police. The specific focus on optoelectronics has been enhanced by the involvement of Glyndwr Optic Technium.</p>
<p>Site Constraints</p>	
<p>Environmental Constraints: There is a designated area of ancient woodland to the west of the business park and a listed building to the north west. The site is at low (0.1%-1% pa) risk of flooding from surface water.</p>	<p>Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.</p>
<p>Adjoining Land Uses: Low level fields to the south and west. The residential settlement of St Asaph lies to the east of the site.</p>	<p>Electricity (Scottish Power): Further development on this site should be possible, depending on demand from the end user.</p>
<p>Other Constraints: The site would benefit from improved links between the town and the business park both in terms of businesses working together and the infrastructure along Glascoed Road. To the west of the site lies Bodelwyddan, from which there are some significant views from listed buildings; these views extend to the east, towards St Asaph Business Park.</p>	<p>Gas (Wales & West Utilities): This site is well serviced and surrounded by an intermediate pressure gas pipe line. Works within 3m of the site will need to be investigated by an engineer.</p>
<p>Site Characteristics</p>	
<p>Highway Access: Primary access to the site is via the B5381. The north of the site can be accessed via the A55.</p>	<p>Ownership: Unknown</p>
<p>Infrastructure Requirements: The existing internal infrastructure is well maintained however there is a requirement for junction improvements from the A525.</p>	



<p>Public Transport: The site is isolated in terms of access to the rail network with the nearest train station at Pensarn. There are a number of bus stops around the site i.e. on Ffordd William Morgan and Glascoed Road.</p>	<p>Planning Status: This site is an existing employment site within the Denbighshire County Council UDP.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic site offering a strategic inward investment location for a range of sectors (e.g. Manufacturing, Energy and Life Sciences).</p>
<p>Quality of Site Environment: The topography of the site is relatively flat with necessary infrastructure in place. The site and associated landscaping is well maintained, with smart purpose built units within the site boundary.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Chester Aerospace Park/Hawarden Park

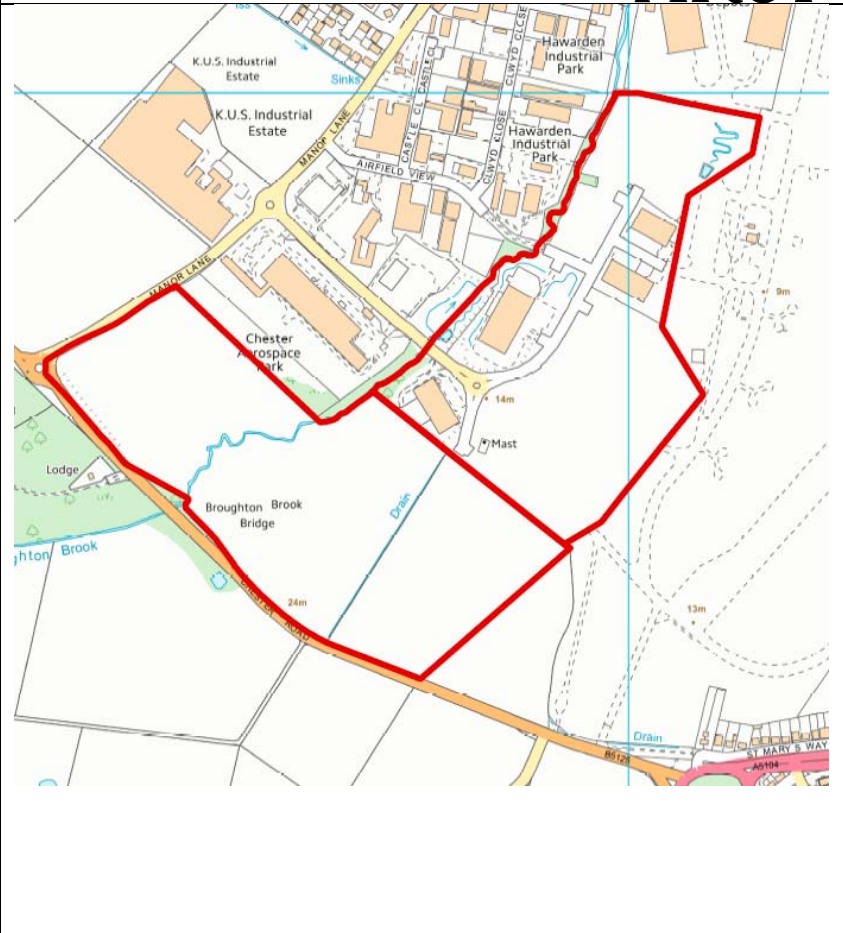
Grid Ref: SJ 33806 64498

Site Area (Ha): 33.7

Developable Area (Ha): 33.7

Approx. Rental Levels: Dependant on end use.

Site Description and Land Use: The site is currently a mixture of vacant, undeveloped land to the south and business use to the north east. The site is allocated for employment use in the Flintshire UDP. There is potential to market the site for aerospace/aviation activity.



Site Constraints

Environmental Constraints: There is a high chance (greater than 3.3% pa) of flooding from surface water on certain areas of the site. In addition to this, the Chester Aerospace allocation is at risk of flooding from rivers and sea; this ranges from low to high (0.1% - 3.3%+ pa).

Water / Sewerage (Welsh Water): Site within DEE Valley Area. DCWW could provide a mains water supply as close to boundary.

Adjoining Land Uses: Includes employment land to the east in the form of Broughton Industrial Estate, Hawarden Airport to the north east, fields to the north west and the residential settlement of Broughton to the south.

Electricity (Scottish Power): Dependant on end user.

Other Constraints: There are two listed buildings to the north east of the site; they are not within the site boundary.

Gas (Wales & West Utilities): There are currently no gas supply on the site or in the vicinity of the site. Costs to connect to the nearest network are likely to be high.

Site Characteristics

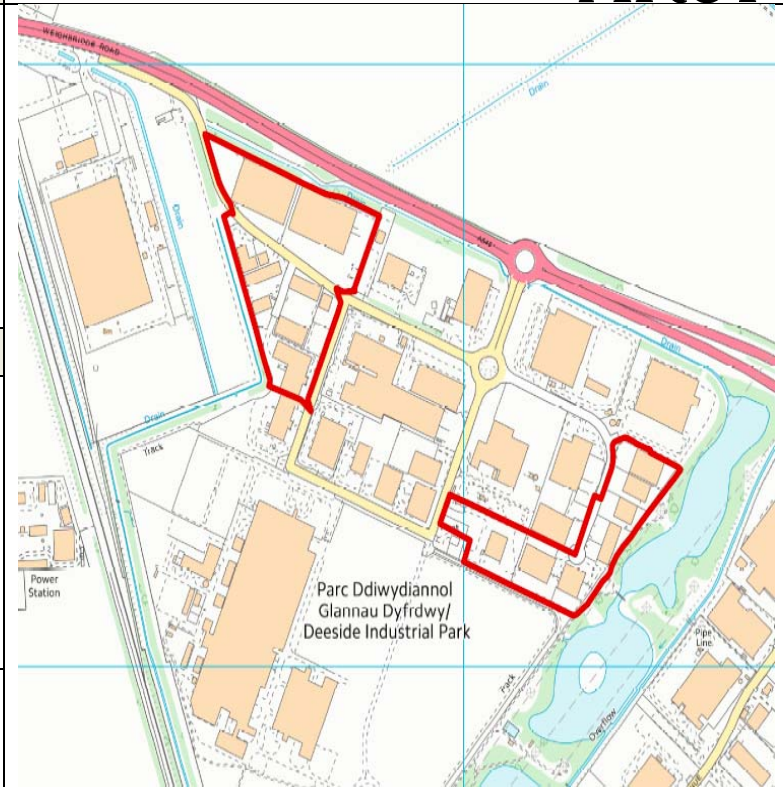
Highway Access: Direct access from Manor Lane onto Airfield View.

Ownership: Unknown.

Infrastructure Requirements: There is no internal infrastructure built on the Hawarden Business Park allocation and a large part of the Chester Aerospace allocation.

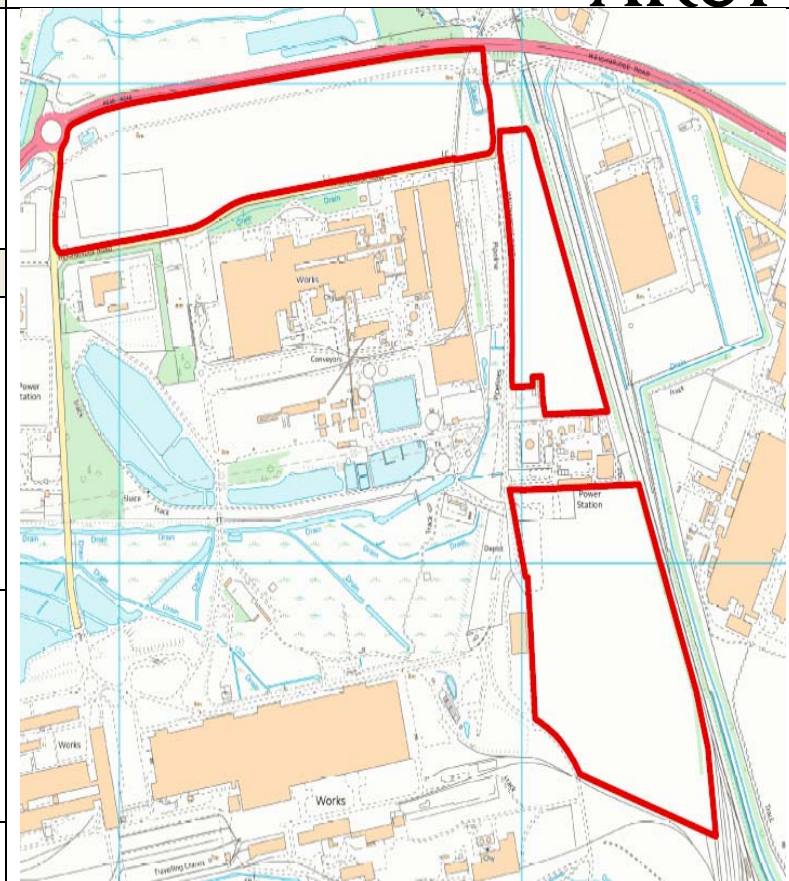
<p>Public Transport: Nearest train station is nearby in the settlement of Hawarden. The site is well served by buses with stops on Manor Lane with hourly connections to Chester, Mold and the train station.</p>	<p>Planning Status: Allocated for employment in the Flintshire UDP – 200-2015.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic site with a focus on developing investment in the Advanced Manufacturing sector, specifically the aerospace sub-sector and associated supply chain.</p>
<p>Quality of Site Environment: To the south west the site is vacant, undeveloped fields with hedgerows. To the north east of the sites lies Chester Aerospace Park which has a number of large purpose-built commercial units i.e. ALcontrol Laboratories. The internal infrastructure is in good condition. A large proportion of the site is rank grassland and low level.</p>		

North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: Deeside Industrial Park</p> <p>Grid Ref: SJ 31929 71448</p> <p>Site Area (Ha): 11.6</p> <p>Developable Area (Ha): 11.6</p> <p>Approx. Rental Levels: £4 psf</p>	<p>Site Description and Land Use: The Deeside Industrial Park is split up into a number of zones and forms one of the North West’s most prominent business locations. The whole industrial area extends to 2,000 acres. The park attracts industries such as food production, aerospace, pharmaceuticals, paper, packaging and engineering. In terms of location, the site is in a predominantly rural area with residential settlements to the south.</p>
Site Constraints	
<p>Environmental Constraints: To the north west of the site are a number of environmental designations including a SAC, SSSI, Ramsar and SPA - RSPB Burton Mere Wetlands. To the south east of the site lie three listed buildings, however they are not within the site boundary. In terms of sea/river flooding, areas of the site vary between low (0.1%-1% pa) and high (3.3%+) risk.</p>	<p>Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.</p>
<p>Adjoining Land Uses: Surrounding uses include employment/industrial to the west i.e. Shotton Paper. To the north are low level fields and to the east and south lie the settlements of Saughall, Garden City and Shotton.</p>	<p>Electricity (Scottish Power): Dependant on end y user demands.</p>
<p>Other Constraints: There is a watercourse running down the south west boundary of the site. There are also a number of large lakes to the south east of the site.</p>	<p>Gas (Wales & West Utilities): There is a medium pressure pipe line servicing parts of the site at present. Works within 3m of this area would need to be inspected by an engineer.</p>
Site Characteristics	
<p>Highway Access: Main access is off the A494/A550 to the north of the site onto Shotwick Road.</p>	<p>Ownership: Unknown</p>
<p>Infrastructure Requirements: This is a well-established business park with good rail links and internal infrastructure. The site is also in relatively close proximity to Ellesmere Port to the north east. Site requires investment in broadband, utilities and access. This links</p>	



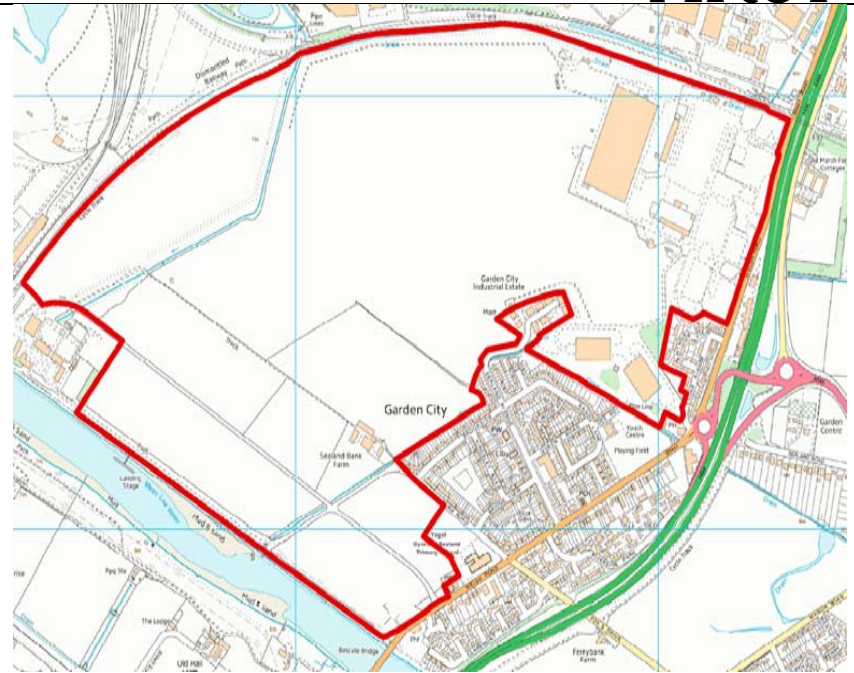
		<p>particularly to improvements that will provide alternatives to using the car.</p> <p>The site is also experiencing a shortage of quality premises.</p>
<p>Public Transport: Hawarden Bridge train station is in relatively close proximity to the south of the site. The closest bus stop is on Tenth Avenue to the south of the site providing connections to Mold (hourly) and Ellesmere Port Bus Station (hourly).</p>	<p>Planning Status: Designated as part of the Deeside Enterprise Zone which offers strong links to training and development.</p>	<p>Summary – Role / Function (incl. Sector Drivers): The focus for the area should be to maintain its regional importance, further embedding existing investors and attracting new investment through promotion of sites and supply chain opportunities.</p> <p>Infrastructure works may delay availability of this site until later in the strategy period.</p>
<p>Quality of Site Environment: The area is rich in diverse habitats and biodiversity hence its environmental designations.</p>		

North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: Land to North East of Shotton Paper</p> <p>Grid Ref: SJ 31006 71473</p> <p>Site Area (Ha): 60</p> <p>Developable Area (Ha): 60</p> <p>Approx. Rental Levels: Dependent on end use.</p>	<p>Site Description and Land Use: The land is currently vacant, relatively high gradient grassland set within an allocated employment site.</p>
<p>Site Constraints</p>	
<p>Environmental Constraints: There are a number of environmental constraints in this area including nearby land to the west designated as a Ramsar, SSSI, SAC; this is not however within the site boundary. The site is bordered to the west by areas with a high susceptibility (3.3%+ pa) to flooding from rivers and sea. Certain areas within the site boundary are at low risk (between 0.1%-1% pa) of flooding from surface water.</p>	<p>Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.</p>
<p>Adjoining Land Uses: Deeside Industrial Park lies to the east of the site, with Shotton Paper immediately to the west. To the north lie the small residential settlements of Burton and Puddington. Between the north and south ends of the site there is an energy plant which is not within this employment allocation.</p>	<p>Electricity (Scottish Power): Dependant on end user.</p>
<p>Other Constraints: There is also a lake in close proximity used by the Shotton Sailing Club. In addition to this, there is a large pylon on the site which may obstruct development.</p>	<p>Gas (Wales & West Utilities): There are no pipe lines servicing the south of the site, however the edge of the north could have access to an intermediate pressure pipe line.</p>
<p>Site Characteristics</p>	
<p>Highway Access: The site is close to the A548 but investment in highway infrastructure would need to take place.</p>	<p>Ownership: Unknown</p>
<p>Infrastructure Requirements: As the land is vacant full internal infrastructure will be necessary.</p>	



<p>Public Transport: The closest train station is to the south of the site – Hawarden Bridge Train Station. Bus connections are provided at Great Bear Distribution; this service is to the north of the site and connects (infrequently) to Tesco (Broughton) and Leasowe, Ross Avenue.</p>	<p>Planning Status: Within the Flintshire UDP, the site has been retained as an allocation.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic site with a focus on the energy sector. Alternatively provides expansion potential for Shotton Paper.</p>
<p>Quality of Site Environment: The land to the north is moderately raised, rank grassland. There is an abundance of vegetation covering the site which may require further investigation.</p>		

North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: Land to North West of Garden City (Northern Gateway)</p>	<p>Site Description and Land Use: The land is currently vacant, low level grassland. The site is the largest of the site allocations and form part of a new missed use development. The Flintshire UDP notes that the site is close to main communications links and should be developed to a high standard.</p>
<p>Grid Ref: SJ 32035 69674</p>	
<p>Site Area (Ha): 98</p>	
<p>Developable Area (Ha): 98</p>	
<p>Approx. Rental Levels: Dependent on end use.</p>	
Site Constraints	
<p>Environmental Constraints: To the south west of the city lies a long section of land designated as an SSI and SAC. There are also two listed buildings close by on Garden City. The entire site is at low risk (between 0.1% - 1% pa) of flooding from rivers and sea.</p>	<p>Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.</p>
<p>Adjoining Land Uses: To the north is a large employment site – Deeside Industrial Park; to the south lies the residential areas of Shotton and Garden City.</p>	<p>Electricity (Scottish Power): Dependant on end user requirements.</p>
<p>Other Constraints: As the site is vacant, full internal infrastructure will be necessary.</p>	<p>Gas (Wales & West Utilities): As the site is vacant, there is currently no gas infrastructure serving the site. There are low pressure pipe lines supplying the residential area to the south east.</p>
Site Characteristics	
<p>Highway Access: Access to the site is constrained; although in close proximity to the A494 works would need to be carried out to widen the existing infrastructure to the north of the site which does not connect with the A494 at any point nearby.</p>	<p>Ownership: Private Ownership</p>
	<p>Infrastructure Requirements: Within the Flintshire UDP, it has been noted that the site requires major infrastructure. Flood alleviation scheme recently completed by Welsh Government.</p>



<p>Public Transport: Hawarden Bridge train station lies to the west of the site in close proximity. There are a number of bus stops along Welsh Road providing frequent (every 20 minutes) services to Chester Bus Exchange and Ellesmere Port (hourly).</p>	<p>Planning Status: Within the Flintshire UDP, the land has been retained as an existing allocation, but as part of a mixed use scheme under HSG2A.</p> <p>Extant planning consents for two areas of the site at outline stage.</p>	<p>Summary – Role / Function (incl. Sector Drivers):</p> <p>Regional Strategic Site with extant consent for mixed use development including a large area of B use class employment.</p> <p>The site will provide a significant amount of employment land when compared to forecasts and therefore should be prioritised in the short term.</p>
<p>Quality of Site Environment: The site is currently vacant so information on this is limited.</p>		

<p>North Wales Employment Land Strategy – Site Appraisal</p>		
<p>Site Name: Llay Industrial Estate</p>	<p>Site Description and Land Use: Existing industrial estate with a focus on supporting and encouraging indigenous growth while working with existing occupiers to ensure that the site meets their requirements moving forward.</p>	
<p>Grid Ref: SJ 32469 56579</p>		
<p>Site Area (Ha): 102</p>		
<p>Developable Area (Ha): 40</p>		
<p>Approx. Rental Levels: £4 psf</p>		
<p>Site Constraints</p>		
<p>Environmental Constraints: There is a listed building in close proximity to the north of the site but no known environmental designations. There is a risk of flooding from surface water ranging from very low (0.1% pa) to high (3.3%+ pa).</p>	<p>Water / Sewerage (Welsh Water): Site lies within the DEE Valley area.</p>	
<p>Adjoining Land Uses: Relatively built up industrial estate with a reservoir to the north east and the town of Llay to the south. Immediately adjacent to the site is open countryside with a country park to the south. There are also a small number of properties to the east.</p>	<p>Electricity (Scottish Power): Dependant on demands of end users.</p>	
<p>Other Constraints: The LFRA identified flooding issues, mainly surface water with some sewerage flooding of local significance.</p>	<p>Gas (Wales & West Utilities): There is existing gas infrastructure in place around the site, in the form of a medium pressure gas pipe line. Works within 3m of this site would need to be inspected by an engineer. The pipeline follows Miners Road.</p>	
<p>Site Characteristics</p>		<p>Infrastructure Requirements: Existing internal infrastructure which may need to be altered depending on future layout of industrial estate. Surface water flooding alleviation.</p>
<p>Highway Access: Primary access is from the B5373 onto either Davy Way or Miners Road.</p>	<p>Ownership: Unknown</p>	
<p>Public Transport: The PC1 service runs from</p>	<p>Planning Status: According to the</p>	
<p>Summary – Role / Function (incl. Sector Drivers):</p>		

<p>Southsea to Llay Industrial Estate and the PC2 runs from Gatewen to the site. This service operates only in the morning and late afternoon to accommodate workers. The closest train station is Cefn-Y-Bedd to the east.</p>	<p>Cheshire West and Chester Council Employment Land Study Update 2012, the site is a key employment area in Wrexham.</p>	<p>Sub-regional site offering a mix of both regional and local employment space. Site recently lost some large scale investment and therefore may require regeneration and upgrade.</p>
<p>Quality of Site Environment: On-site buildings are of a sufficient standard; however the existing infrastructure will need to be improved in order to accommodate expansion.</p>		

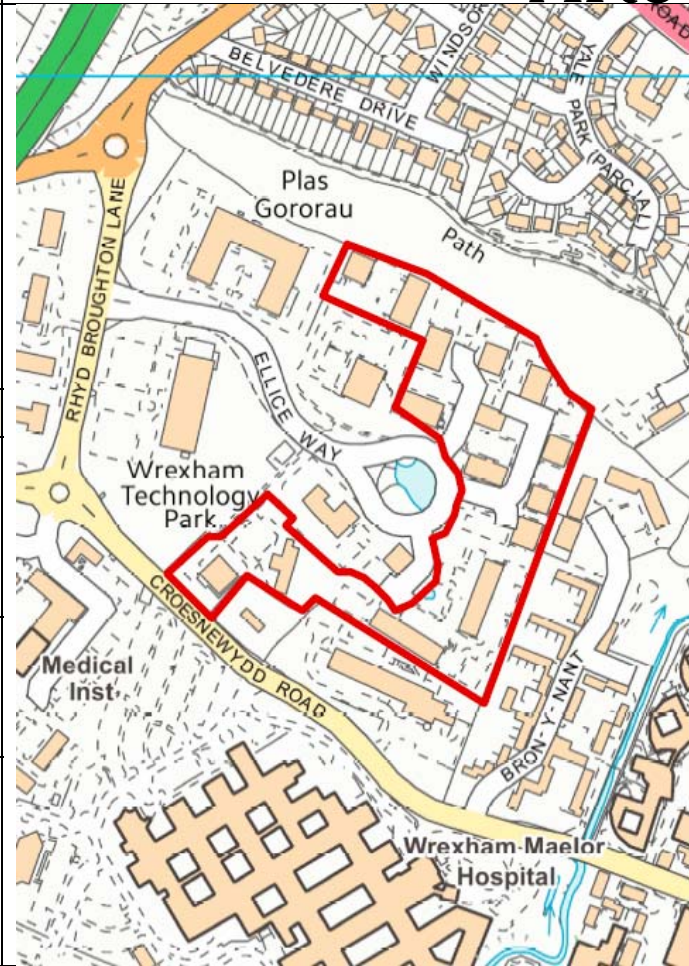
North Wales Employment Land Strategy – Site Appraisal		
<p>Site Name: Wrexham Industrial Estate</p> <p>Grid Ref: SJ 38172 50019</p> <p>Site Area (Ha): 491.7</p> <p>Developable Area (Ha): 77.1</p> <p>Approx. Rental Levels: £4 psf</p>		
<p>Site Description and Land Use: This site is an established industrial estate which acts as a strategic employment centre within the region. There are opportunities on the site to rationalise and reorganise the land.</p>		
Site Constraints		
<p>Environmental Constraints: There are a number of protected species and habitats on various plots within the estate. There are also a number of listed buildings in close proximity, on the periphery of the site. Erlas Black Wood lies to the north west of the site; this is designated ancient woodland. The Estate also contains an important network of wildlife habitats that supports a diverse range of animals and plants. There are three reservoirs to the south of the site that could have an impact upon flooding but this is very unlikely.</p>		<p>Water / Sewerage (Welsh Water): Site lies within DEE Valley Area. Current supply to site.</p>
<p>Adjoining Land Uses: The site is situated within a cluster of employment uses including Wrexham Enterprise Park and Redwither Business Park. The small residential settlement of Hugmore lies to the north of the site, with Wrexham to the west.</p>		<p>Electricity (Scottish Power): Dependant on end user.</p>
<p>Other Constraints: The LFRA identified flooding issues, mainly surface water with some sewerage flooding of local significance. The Pentre Maelor housing estate lies within the development boundary of the Wrexham Industrial Estate and residents often suffer harm to their quality of life through the detrimental impact of traffic, operational noise etc. associated with industry.</p>	<p>Gas (Wales & West Utilities): This site is well served by gas infrastructure with a medium pressure pipe line running down Abbey Road. Works within 3m of this area will need to be inspected by an engineer.</p>	

Site Characteristics		Infrastructure Requirements: Secure new link road into the Estate. Improve bus service to estates with greater frequency and increased number of stops.
Highway Access: The main access is off the A534, onto Industrial Estate Road.	Ownership: Welsh Government	
Public Transport: The site is served by a number of bus routes including the number 13 and C56 to Wrexham and Holt. The closest train station is in relatively close proximity in Wrexham.	Planning Status: Land at Clywedog Road (East), Wrexham Industrial Estate will be Safe-guarded as a landscape buffer zone to remain free of built development. Also, sufficient land will be allocated for employment development between 2001 and 2011. Land is allocated in the UDP at Owens Corning Fibreglass, Wrexham Industrial Estate for a major single user employment project that requires a site of over 30 hectares	Summary – Role / Function (incl. Sector Drivers): Regional Strategic site in need of rationalisation and regeneration. The site is changing with the recent announcement of the prison. Consideration should be given to the strategic future of the site prior to any upgrades.
Quality of Site Environment: High quality employment environment and very large site.		

North Wales Employment Land Strategy – Site Appraisal		
Site Name: Ruthin Road Grid Ref: SJ 31565 50424 Site Area (Ha): 15 Developable Area (Ha): 15 Approx. Rental Levels: Dependant on end use.	Site Description and Land Use: The land allocation means that the site is to be used for high quality employment development comprising high technology, manufacturing, research and development and prestige offices. Development will be restricted to B1 use. The policy goes on to state that forthcoming development will be low density, with buildings and hard surfaced areas of high quality design and materials set within an attractive natural and designed landscaped setting.	
Site Constraints		
Environmental Constraints: Limited constraints given context. Watercourse through the site.	Water / Sewerage (Welsh Water): Site within the DEE Valley Area. Connection should be possible given surrounding infrastructure.	
Adjoining Land Uses: Wrexham technology park and Wrexham Hospital. Areas of residential development.	Electricity (Scottish Power): Dependant on end use.	
Other Constraints: None identified.	Gas (Wales & West Utilities): To the south west of the site, there is a medium pressure gas pipe line which could be utilised to service the site. Works within 3m of this area will need to be inspected by an engineer.	
Site Characteristics		Infrastructure Requirements: Junction improvements from A525. Bridge improvements/replacement between development site and existing technology park (River Gwenfro).
Highway Access:	Ownership: Unknown	
Public Transport: There are a number of bus stops along Ruthin Road that provide regular	Planning Status: Land will be safeguarded on site for a primary school on 4.5 ha within the housing portion of the Ruthin Road	
		Summary – Role / Function (incl. Sector Drivers): Regional Strategic Site offering potential for high quality investment

<p>services to Wrexham Bus Station and Ruabon.</p>	<p>development area. The UDP also allocates land at Ruthin Road for housing and employment use. Policy E2 applies meaning that land is allocated for high quality employment.</p>	<p>alongside the Wrexham Technology park. Strategic location makes site attractive to a range of sectors.</p>
<p>Quality of Site Environment: High quality site potential.</p>		

North Wales Employment Land Strategy – Site Appraisal	
Site Name: Wrexham Technology Park	<p>Site Description and Land Use: The site is in a built up area to the north east of Wrexham. The land allocation means that the site is to be used for high quality employment development comprising high technology, manufacturing, research and development and prestige offices. Development will be restricted to B1 use. The policy goes on to state that forthcoming development will be low density, with buildings and hard surfaced areas of high quality design and materials set within an attractive natural and designed landscaped setting.</p>
Grid Ref: SJ 32128 50565	
Sub-Area: North East Wales/West Cheshire	
Site Area (Ha):	
Developable Area (Ha): 11.5	
Approx. Rental Levels: £8-11 psf	
Site Constraints	
Environmental Constraints: Limited – current employment site. Watercourse runs nearby.	<p>Water / Sewerage (Welsh Water): Site within the DEE Valley area. Connections and supply should be possible given existing infrastructure in the area.</p>
Adjoining Land Uses: Neighbouring land uses include further employment land including Wrexham Maelor Hospital to the south. To the north lies a large residential estate.	<p>Electricity (Scottish Power): Dependant on end use.</p>
Other Constraints: None identified.	<p>Gas (Wales & West Utilities): This site is very well serviced by low pressure pipe lines in various locations around the site. Works within 3m of the site will need to be inspected by an engineer.</p>
Site Characteristics	
Highway Access: Primary access to the site is via watery Road. Access from the A525 is limited.	<p>Ownership: Unknown</p>
	<p>Infrastructure Requirements: Junction improvements from A525. Bridge improvements/replacement between development site and existing technology park (River Gwenfro).</p>



<p>Public Transport: The site is well served by public transport with two train stations to the east – Wrexham General and Wrexham Central.</p>	<p>Planning Status: The UDP allocates 5.3 ha of land at Wrexham Technology Park for employment use. Policy E2 applies, meaning that land is allocated for high quality employment.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic Site offering potential for high quality investment alongside the Wrexham Technology park. Strategic location makes site attractive to a range of sectors.</p>
<p>Quality of Site Environment: High quality site environment.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Warren Hall
Grid Ref: SJ 32612 62611
Site Area (Ha): 36.5
Developable Area (Ha): 36.5
Approx. Rental Levels: Dependant on end development and end users.

Site Description and Land Use: Sites deemed as ‘high quality’ are principally aimed at attracting firms in the ‘high technology’, research and development sectors or prestige offices (B1 uses) which require a high quality environment.

Site Constraints

Environmental Constraints: The north boundary of the site has a row of trees/hedgerows which is likely to be disrupted if development is not sympathetic.

Water / Sewerage (Welsh Water):
 Within DEE Valley Area – supply should be achievable.

Adjoining Land Uses: The site is surrounded by low level fields.

Electricity (Scottish Power):
 Dependant on end user requirements.

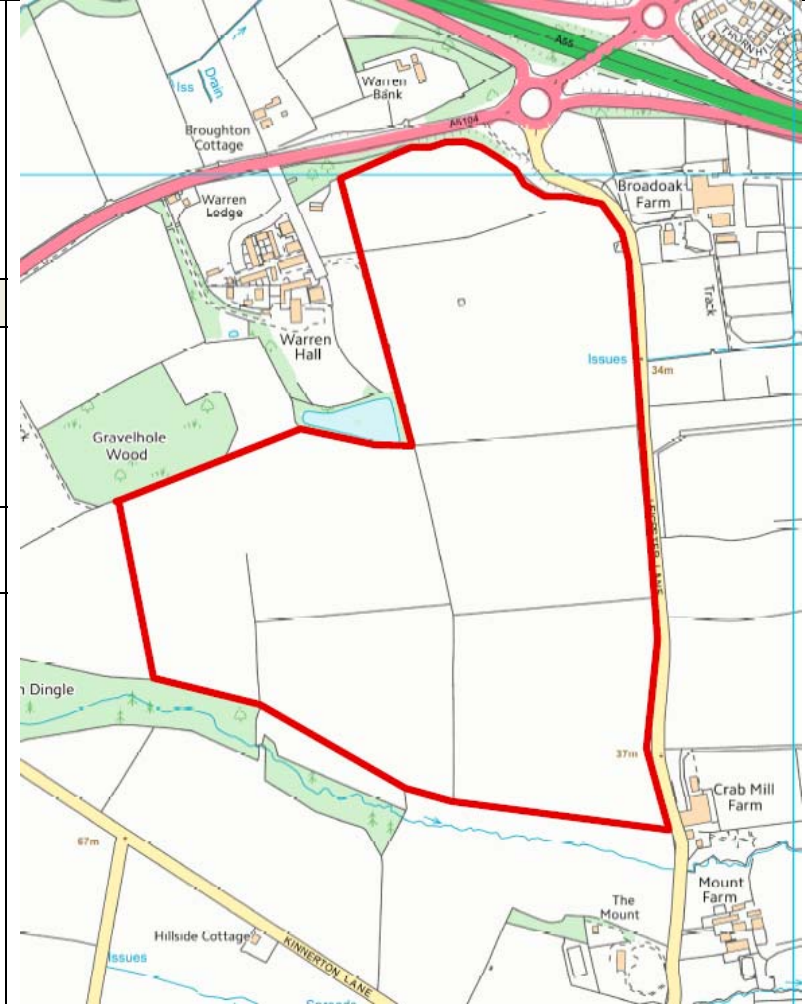
Other Constraints:
 None identified.

Gas (Wales & West Utilities): This site is very isolated in terms of gas infrastructure. There is no provision nearby therefore implementation of a network will be costly.

Site Characteristics

Highway Access: Situated close to the A55, direct access of the A5104.

Ownership: Unknown



Infrastructure Requirements:

Infrastructure works undertaken by Welsh Government. Internal infrastructure and ground works required.

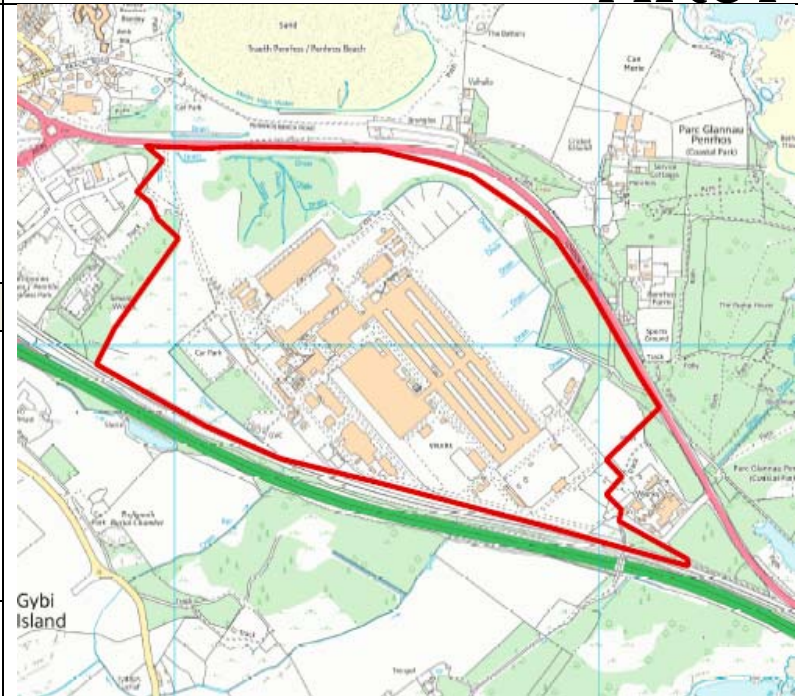
<p>Public Transport: The closest train station is at Little Mountain to the east of Buckley.</p>	<p>Planning Status: In the Adopted Flintshire Unitary Development Plan Warren Hall is allocated as a high quality employment site – see policy EM2. The site is safeguarded for B1 use.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Reserve site identified as offering potential for expansion to aerospace activities at Broughton and/or high quality development within other sectors.</p>
<p>Quality of Site Environment: The site has a high proportion of vacant hard-standing and scrubland. There are trees/hedgerows located sporadically on the site. In terms of topography the site is relatively flat.</p>		

North Wales Employment Land Strategy – Site Appraisal	
Site Name: Mostyn Docks	Site Description and Land Use: As part of the Adopted Flintshire Unitary Development Plan, Mostyn docks forms part of the Port Development Zone. This site has a focus on the renewable energy industry and a continued role in the development and deployment of off-shore components for the wind energy industry.
Grid Ref: SJ 16290 80350	
Site Area (Ha): 4.8	
Developable Area (Ha): 4.8	
Approx. Rental Levels: £3 psf	
Site Constraints	
Environmental Constraints: To the south west of the docks lies a number of areas designated as ancient woodland – this area is Mostyn Park. The area surrounding the docks to the north east is a designated Ramsar. There are also a number of listed buildings located on the site.	Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.
Adjoining Land Uses: To the north east of the site lies the coastline and to the south are a number of small residential settlements, open countryside and woodland.	Electricity (Scottish Power): Dependant on end use.
Other Constraints: In 2011, approval was given for Hazardous Substances Consent which may bring further contamination issues.	Gas (Wales & West Utilities): There is no current infrastructure provision on the site. To the north west is a nearby intermediate pressure gas pipe. Works within 3m of this area would need to be investigated by engineers.
Site Characteristics	
Highway Access: The A548 runs through Mostyn and provides access to the dock area.	Ownership: Unknown
Infrastructure Requirements: The land is currently vacant so would require full clearance and construction of internal infrastructure.	



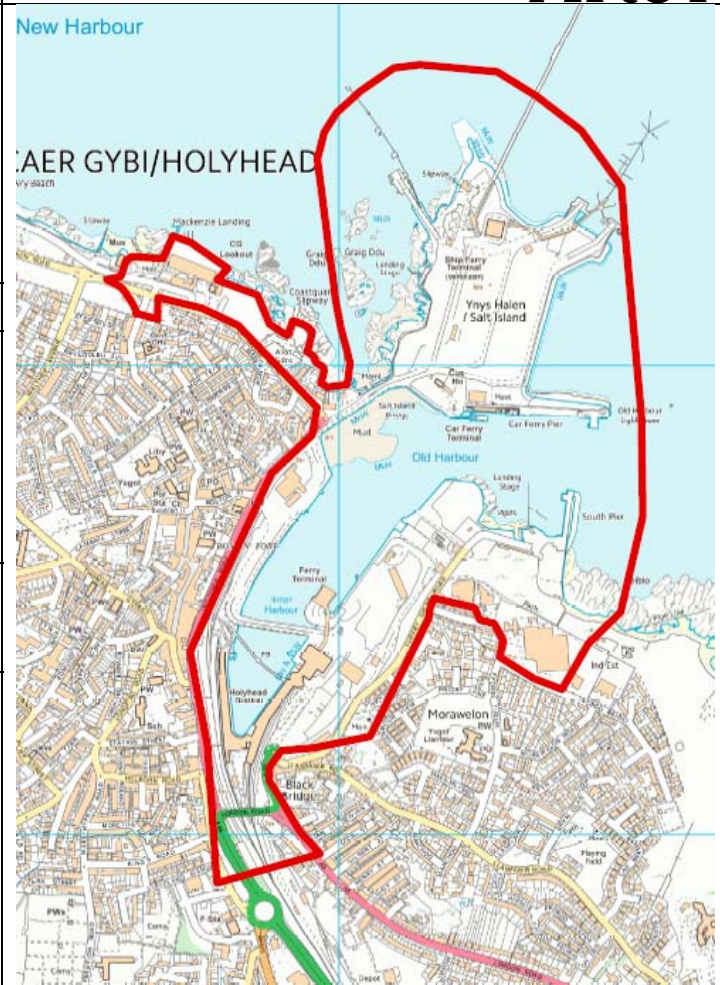
<p>Public Transport: The closest train station is a considerable distance away to the north east in Prestatyn. There are a number of bus stops nearby that run frequently connecting the area to Holywell Bus Station.</p>	<p>Planning Status: Allocated - Mostyn Docks forms part of the Port Development Zone in recognition of the growing strategic importance of the area as a sea/rail/road corridor.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional logistics/ distribution hub reliant on a long term user to develop the site further.</p>
<p>Quality of Site Environment: Limited information as the site is currently vacant.</p>		

North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: Anglesey Aluminium</p> <p>Grid Ref: SH 26582 80966</p> <p>Site Area (Ha): 92</p> <p>Developable Area (Ha): 54</p> <p>Approx. Rental Levels: Dependant on end users.</p>	<p>Site Description and Land Use: Current site buildings are in poor condition and no longer used. The site would be suitable for employment uses. Proposals already exist to develop a bio-mass plant on the site along with high-tech aquaponics centres.</p>
<p>Site Constraints</p>	
<p>Environmental Constraints: Approximately 50% to the north east of the site is currently designated as an AONB. There is also a cluster of listed buildings in Penrhos to the north east of the site, but none situated within the site boundary. There is also a low (0.1%-1% pa) chance of flooding from surface water.</p>	<p>Water / Sewerage (Welsh Water): A 200mm water main enters site at south-east corner. Existing inlet main and storage tank should be sufficient to provide domestic water for proposed development. A pressurised sewerage rising main crosses the north-west corner of the site which may restrict development density.</p>
<p>Adjoining Land Uses: Few surrounding employment uses. There is a cricket ground and a small number of properties to the north of the site. To the north west lies a larger residential settlement.</p>	<p>Electricity (Scottish Power): Site has existing 132kV line connection. Capacity would need to be assessed based on requirements of end users.</p>
<p>Other Constraints: It is possible that the site has remediation issues which would require further investigation. In addition, there are a number of buildings on the site which require demolition.</p>	<p>Gas (Wales & West Utilities): Currently there are no gas pipes within the site boundary. The nearest infrastructure for gas would be the low pressure connections at Penrhos Industrial Estate to the north west.</p>
<p>Site Characteristics</p>	
<p>Highway Access: Site is located 0.7 km from the A55 which provides direct highway access.</p>	<p>Ownership: Anglesey Aluminium Ltd.</p>
<p>Public Transport: Anglesey Aluminium is located 1.5 km from Holyhead train station. The</p>	<p>Planning Status: Site is allocated as part of the Isle of Anglesey Development Plan.</p>
<p>Infrastructure Requirements: Works required in order to make site useable given former use. Potential for contaminated land.</p>	
<p>Summary – Role / Function (incl. Sector Drivers): Anglesey Aluminium has a focus on energy generation, with permission already</p>	



<p>nearest bus station is on London Road and provides regular links to Holyhead, Summer Hill and Bangor bus station.</p>	<p>Planning permission was recently granted on the site for a 299MW renewable energy biomass power plant. There are also proposals to develop an Eco Park on the site including high-tech aquaponic centres.</p>	<p>acquired for a biomass plant. In addition the site had plans for an Eco Park and benefits from being designated as part of the Anglesey Enterprise Zone.</p>
<p>Quality of Site Environment: The buildings currently occupying the site are of an industrial nature and of poor quality. The site is fairly well hidden from the road due to a number of hedgerows. The majority of land immediately surrounding the site is low level grassland.</p>		

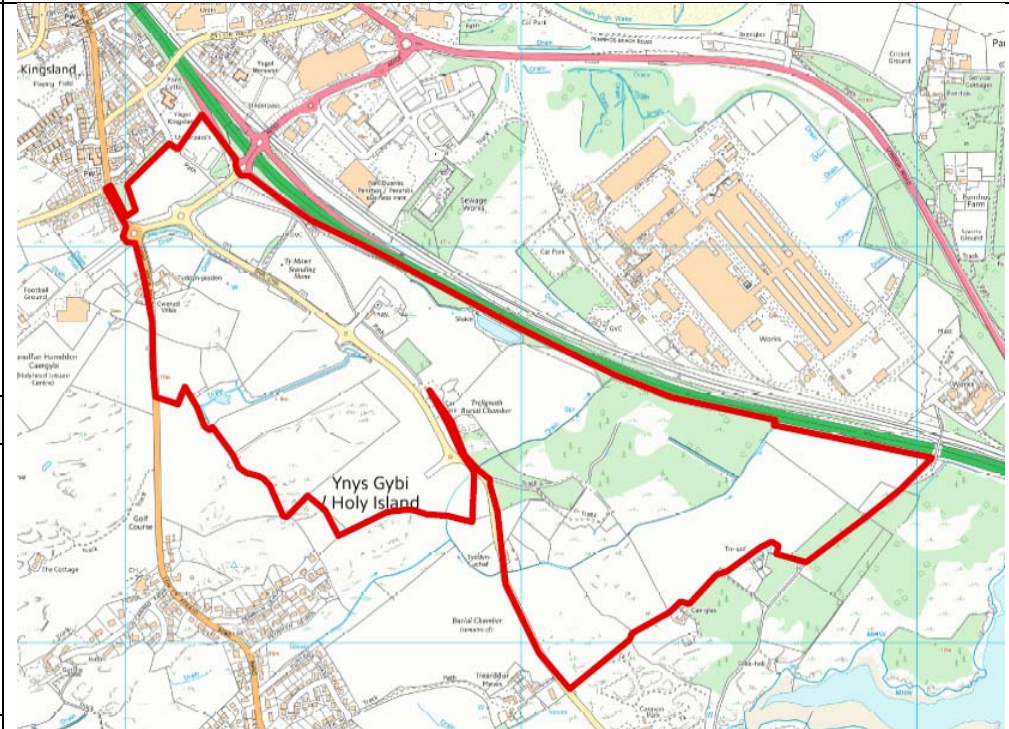
North Wales Employment Land Strategy – Site Appraisal	
<p>Site Name: Holyhead Port</p> <p>Grid Ref: SH 25090 82768</p> <p>Site Area (Ha): 98</p> <p>Developable Area (Ha): 10</p> <p>Approx. Rental Levels: Dependent on use.</p>	<p>Site Description and Land Use: There are significant opportunities for this site to contribute to the Energy Island objectives in terms of technology development and as a major supplier to the low carbon energy sector. In the long term the site presents opportunities in the marine renewable sector.</p>
<p>Site Constraints</p>	
<p>Environmental Constraints: Given the proximity of this site to the sea, it has a high chance of flooding from rivers and sea (3.3%+ pa). The site is also susceptible to flooding from surface water; this is considered a medium risk (between 1% and 3.3% pa). There is a SAM also in close proximity to the site.</p>	<p>Water / Sewerage (Welsh Water): Water network should be sufficient to provide water supply. Sewerage network is extensive but pumping stations may need capacity assessment. No problems in principle at Holyhead WWTW.</p>
<p>Adjoining Land Uses: To the east of the site the land is in residential use. There is employment use to the south.</p>	<p>Electricity (Scottish Power): Dependant on end use requirements.</p>
<p>Other Constraints: There is a significant area of the site that is owned by the port operator. There are two listed buildings to the south west of the site. In addition to this, there is an AONB to the south east of the site, in close proximity.</p>	<p>Gas (Wales & West Utilities): There is a low pressure pipeline to the east of the site on Turkey Shore Road. Although there is no infrastructure established on site, the network is in close proximity.</p>
<p>Site Characteristics</p>	
<p>Highway Access: The site is located at the end of the A55; however there are issues in the area regarding traffic congestion.</p>	<p>Ownership: Multiple including Stena Line Ports Ltd.</p>
<p>Infrastructure Requirements: Infrastructure to be progressed as part of current proposals.</p>	



<p>Public Transport: Holyhead train station is adjacent to the port and ferry terminal. There are good bus links in the area with stops at the port connecting the site to Llangefni, Bangor and Holyhead (every 15 minutes).</p>	<p>Planning Status: Allocated within the stopped UDP.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Site has extant consent for a mixed use development including a small element of business use. Likely to operate as a sub-regional site given overall scale.</p>
<p>Quality of Site Environment: There is well maintained and landscaped internal infrastructure already in place on site. The buildings are purpose built and of high quality.</p>		

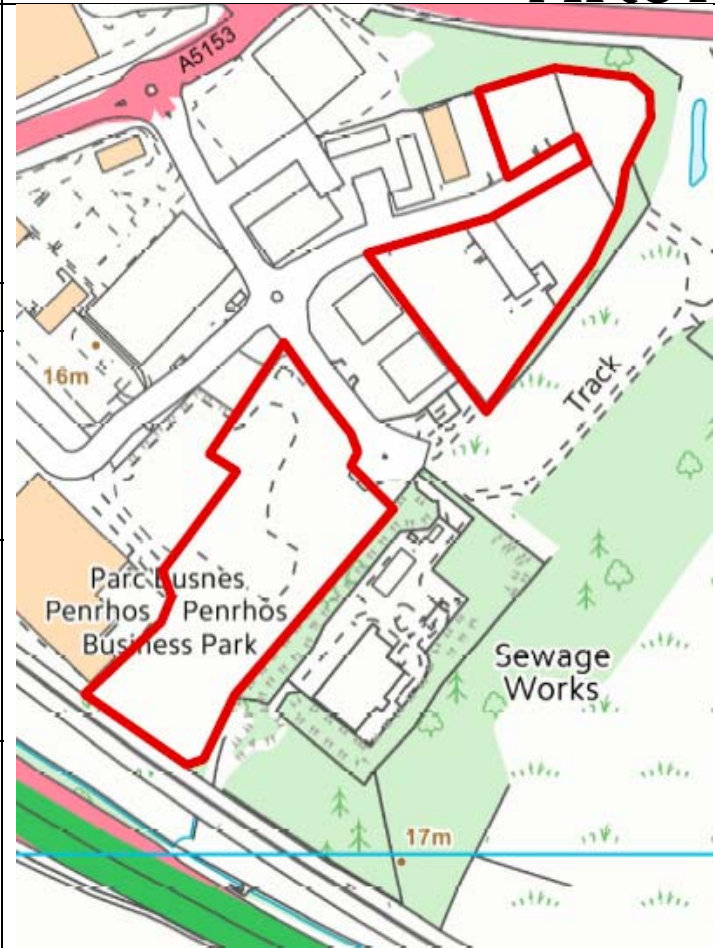
North Wales Employment Land Strategy – Site Appraisal

Site Name: Parc Cybi	Site Description and Land Use: Serviced development site with road infrastructure. Site could be used for a range of uses including B1, B2 and B8. The site is also in close proximity to the proposed new nuclear build at Wlyfa and Holyhead Port which could potentially provide demand for a range of energy uses and development to support energy projects.
Grid Ref: SH 25372 80918	
Site Area (Ha): 108	
Developable Area (Ha): 53	
Approx. Rental Levels: Dependant on end user.	
Site Constraints	
Environmental Constraints: There is a small patch of land within the site boundary which is at high risk (3.3%+ pa) from surface water flooding. This site is currently designated as an AONB, along with the majority of Holy Island.	Water / Sewerage (Welsh Water): Main water supply should be achievable. In principle no problem at Holyhead WWTW.
Adjoining Land Uses: The site is adjacent to surrounding employment uses.	Electricity (Scottish Power): Dependant on end user.
Other Constraints: There is also a Scheduled Ancient Monument within the site boundary. In addition to the above, Beddmanarch Cymyran SSSI is located to the south east of the site.	Gas (Wales & West Utilities): There is a medium pressure pipe line to the south west of the site and a high pressure connection to the north east. Depending on the end use of the site, the medium connection could be most appropriate.



Site Characteristics		Infrastructure Requirements:
<p>Highway Access: The site benefits from direct access off a major trunk road and is located within close proximity to Junction 2 of the A55.</p>	<p>Ownership: Site currently owned by Welsh Government but the go-ahead has been given for the sale of 3.6 ha to 'The Conygar Investment Company Plc'.</p>	<p>Main access infrastructure in place. Internal infrastructure required and will be progressed by end users.</p>
<p>Public Transport: The site offers proximity to some existing non-car alternatives and is located 2 km away from Holyhead Railway Station. The nearest bus stop is located on Kingsland Road and provides twice hourly links to Llangefni and Holyhead.</p>	<p>Planning Status: Conygar Investment Company PLC obtained outline planning consent for two developments in May 2010. The proposed development will be distribution and warehousing space. The site is allocated within the Ynys Mon Local Plan for employment use.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic site forming an important logistics and distribution role for the port of Holyhead, while also providing high quality office and distribution space. Potential role as an associated site for Wylfa Newydd.</p>
<p>Quality of Site Environment: The site benefits from established internal infrastructure which was constructed recently. This incorporates new roads, foul and surface water drainage systems along with utility supplies.</p>		

North Wales Employment Land Strategy – Site Appraisal	
Site Name: Penrhos Industrial Estate Grid Ref: SH 25715 81231 Site Area (Ha): 10 Developable Area (Ha): 3.5 Approx. Rental Levels: Dependant on end user and type of facility created.	Site Description and Land Use: The site is mostly vacant (85%) with some limited existing open storage. The estate could be used for B1, B2 and B8.
Site Constraints	
Environmental Constraints: A small portion of the site to the north east is designated as an AONB. There is a listed building in close proximity to the west of the site but none situated within the site boundary.	Water / Sewerage (Welsh Water): The local water network should be sufficient. The site is adjacent to Holyhead WwTW which may give rise to odour, fly and noise nuisance for any development in close proximity. As such a buffer zone should be considered.
Adjoining Land Uses: Adjacent to surrounding employment uses. Large residential settlement to the north of the site. Anglesey Aluminium lies to the south east.	Electricity (Scottish Power): Work required – installation of 5 new 11kV substations, associated loop in work and upgrade to existing unit protection. Possible additional 11kV Circuits required to support the extra substation and manage the increase in fault level.
Other Constraints: The risk of flooding from rivers/sea and surface water is low at between 0.1% and 1% pa.	Gas (Wales & West Utilities): There are low level gas pipelines in various locations around the site, meaning that costs to connect to the local network should be relatively low.
Site Characteristics	
Highway Access: The site is 0.6 km away from Junction 2 of the A55. Direct access if provided off the A5153.	Ownership: Isle of Anglesey County Council
Infrastructure Requirements: Limited given extension to existing industrial estate.	



<p>Public Transport: The site offers proximity to some existing sustainable transport methods with Holyhead railway station 1.6 km away. There is a bus stop very close to the site outside Brantano which provides very frequent (every 10 minutes) services to Holyhead, Summer Hill.</p>	<p>Planning Status: Designated as part of the Anglesey Enterprise Zone. Site is also allocated as part of the current Isle of Anglesey development plan. Anglesey Council have plans to construct four bespoke modern business units on the site.</p>	<p>Summary – Role / Function (incl. Sector Drivers): The site is mainly vacant with a likely function of B1, B2 or B8 use. The site benefits from inclusion in the Anglesey Enterprise Zone. Penrhos Industrial Estate has a focus on supply chain opportunities due to its proximity to key energy projects.</p> <p>Sub-regional strategic site serving both local and regional needs.</p>
<p>Quality of Site Environment: The site is largely vacant with low lying grassland immediately surrounding it. Penrhos Industrial Estate benefits from relatively flat topography.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Bryn Cefni Business Park	Site Description and Land Use: This site consists of a number of vacant development plots within an established industrial area.
Grid Ref: SH 46345 75069	
Site Area (Ha): 57	
Developable Area (Ha): 18	
Site Constraints	
Environmental Constraints: To the south east of the site there is a scheduled ancient monument. There are small areas of land within the site boundary that have a medium chance of flooding from surface water – between 1% and 3.3% pa; this is to the east of the site. There is a high chance of flooding from the sea/nearby rivers, this is greater than 3.3% pa. In terms of nearby reservoirs, Llyn Cefni could have an impact upon flooding but this is highly unlikely.	Water / Sewerage (Welsh Water): Local water network should be adequate to accommodate expansion of the business park. Sewerage network in the area is extensive and where sewers cross potential development sites, development density will be restricted. Llangefni main sewage pumping station is located in the area and may need assessment to ascertain its capacity, dependant on the location and type of development proposed.
Adjoining Land Uses: To the south of the site there are multiple low level fields used for agricultural purposes. To the west of the site lies the Cefni sewerage scheme. The town of Llangefni lies to the north of the site – some of the plots are located within Llangefni.	Electricity (Scottish Power): Existing connections to serve current occupiers. Capacity would need to be assessed based on requirements of end users. Large extension likely to require new 33kV substation and associate 11kV protection works.
Other Constraints: None known.	Gas (Wales & West Utilities): There are low pressure gas connections in close proximity to the west of the site. This



	should provide sufficient opportunity for new development to connect to existing facilities.	
Site Characteristics		Infrastructure Requirements:
Highway Access: Access to a number of plots is from Industrial Estate Road. The site is well connected in terms of existing highway infrastructure.	Ownership: Multiple ownership.	Limited requirements as extension of existing business park
Public Transport: The nearest train station is Llanfairpwll located approximately 10 km away. There is a bus stop nearby providing regular links to Bangor Bus Station and a service heading north east to Llangefni and Holyhead.	Planning Status: Designated as part of the Anglesey Enterprise Zone. The site is also allocated as part of the Anglesey Development Plan. Planning applications have recently been submitted for a biomass co-generation plant, industrial units and a food processing/distribution unit.	Summary – Role / Function (incl. Sector Drivers): Regional Strategic site which will continue to form a key location for investment for more traditional industries. Potential for energy related investment in line with the Energy Island Programme.
Quality of Site Environment: The occupied plots appear well kept and the surrounding infrastructure is in good condition. The on-site buildings appear to be robust, purpose built and well-maintained.		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Creamery Land	Site Description and Land Use: The site is vacant, low lying land currently used for grazing and located on the outskirts of Llangefni. The site is in close proximity to the proposed Wylfa development which could facilitate demand for a range of energy uses and development i.e. offices and warehousing.
Grid Ref: SH 45702 74695	
Site Area (Ha): 5	
Developable Area (Ha): 5	
Approx. Rental Levels: Dependent on end use.	

Site Constraints

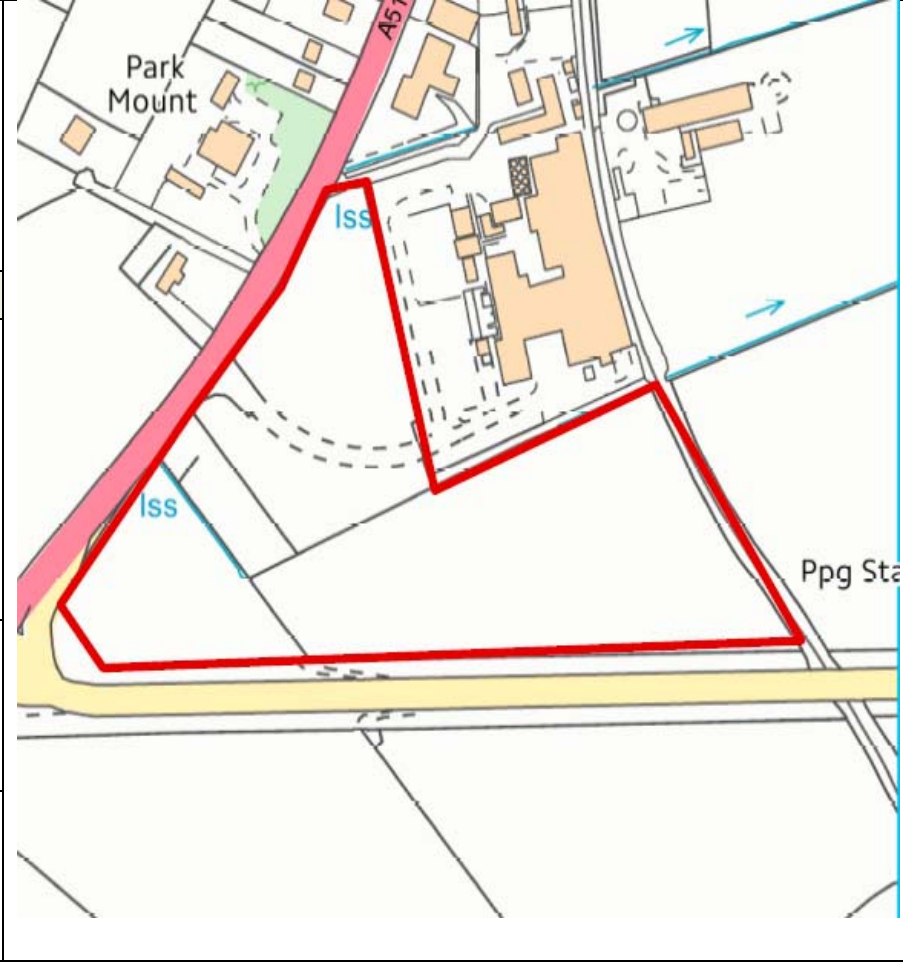
Environmental Constraints: There is a high chance of flooding from the sea/nearby rivers to the east of the site– this is greater than 3.3% per year. The risk of flooding from surface water is low at between 0.1% and 1% per year. The Llyn Cefni reservoir could also impact upon flooding but this is highly unlikely.	Water / Sewerage (Welsh Water): The site is close to existing services so it is likely that there will be opportunity to link with existing services.
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Adjoining Land Uses: To the south of the site lie a number of low level fields used for agricultural farming. To the north of the site there are a number of warehouses and a factory.	Electricity (Scottish Power): Dependant on demand of end users.
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Other Constraints: None known.	Gas (Wales & West Utilities): As the site is vacant there is currently no gas infrastructure in place. The nearest low pressure pipeline is in close proximity to the north.
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Site Characteristics

Highway Access: Located 1.2 km from the A55 but some localised access issues – a new access point would be required.	Ownership: Unknown
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Infrastructure Requirements: No infrastructure currently present on the site, new access point needed. The site is close to existing services so there is likely to be potential for linking to existing infrastructure.

<p>Public Transport: Site offers proximity to some non-car alternatives and is located 9.7 km away from Llafairpwll railway station. The nearest bus stop is on Industrial Estate Road linking the area to Llengefni and Holyhead.</p>	<p>Planning Status: Site is allocated as part of the current Isle of Anglesey development plan.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Extension site to Bryn Cefni with potential to operate as part of the wider Regional Strategic Site, focussing on the energy, life sciences and manufacturing sectors.</p>
<p>Quality of Site Environment: The site is currently vacant with a fairly even topography.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Lledwigan Farm	Site Description and Land Use: Site is located in a prime location between the A55 and Llangefni offering opportunities to link with existing employment base in Llangefni. It is currently 100% vacant and could be used for B1, B2 and B8.
Grid Ref: SH 45614 74452	
Site Area (Ha): 20	
Developable Area (Ha): 20	
Approx. Rental Levels: Dependant on end use.	

Site Constraints

Environmental Constraints: Immediately to the south of the site lies the Lledwigan Lodge which is a Listed Building. There is a small area with a high chance of flooding from surface water (3.3%+ pa); this is to the south of the site. To the south east of the site, there is an area with a high (3.3%+ pa) chance of flooding from the sea/nearby rivers.	Water / Sewerage (Welsh Water): 6" cast iron main passes nearby, but would require renewing if site to be developed. Llangefni main sewerage pumping station may need assessment to ascertain capacity. No problems in principle at the Llangefni WWTW.
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Adjoining Land Uses: The site is surrounded by agricultural land to the east, south and west. To the north lies the Creamery Land potential employment site.	Electricity (Scottish Power): Dependant on demand of the end use.
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Other Constraints: There are some topographical issues with the site.	Gas (Wales & West Utilities): As the site is vacant, there are currently no gas services within the site boundary. The nearest low pressure connection is to the north of the site.
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Site Characteristics

Highway Access: The site is in a prime location between the A55 and Llangefni. Direct access to the site is provided off the A5114.	Ownership: Unknown
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Infrastructure Requirements: Indicative cost to make the site deliverable is approximately £2/£2.5 million to include highway improvements, utilities infrastructure and further studies (ecology and archaeology).

<p>Public Transport: The closest train station is to the south east of the site at Llanfairpwll (9.7 km away). The nearest bus stop is Nant Turnpike and provides links to Llangefni Library and Holyhead, Summer Hill. This is a twice hourly service.</p>	<p>Planning Status: The site is allocated as part of the current Isle of Anglesey Development Plan.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Extension site to Bryn Cefni with potential to operate as part of the wider Regional Strategic Site, focussing on the energy, life sciences and manufacturing sectors.</p>
<p>Quality of Site Environment: As the site is vacant, little information can be provided at this stage.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Gaerwen Industrial Estate
Grid Ref: SH 47955 71575
Site Area (Ha): 115
Developable Area (Ha): 22
Approx. Rental Levels: Unknown

Site Description and Land Use: Sub-regional strategic site which offers potential to expand the existing employment base. The site is part of Anglesey Enterprise Zone and the spare capacity on the site provides short and long term opportunities for low carbon energy businesses. Further north (see inset) the science park proposals offer potential for the existing employment site to further expand and develop.

Site Constraints

Environmental Constraints: The site is located approximately 1280 metres from the Malltraeth March SSSI. There are also listed buildings in close proximity to the site. There are a number of areas on the site that are susceptible to flooding from surface water – this ranges from between low (0.1% pa) to high (3.3%+ pa).

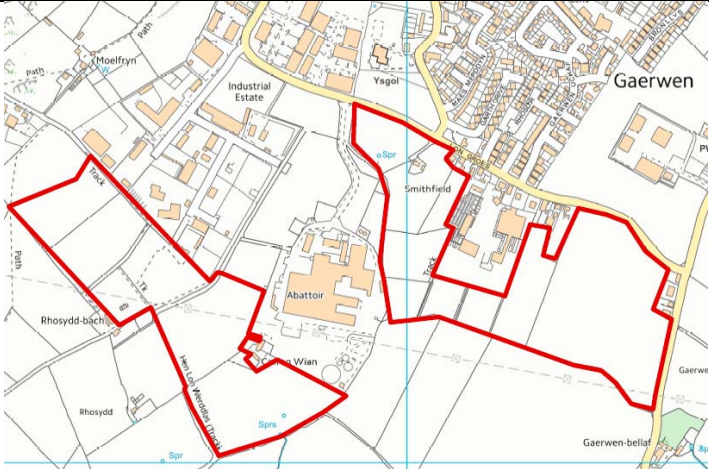
Water / Sewerage (Welsh Water): The local network is adequate to provide water supplies for the domestic element of the water demands arising from the proposed development area. A hydraulic modelling assessment is required to determine an adequate point of connection to the public sewer. Off-site sewers would be required for the western half of the site as the nearest public sewer is approximately 700 metres north of the site.

Adjoining Land Uses: The residential settlement of Gaerwen lies to the east of the site with further employment uses to the south. To the north east lies low level grassland, with the SSI to the west.

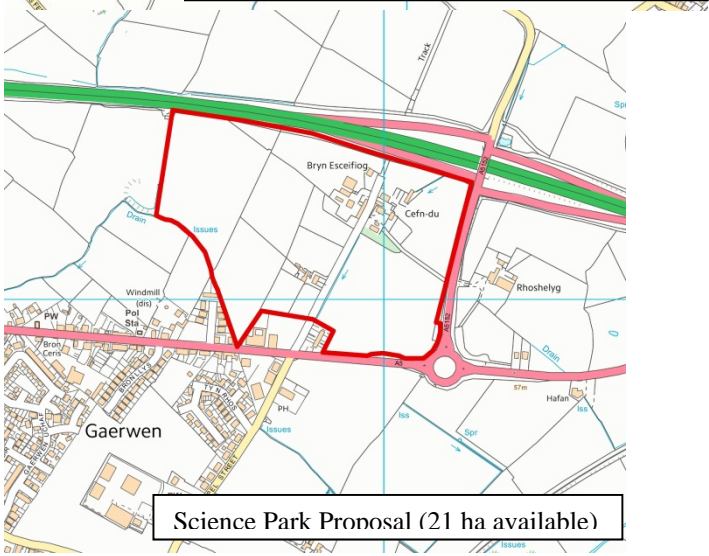
Electricity (Scottish Power): A new 33kV substation is required along with reconductoring of existing 33kV feeder connection. Cost between £3/5 million.

Other Constraints: High up-front costs to improve access. No obvious remediation issues associated with the site however further investigation would be required to confirm this.

Gas (Wales & West Utilities): There is currently no gas infrastructure in place, with no existing provision nearby. Implementation of a connection could be costly.



Gaerwen Industrial Estate (22 ha available)

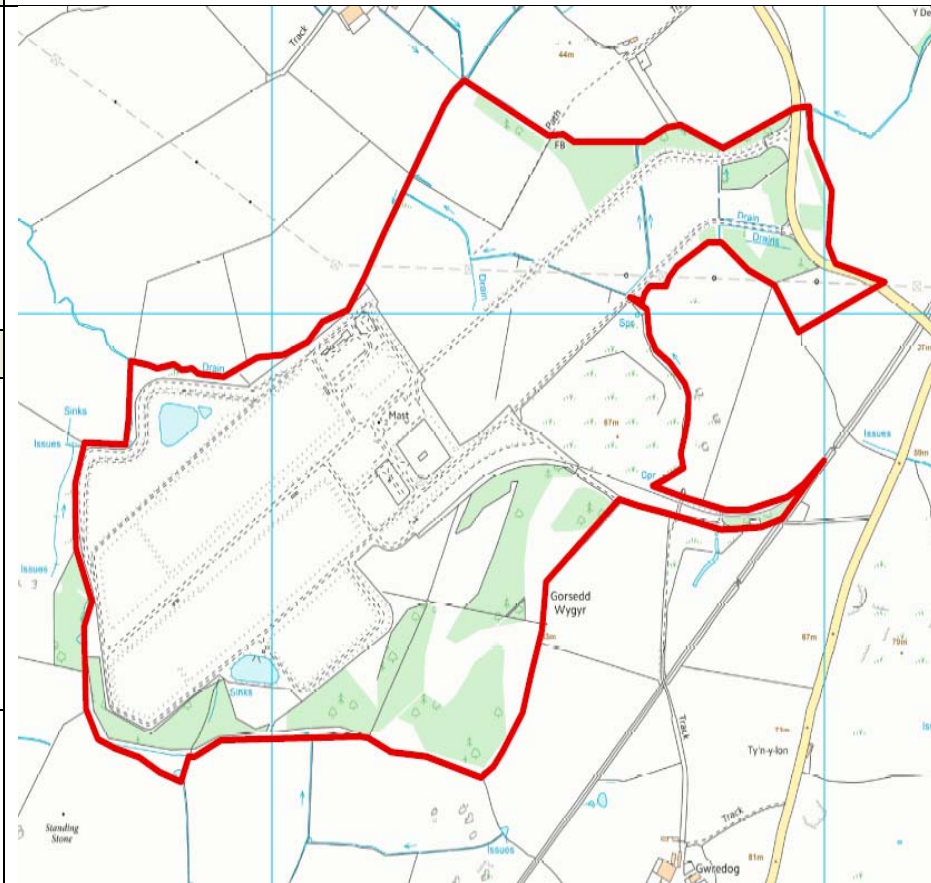


Science Park Proposal (21 ha available)

Site Characteristics		Infrastructure Requirements: The southern plot to extend the existing estate has significant access issues and a new road would have to be put in place in order to secure appropriate access to it. Services such as electrical, water supply, surface water drainage and sewerage would also need to be provided. The additional area to the east of the existing estate would be subject to planning approval and would also require significant investment in new road, energy, water and communications infrastructure. Indicative costs to make site deliverable are between £3.0m and £3.5m.
Highway Access: Located close to Junction 7 of the A55, in close proximity to the A5.	Ownership: Site is partly owned by the Isle of Anglesey Council and partly by private individuals.	
Public Transport: The nearest train station is at Llanfairpwll. There are a number of bus stops along Holyhead Road connecting the site to Bangor Railway Station and Llangefni (twice hourly).	Planning Status: Allocated as part of the current Isle of Anglesey development plan - identified as a potential prestige employment site within the UDP.	
Quality of Site Environment: Well-maintained and functional environment. A number of trees planted on the site to soften its appearance. Internal infrastructure in good condition.		
		Summary – Role / Function (incl. Sector Drivers): Regional Strategic Site with a focus on knowledge led growth should the Science Park progress on land adjacent.

North Wales Employment Land Strategy – Site Appraisal

Site Name: Former Shell Site, Rhosgoch	Site Description and Land Use: Interest in the form of energy related uses – B1 and B2 use. The site is located in close proximity to Wylfa and could play a role in providing supporting investment for the Irish Sea offshore wind Round 3 zone. This could lead to a demand for energy uses and supporting development i.e. offices, warehousing and manufacturing.
Grid Ref: SH 41039 90679	
Site Area (Ha): 82	
Developable Area (Ha): 82	
Approx. Rental Levels: Unknown	
Site Constraints	
Environmental Constraints: The site is located 1654m from the Llyn Hafodol and Cors Clegryrog SSSI. There is a low (between 0.1% - 1% pa) chance of flooding from the sea and nearby rivers; this could affect the north border of the site. There are small areas of land with a low (between 0.1% - 1% pa) risk of flooding from surface water.	Water / Sewerage (Welsh Water): No public sewers in close proximity to the site. If a connection is made it is unlikely that improvement works would be needed at Amlwch WWtW. A new water main would be required to connect to the existing 12" water main which is approximately 650 metres to the north of the site.
Adjoining Land Uses: This site is rural with open countryside surrounding it in all directions. There is a camping site to the south east, with an undulating area of scrubland with a large body of water within to the east.	Electricity (Scottish Power): Work will also be required in the form of a new 33kV substation and loop in of existing 33kV circuits. Estimated costs between £1.5-6 million.
Other Constraints: Demolition will be required to clear existing works; there could also be remediation required. Further investigation will be necessary.	Gas (Wales & West Utilities): There is a high pressure gas pipe that feeds into the site to the north east. Depending on the scale of development on site, this may need to be downgraded to



	intermediate. For high pressure connections, any works within 15m of the site will need to be assessed by an engineer.	
Site Characteristics		Infrastructure Requirements: There is no infrastructure on the site at present – there are two access points but this will need to be improved to accommodate mew development. A number of services will need to be provided i.e. electrical water supply, surface water drainage and sewerage.
Highway Access: The site has poor access to primary road network. Works are planned for the A5025 which will improve journey time to primary road network however traffic will still have to travel along rural roads prior to reaching A5025.	Ownership: Anglesey Charitable Trust – creates tools such as deferred payment on land sales	
Public Transport: Given the rural nature of this site, public transport connections are poor.	Planning Status: The site is allocated within the Ynys Mon Local Plan (adopted 1996) for employment use (site S14).	Summary – Role / Function (incl. Sector Drivers): Site is understood to be preferred location for convertor station associated with the Rhiannon offshore wind farm.
Quality of Site Environment: The site is low level grassland; however the previous use as a shell tank farm could result in the need for remediation works.		

North Wales Employment Land Strategy – Site Appraisal	
Site Name: Cibyn Industrial Estate	Site Description and Land Use: Vacant development plots on the site are well serviced by the existing road infrastructure and the most suitable land use would be either B1, B2 or B8. The site is mainly vacant and flat with acceptable visual amenity.
Grid Ref: SH 49663 62666	
Site Area (Ha): 37.6	
Developable Area (Ha): 7.31	
Site Constraints	
Environmental Constraints: To the west of the site there is a low chance (between 0.1% and 1% pa) of flooding from surface water. To the east of the site, not within the site boundary, there are areas of designated ancient woodland.	Water / Sewerage (Welsh Water): Main network throughout site.
Adjoining Land Uses: To the north and west of the site are residential areas. To the south lies open countryside with a large holiday park beyond the fields.	Electricity (Scottish Power): Connections should be possible depending on required demand.
Other Constraints: None identified.	Gas (Wales & West Utilities): There are a number of low pressure gas pipes around the site so new could development could connect to existing Infrastructure. Any works within 3m of the site will need to be inspected by an engineer.
Site Characteristics	
Highway Access: The site has excellent internal road access and access to the A487 and the A55 is also very good.	Ownership: Welsh Government
Public Transport: Site offers proximity to some existing non-care alternatives and is 13 km away from Bangor railway station. There are two nearby regular bus stops on Llanberis Road heading west	Planning Status: The site is allocated within the local development plan.
Infrastructure Requirements: Limited as part of existing industrial estate.	
Summary – Role / Function (incl. Sector Drivers): Sub-regional site to support indigenous growth and retain existing key employers.	



to Caerfon Bus Station and east to Llanberis Interchange and Rhes Fictoria.		
Quality of Site Environment: Well-maintained landscaping, purpose built, low-level units. Soft-landscaping in the form of trees planted around the site.		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Parc Bryn Cegin
Grid Ref: SH 59293 70476
Site Area (Ha): 35.9
Developable Area (Ha): 35.9
Approx. Rental Levels: Dependent on end use.

Site Description and Land Use:
 Currently the site is undeveloped with serviced plots on the business park ready for development. The site has been separated into clusters of B1, B2 and B8 and B1, B2 and B8 use classes. The site has been landscaped to maximise the benefits of the exceptional natural surroundings.

Site Constraints

Environmental Constraints: There is a listed building on the site to the north east. There are also a number of areas of designated ancient woodland to the north and east of the site. To the north of the site lies a SAM, this is not within the site boundary.

Water / Sewerage (Welsh Water):
 Trunk 250 hppe passes nearby and prv/meter connection ready to provide for site. Main exist throughout site, but are not connected at the moment.

Adjoining Land Uses: Site adjacent to some employment uses to the north west and residential to the east. To the south lies open countryside.

Electricity (Scottish Power):
 Dependant on demands of the end user.

Other Constraints: None known.

Gas (Wales & West Utilities): There is an intermediate pressure pipeline to the east of the site; works within 3m of this area will need to be inspected by an engineer.

Site Characteristics

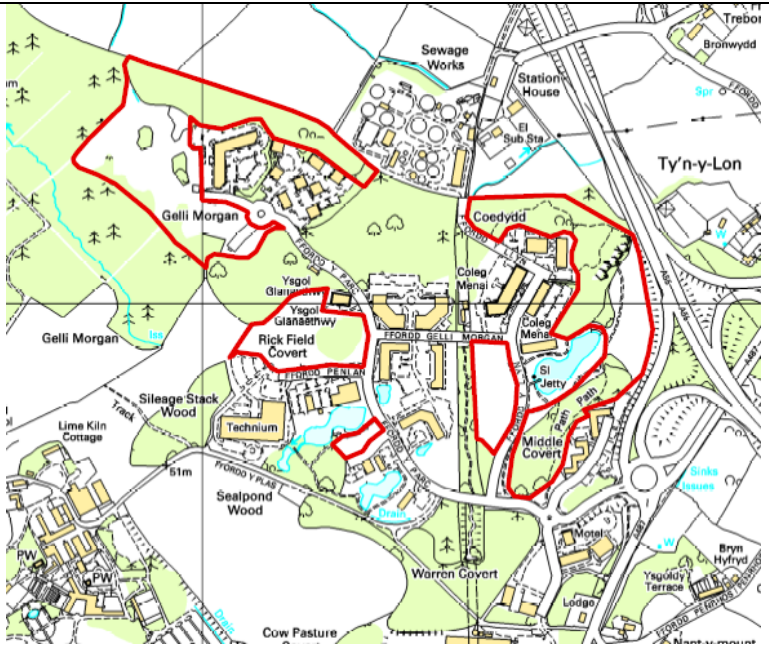
Highway Access: 0.9 km to the A55.

Ownership: Welsh Government. UK Land and Property selected as development partner.



Infrastructure Requirements: The masterplan is underpinned by a multi-million pound infrastructure package, creating a spine road through the site from a roundabout junction off the old A5, Llandegai Road. Separate safe routes are provided for pedestrians and cyclists together with high-quality facilities for public transport.

<p>Public Transport: Local buses serve the site from Bangor City Centre 2.5 km away with its major rail links that include rapid inter-city services to London. The closest bus stop is Llandegai Vicarage.</p>	<p>Planning Status: Site is part of a significant employment development proposal.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Regional Strategic Site identified for inward investment potential.</p>
<p>Quality of Site Environment: As the site is vacant, there is limited information on the site quality.</p>		

North Wales Employment Land Strategy – Site Appraisal		ARUP
Site Name: Parc Menai	<p data-bbox="745 280 1261 523">Site Description and Land Use: Existing high quality business park with a total of four available development plots. Size of the site is likely to restrict its potential uses to B1. Development of the site is likely to contribute towards investment, employment and activity that will maintain or strengthen the status of Bangor as a sub-regional centre.</p> 	
Grid Ref: SH 54354 69886		
Site Area (Ha): 24.7		
Developable Area (Ha): 6.3		
Approx. Rental Levels: Dependant on end use and quality of premises.		
Site Constraints		
Environmental Constraints: There are areas of designated ancient woodland located on a number of areas within the site boundary. There are no listed buildings or other environmental designations in close proximity.	Water / Sewerage (Welsh Water): Main network 150/200mm DICL throughout business park	
Adjoining Land Uses: The site is in the centre of a high profile employment location. The small residential settlement of Treborth lies to the north east of the site.	Electricity (Scottish Power): Connection should be possible. Capacity would need to be established based on user requirements.	
Other Constraints: There are a number of areas on the site susceptible to flooding from surface water; the chances of this are however very low at between 0.1% and 1% pa.	Gas (Wales & West Utilities): There is an established gas network that services the existing development plots. It is thought that any new development in the area would be able to connect to existing facilities.	
Site Characteristics		
Highway Access: The site is 0.4km away from the A55. The main access is from the A487 onto Ffordd Y Parc.	Ownership: Welsh Government	Infrastructure Requirements: Further investment in public transport facilities should be sought. It is also likely that existing infrastructure in close proximity to the site can be expanded.
Public Transport: Parc Menai is 3.8 km from Bangor Railway Station. The site offers proximity to some existing non-car alternatives	Planning Status: The site is safeguarded for employment within the Gwynedd UDP.	Summary – Role / Function (incl. Sector Drivers): This is an established employment site offering opportunity for expansion. The likely focus of the site will be B1 although there is currently a range

<p>but this could be improved. The nearest bus stop is at Ffordd y Parc which provides links to Upper Bangor.</p>		<p>of educational, private and public sectors organisations on the site. Sub-regional Strategic Site offering potential for high quality light industrial and office accommodation across sectors.</p>
<p>Quality of Site Environment: There are areas of dense woodland on the site, particularly along Ffordd Y Parc. The topography is level and not constricting in terms of development.</p>		

North Wales Employment Land Strategy – Site Appraisal	
Site Name: Abergele South East Grid Ref: SH 95361 77191 Site Area (Ha): 18.6 Developable Area (Ha): 3.7 Approx. Rental Levels: Dependent on end use.	Site Description and Land Use: This site is allocated for B1, B2 or/and B8 use. Two hectares have been allocated purely for B1 use.
Site Constraints	
Environmental Constraints: There is a narrow water course running through the site, this has resulted in parts of the site having a high chance of flooding from surface water (3.3%+ pa). The north of the site has a low chance of flooding from rivers and sea – between 0.1% and 1% pa.	Water / Sewerage (Welsh Water): There is no problem making a mains water supply to this site. Supply likely to be made as part of wider mixed use scheme.
Adjoining Land Uses: To the west of the site lies residential use. To the north, east and south there is an abundance of open countryside.	Electricity (Scottish Power): Capacity and necessary upgrades would depend on end users.
Other Constraints: No other constraints known.	Gas (Wales & West Utilities): There is a low pressure connection to the south west of the site. This runs along the boundary; there are however no pipes in existence within the site boundary.
Site Characteristics	
Highway Access: Direct access is provided from the A55. Access could also be created from the A547 (Rhuddlan Road).	Ownership: Unknown.
Public Transport: The nearest bus stop is Ty Gwyn Jones which is in walking distance and	Planning Status: Allocated for housing and mixed-use in the Conwy LDP.
Infrastructure Requirements: Site currently greenfield allocation. All access and internal infrastructure required.	
Summary – Role / Function (incl. Sector Drivers): Site likely to perform a sub-regional role attracting high quality B1	



<p>provides services to Prestatyn Bus Station and Llandudno (both hourly). The nearest train station is Abergele and Pensarn; this is a considerable distance from the site.</p>		<p>and B8 uses.</p>
<p>Quality of Site Environment: The site is currently vacant, so limited information can be provided on site quality.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Mochdre Commerce Park	Site Description and Land Use: Sub-Regional Strategic Site with a focus on B1, B2 and B8 uses. Recent development (5.5 Hectares constructed since 2007) includes industrial warehouse and office accommodation.
Grid Ref: SH 82020 78097	
Site Area (Ha): 10.3	
Developable Area (Ha): 5	
Approx. Rental Levels: £3.50	

Site Constraints

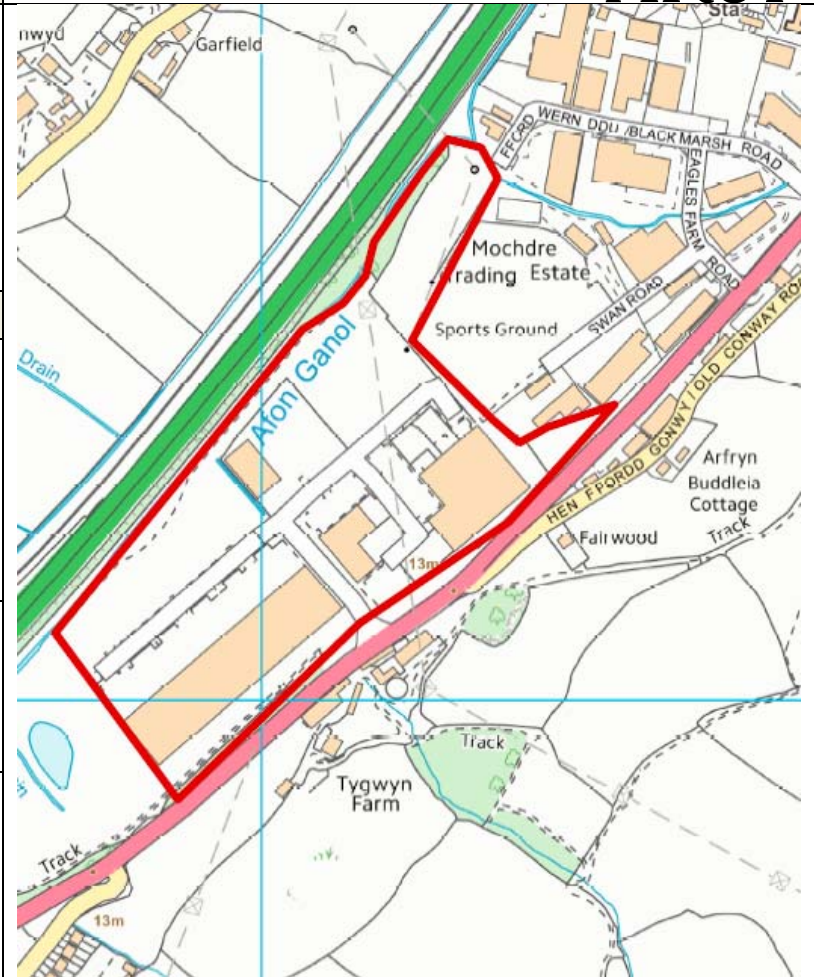
Environmental Constraints: Area of designated ancient woodland to the south of the site but not within site boundary. According to Natural Resources Wales, there is a high (3.3%+ pa) chance of flooding from surface water to the south of the site. A large proportion of the site is also at high risk (3.3%+ pa) of flooding from the sea/nearby rivers.	Water / Sewerage (Welsh Water): There is no problem in making a mains water supply available to the proposed site.
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Adjoining Land Uses: Surrounding land use of low level grassland with trees and shrubbery sparsely located to the north west and south west. The residential area of Mochdre is located to the north east.	Electricity (Scottish Power): There should be no problem in connecting new uses on this site. Load capacity would need to be assessed.
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Other Constraints: None known.	Gas (Wales & West Utilities): There is an established network of low pressure pipelines in the vicinity. Works within 3m of this area will need to be inspected by an engineer.
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Site Characteristics

Highway Access: Strategically located adjacent to the A55 expressway with access achieved off Junction 19.	Ownership: Unknown
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Infrastructure Requirements: Internal infrastructure is already established with seemingly limited investment needed.

<p>Public Transport: Nearest train station is located at Llandudno Junction. The no. 24 service links Mochdre (Conwy Road) with Colwyn Bay and Llandudno Junction; the service runs from 07.38 to 18.41.</p>	<p>Planning Status: Safeguarded for employment. It is expected that the site will be completed during the medium term phase of the LDP (by 2017).</p>	<p>Summary – Role / Function (incl. Sector Drivers): Sub-regional strategic site offering potential for further expansion. Development likely to be similar to that currently on site, attracting a variety of sectors.</p>
<p>Quality of Site Environment: The site has established internal infrastructure and is relatively flat. The undeveloped part of the site is currently being levelled with compact stone being laid. Trees line the west boundary of the site.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: North East of former Goods Yard
Grid Ref: SH 79722 77720
Site Area (Ha): 0.4
Developable Area (Ha): 0.4 (B1 use)
Approx. Rental Levels: Dependant on end use.

Site Description and Land Use: This site is currently allocated for B1 employment and is well placed in terms of access and public transport connections. The site is predominantly scrub land which could present complications in terms of ecology.

Site Constraints

Environmental Constraints: No issues known regarding either flooding or environmental designations.

Water / Sewerage (Welsh Water):
 There is no problem in making a mains water supply available to the proposed site.

Adjoining Land Uses: There is a large scrap yard to the south of the site and a train line providing the north boundary of the site with housing immediately beyond. To the west of the site there is a large entertainment complex including cinema.

Electricity (Scottish Power):
 Capacity will depend on end user.

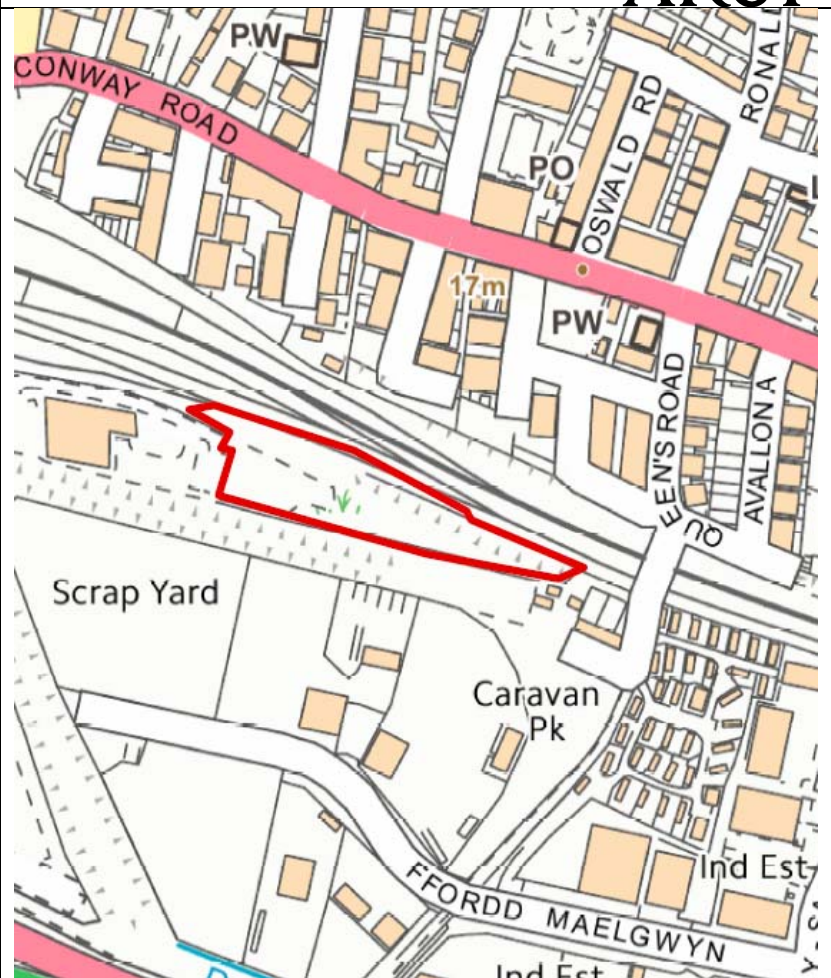
Other Constraints:
 None identified.

Gas (Wales & West Utilities): There are low pressure gas pipes in existence to the west of the site. There could be potential for the site to connect to these facilities.

Site Characteristics

Highway Access: Access to the site is provided from Junction Way off the A546.

Ownership: Unknown.



Infrastructure Requirements:

Internal infrastructure required and possible upgrade to railhead.

<p>Public Transport: The site is in close proximity to Llandudno Junction station however, there are no bus stops nearby.</p>	<p>Planning Status: Allocated for B1 employment within the Conwy LDP.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Development of this site will be driven by sectors requiring a strategic rail distribution head. This could link to the energy sector and the transport of fuel stock for example (e.g. Biomass).</p>
<p>Quality of Site Environment: The site is currently undeveloped so limited information can be provided on this. Currently the site has a number of silver birch trees scattered around the perimeter; much of the site could be considered unmaintained scrubland.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Llanbedr Airfield	Site Description and Land Use: The site is currently a disused airfield with all ancillary infrastructure in place i.e. runways and control towers in need of refurbishment. The site could accommodate the priority sector of Unmanned Air Systems (UAS) if appropriate development were to be undertaken. The use class for the site is restricted to Aeronautical Use and use classes B1, B2 and B8.
Grid Ref: SH 56870 25887	
Site Area (Ha): 228	
Developable Area (Ha): 31.4	
Approx. Rental Levels: Dependant on end use.	

Site Constraints

Environmental Constraints: Part of the site is within Flood Zone C1 – a flood modelling exercise should be carried out to determine flood risk. The site is located within the Snowdonia National Park boundary and there is a National Nature Reserve and Special Area of Conservation in close proximity to the east of the site. To the east and west of the airfield lies Sites of Special Scientific Interest.	Water / Sewerage (Welsh Water): Foul sewage from the site drains to an on-site treatment plant located in the north east of the site. It is understood that this plant has capacity to serve a population equivalent of 150 people. The condition of the existing foul drainage network and the treatment plant are not known. Consequently, it has been assumed that a new foul drainage network will be required to serve the proposed development.
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Adjoining Land Uses: There is a large camp site to the north west of the site (Shell Island) and Llanbedr village lies to the north east. There is also a camping and touring park to the south of the site.	Electricity (Scottish Power): The existing electrical infrastructure on site consists of dual incoming feeds that enter the site via separate dedicated substations at the site boundary. The condition of the existing 11kV infrastructure is unknown and due to the age of the site there is concern that the existing cabling may not be acceptable for re-use or of sufficient capacity to meet the proposed developments in site.
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Other Constraints: There are development restrictions in terms of the height of the buildings; this aims to maintain visual and landscape quality.	Gas (Wales & West Utilities): There is no mains gas supply to the site and the costs of bringing a service to the site will be very high due to the distance from the nearest network.
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Site Characteristics		Infrastructure Requirements: This site requires investment in access and utilities infrastructure (including water and electricity supply). There will also need to be investment in security should the RPAS / MRO developments proceed.
<p>Highway Access: Access is provided from Mochras Road which is constrained between the site and Llanbedr village. This road is very narrow and unsuitable for large vehicles. Improvements to access will need to be sought as part of the development.</p>	<p>Ownership: Welsh Government – leased to Llanbedr Airfield Estates LLP</p>	
<p>Public Transport: There are bus services to Llanbedr village and Llanbedr Train Station is in close proximity.</p>	<p>Planning Status: The site sits within the Snowdonia Enterprise Zone; it also lies within Snowdonia National Park and therefore comes under their control.</p>	<p>Summary – Role / Function (incl. Sector Drivers): Llanbedr Airfield has a focus on aviation use particularly RPAS and MRO activity. A masterplan has recently been produced which develops this vision to support the aeronautical sector. Development of the site would contribute to the economy of North Wales and promote the area as a key RPAS destination. Alongside this, the Masterplan also suggests a small element of business park on the site.</p>
<p>Quality of Site Environment: The actual site is relatively flat with a mixture of poor quality and refurbished buildings on site. The runways are in fairly good quality but with investment needed for improvement.</p>		

North Wales Employment Land Strategy – Site Appraisal

Site Name: Trawsfynydd	Site Description and Land Use: The site currently houses a large nuclear power station in the process of being decommissioned. Final site clearance is likely to be between 2076 and 2085. The power station is situated next to Llyn Trawsfynydd, a large lake used by an existing angling community.
Grid Ref: SH 69190 38306	
Site Area (Ha): 150.4	
Developable Area (Ha): 50	
Approx. Rental Levels: Dependent on end use.	

Site Constraints

Environmental Constraints: Situated within Snowdonia National Park and the broader area includes the Meirionnydd Oakwoods and Bat Sites Special Area for Conservation (SAC), the Migneint-Arenig-Dduallt Special Protection Area (SPA); National Nature Reserve and Site of Special Scientific Interest as well as the Scheduled Monument at Tomen-y-Mur.	Water / Sewerage (Welsh Water): The site is not connected to mains drainage and has its own sewage plant operated by Magnox. The sewage plant has capacity to cater for up to 650 personnel but has limited life remaining. Any redevelopment of the site is likely to require investment in refurbishment or replacement of the sewage treatment facilities.
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Adjoining Land Uses: Open countryside surrounds the site which is neither wooded nor allocated for alternative land use in the Eryri Local development Plan.	Electricity (Scottish Power): There is significant grid infrastructure on the site that potentially provides affordable and easily accessible electricity. The 400KV grid connection at Trawsfynydd is an important asset, providing an opportunity for both importing and exporting electricity. The electricity infrastructure could support renewable energy technologies.
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Other Constraints: The site includes Trawsfynydd Nuclear Power Station which is currently being decommissioned. The two reactor buildings are likely to remain as long term built features. There will be a need to de-license land within the nuclear licensed boundary.	Gas (Wales & West Utilities): The nearest gas pipeline is 70km in distance from the site towards Wrexham and the Cambrian mountains, so a new connection is likely to be costly.
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Site Characteristics		Infrastructure Requirements: Investment will be necessary in public transport measure, utilities and internal access within the site boundary. In the short term whilst the site is being decommissioned, consideration will need to be given to access off the main road.
Highway Access: Primary access is from the A470 to the east of the site.	Ownership: Nuclear Decommissioning Authority (NDA)	
Public Transport: There is a bus stop outside the entrance of the site which provides links to Bangor train station and Blaenau Ffestiniog. There is a disused railhead adjacent to the site, however this stretch of railway line has not been operational since 1995.	Planning Status: The land is within the Snowdonia National Park and also lies within the Enterprise Zone. It is not allocated in the Eryri Local Development Plan.	Summary – Role / Function (incl. Sector Drivers): Development of the Trawsfynydd site is likely to be reliant on a number of factors including planned ICT upgrades and potential power upgrades (dependant on end use). The site is being promoted for data centre and/or energy related developments. Site identified as a Reserve site given uncertainty of future uses.
Quality of Site Environment: Depending on the proposed use of the site and exact location of development, remediation works may be required. A large proportion of the site, particularly to the north and north east is subject to fairly dense tree cover.		