

Powys County Council

Powys Employment Needs Assessment

Technical Report 2

Property Market Overview & Supply Analysis

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1 INTRODUCTION

This report forms part of a suite of reports produced as part of the Powys Economic Needs Assessment (Including Employment Land Review) and should be read in conjunction with the following:

- **Core Report**

Providing an overview of the key findings from the individual technical studies along with a summary of recommendations made and details of future land requirements based on economic employment forecasting.

- **Technical Report 1 – Socio Economic Context**

Setting a baseline of the Powys economy and the socio-demographic context for the study and drawing conclusions for consideration in the demand analysis.

- **Technical Report 3 – Demand Analysis – Future Change**

Providing an analysis of the quantum and type of employment land required across the County over the plan period (2011 – 2026).

It forms part of the background information behind the general advice to Powys County Council on the County's future economic needs and requirements which will subsequently inform the preparation of the Local Development Plan 2011-2026.

This report (**Technical Report 2**) presents an overview of the property market in the County, exploring both the office and industrial property markets and provides a national overview, a more detailed assessment for each of the market sectors in Powys and also takes into consideration the likely implications for Powys in the years ahead, particularly focussed on plan making decisions and policy recommendations.

It should be noted at the outset that the study has not considered employment land within the Brecon Beacons National Park Authority area, although linkages to and from this area have been considered. The National Park Authority are progressing a similar supply analysis.

The office market in Powys is quite limited and is mainly confined to some of the larger towns and to some small developments by Welsh Government. The industrial market, whilst still small in regional terms is much larger and more active than the office market and reflects the needs of the County and the much larger historic development program undertaken by the Development Board for Rural Wales, the Welsh Development Agency and Welsh Government. Due to the relatively restricted size of both markets, there is not a lot of published data available in terms of demand and take up figures and we have had to rely in part on information provided by key stakeholders in these markets, such as commercial agents and property managers. The notable exception to this is the information collected by Welsh Government through their Wales Property Database.

Those consulted for information and their opinions on matters such as property availability and demand, included the following:

Adrian Leonard – Property manager Welsh Government (WG)

Lee Lapham – JLL asset valuer for WG Portfolio

Stuart Hogg – Letting agent for WG Portfolio Southern Powys

Stuart Phillips – Letting agent for WG Portfolio Northern Powys

Amanda Jex Green – Property Database for WG

John Townsend – GVA managing agent for Powys Council's property portfolio

James Harrison – Letting agent Towler Shaw Roberts

Ceri Stephens – Mid Wales Manufacturing Group

Peter James – Welsh Government

Karen Lewis – Powys County Council

Di Greeves – Powys County Council

These consultations included one to one meetings and telephone discussion in order to inform the baseline and ensure a comprehensive review of the current employment land supply in the County.

Given the amount of Welsh Government owned employment land in the County a meeting was held with Peter James and Adrian Leonard to discuss their property strategy and investments, providing an insight to how the WG portfolio may change going forward. Similarly, discussions were held with Karen Lewis in relation to the Powys CC owned employment land.

Subsequent discussions were held with active agents in the area and Ceri Stephens of Mid Wales Manufacturing Group (MWMG) in order to understand the general market trends, activity and issues being faced by those operating in the Powys market.

Draft findings were presented to a panel which included a number of those identified above along with Cllr Wynn Jones, the portfolio holder for Regeneration and Planning. This meeting informed the completion of the final report.

Alongside this overview of the property market the report also presents findings of site and desk based work which explores the current stock of employment land and premises in the County. This supply based analysis has evaluated sites and premises against set criteria before drawing recommendations for each site in the context of future supply and economic needs across the County.

2 OFFICE MARKET TRENDS

2.1 Introduction

Up until 2008 the demand for office space in the UK was relatively high and this was largely driven by a stable economy and growing demand from both the financial services and public sector. Since this time however the general underlying economic conditions have deteriorated dramatically, demand from the financial services sector has contracted and as a result of new austerity measures, demand from the public sector has also diminished.

As a result of these changing economic conditions, both of these sectors are actively divesting themselves of surplus office accommodation wherever possible and vacancy rates have increased across the UK. Much of the accommodation that is vacant is older, poorer quality stock and there is evidence of a two tier market emerging between new/modern Grade A¹ stock and older secondary Grade B² stock. Many occupiers are using this fall in demand as an opportunity to upgrade from older grade B stock to modern grade A stock and this is causing further imbalances between the two.

Other issues facing the office market are the dramatic rise in the importance that occupiers are placing on sustainability and also changes in working practices brought about by advances in ICT. Sustainability now underpins all design, layout and technology decisions made within a property and many occupiers want their corporate ethos and identity to be reflected in the property that they occupy. Whilst new buildings can readily incorporate this shift in occupier demand, it is often less readily incorporated into existing and sometimes ageing buildings. Improvements in ICT and in particular connectivity mean that working patterns are changing and businesses often no longer need to provide a desk for every employee. These factors combined with an ever more mobile and flexible workforce has led to an increase in home working and hot desking. There is an emerging trend known as Thin Client, which allows all computers and applications to be run remotely off-site and this is further reducing the need for traditional desk and office space being geared to the total number of employees that a business has.

In Wales the main established office markets are concentrated in the cities of Cardiff, Newport and Swansea. Until quite recently Cardiff was by far the major centre and had the most active market that has been underpinned with strong occupier and investor demand. Over the past ten years however some quite considerable development has been achieved in Swansea with the development of SA1 assisted by the public sector and Newport has also achieved some private sector development assisted by Newport Unlimited. Due to the weaker underlying economic conditions however all of these cities have seen much weaker demand for office accommodation over the past few years and as a result new stock is not being developed and some commentators are saying that this will cause a potential issue in the future in attracting new occupiers and retaining existing occupiers.

¹ Grade A – Most sought-after stock, typically brand new or recently redeveloped. Prestigious and usually occupy prime locations.

² Grade B – Properties below Grade A remit, typically in terms of location, facilities and maintenance. Rents are often cheaper and supply more readily available.

2.2 Demand Drivers for Office Space

The major factors which are likely to govern future demand for office space are likely to include some of the following:

- The ever increasing importance of ICT and connectivity, which increases the ability to connect different parts of an organisation remotely and reduces the need for floor space as a result.
- Occupiers becoming ever more demanding for a high quality and sustainable building and environment, that not only promotes their image, but also reduces energy and maintenance costs, while at the same time increasing the productivity and performance of employees.
- Location factors such as close proximity to strong transport links, quality residential development, access to skilled labour and retail and leisure facilities.
- The potential increase in demand for smaller units of accommodation of less than 5,000 sqft to accommodate the likely rise in demand from small businesses replacing a shrinking public sector.
- The increase in Grade B stock as a result of occupiers downsizing and upgrading and the contraction of the public sector.

The above factors will influence the office market in the future and are likely to cause an imbalance between supply and demand. Potential occupiers will in many cases not be content with older Grade B stock that might well be reaching obsolescence in terms of location, size, layout, image and energy efficiency. This will lead to potential shortages of modern Grade A stock and an over supply of older Grade B stock. Other possible issues which will affect future supply are the lack of optimism for rental growth, soft yields and lack of investor appetite for anything other than Grade A property which will result in a lack of new development. The lack of bank lending which will hinder developers from building new stock and landlords from upgrading existing older stock.

Many of today's occupiers, particularly the larger corporate companies demand modern buildings that are in the right location, offer flexibility, energy efficiency, good connectivity and which project their corporate image. If a town or city does not have an available supply of such accommodation, then both potential and existing occupiers are likely to consider alternative locations which do offer the type of accommodation that they are looking for.

2.3 Powys' Office Market

There is little in the way of an established office market in Powys and what demand there is, is predominantly from the public sector, small professional firms and locally based businesses. Ystradgynlais, Brecon, Newtown, Llandrindod Wells and Welshpool are the towns that stand out as having any form of really active market and even these are very subdued with relatively low levels of take up and turnover.

Ystradgynlais has some modern hybrid units on the Woodlands Business Park, which have been developed by Welsh Government. These are circa 3,000 sqft / 280 sqm and despite taking a while to let have achieved rents of around £5.00 per sqft. The town would seem to benefit from its proximity to Swansea.

Brecon has a range of offices in the town centre, predominantly above shops, together with some more modern edge of town offices. The NFU has recently had a unit constructed on the edge of the town and is paying £10.00 per sqft and the RSPCA has recently taken a nearby unit at a similar rental level. The town would seem to benefit from its proximity to Cardiff and there is some evidence of a lack of supply and some pent up demand.

Newtown has the largest office provision of any of the towns and this is due to Ladywell House and Afon House, both of which are predominantly occupied by the public sector. St David's House also provides a large, relatively modern office accommodation in the town. In addition to these two buildings there is additional accommodation available above shops in the town centre and some additional provision on the surrounding industrial estates.

Llandrindod Wells also has a large amount of office space focussed largely around the public sector presence in the town.

Welshpool has a relatively small range of office accommodation much of which is situated above shops in the town centre together with a small business centre operated by Powys Council and New Dolanog House. The general perception is that the town benefits from its proximity to Shrewsbury, Telford and the West Midlands, the supply of accommodation is limited and there is a certain amount of pent up demand.

In addition to the offices in the above towns, there have been a number of small B1 office developments undertaken by Welsh Government in recent years. These have generally let quite well and have achieved rents typically in the region of £8.00 to £10.00 per sqft. There is little in the way of hard data to prove that demand existed for these developments, though it does demonstrate that often where a product is provided, there is a market for it that might not have been evident beforehand. These developments are all small and are of a very high quality and it is doubtful that due to the negative differential in the original development cost and the eventual return, these types of developments could be provided by the private sector without quite substantial assistance from the public sector. These developments include the following:

Parc Derwen Fawr at Llanidloes which comprises 4 office units of circa 700 sqft / 65 sqm each which are let at circa £7.50 per sqft to predominantly local businesses, many of which are connected to the energy industry.

Broadaxe Business Parc at Presteigne which comprises 8 units of circa 650 sqft / 60 sqm each which are let at circa £7.50 per sqft

Talgarth Business Park at Talgarth which comprises seven small units ranging from 225 sqft / 21 sqm up to 655 sqft / 61 sqm which is part let at circa £9.00 per sqft.

2.4 Office Availability & Demand

Tables 2.1 and 2.2 below summarise the levels of availability and enquiries for office property in Powys and Mid Wales for the period 1st April 2010 to 31st March 2011. This information has been obtained from the Welsh Property Database and is the only collected and recorded information that we have been able to find relating to availability and demand. The information on availability is collected by Welsh Government and it reflects the information submitted to them by owners, agents and other stakeholders marketing empty properties. The information on demand is a record of the number of people searching the database for available property. It should be noted that some of these might not have been actual potential occupiers looking for a specific property and that there are other potential occupiers who do not use the database and so are not recorded. The Mid Wales area referenced below includes Ceredigion, Powys and Gwynedd.

Table 2.1 – Office Availability

Unit Size	Powys	Mid Wales
0 – 5,000 Sq Ft (0 – 465 sqm)	14	35
5,000 – 10,000 Sq Ft (465 – 930 sqm)	1	3
10,000 – 15,000 Sq Ft (930 – 1395 sqm)	0	1
15,000 – 20,000 Sq Ft (1395 – 1859 sqm)	0	0
20,000 – 25,000 Sq Ft (1859 – 2323 sqm)	0	0
25,000 – 50,000 Sq Ft (2323 – 4645 sqm)	0	0
50,000 – 100,000 Sq Ft (4645 – 9290 sqm)	0	0
100,000 plus (9290 + sqm)	0	0

Table 2.2 – Office Enquiries

Unit Size	Powys	Mid Wales
General Searches	14	28
0 – 5,000 Sq Ft (0 – 465 sqm)	7	15
5,000 – 10,000 Sq Ft (465 – 930 sqm)	1	2
10,000 – 15,000 Sq Ft (930 – 1395 sqm)	0	0
15,000 – 20,000 Sq Ft (1395 – 1859 sqm)	0	1
20,000 – 25,000 Sq Ft (1859 – 2323 sqm)	0	0
25,000 – 50,000 Sq Ft (2323 – 4645 sqm)	0	1
50,000 – 100,000 Sq Ft (4645 – 9290 sqm)	0	0
100,000 plus (9290 + sqm)	0	0

2.5 Conclusion

Powys has a relatively small amount of office accommodation for a County of its size and there is little in the way of any form of established market. Whilst the above statistics are not conclusive, it can be seen how low the number of enquiries were last year searching for office accommodation in Powys. Much of the accommodation is situated above shops in some of the bigger towns and whilst this is suitable for established small professional firms, it is often not suitable for many of today's more modern types of businesses. One notable feature of the study has been that where offices have been developed by WG in recent years, with the notable exception of Talgarth, they have all attained good levels of occupancy and good rental levels. This could be due to the fact that there are a number of businesses being run from homes and barns in the County that might be ready to expand into suitable office accommodation were it to be available. With continued improvements in ICT and connectivity, we would expect to see more home working and more small lifestyle businesses being started in the County, many of which will require suitable accommodation in order to grow.

3 INDUSTRIAL MARKET

3.1 Introduction

The industrial property market in the UK has undergone something of a sea change over the past twenty years as traditional heavy manufacturing industries have declined and have been replaced with lighter higher value production and distribution uses which require a different type of property in different locations. The traditional industries were often based in a specific geographical location to benefit from certain raw materials and labour force, whereas the newer industries and businesses which have replaced them are often more footloose and do not have the same kind of geographical constraints. Whilst access to a decent labour pool is still important, access to market and a suitably specified property are more often of greater importance.

Wales has not been immune to these changes and has perhaps suffered an additional change as many of the industries and businesses that were attracted to the country to replace the declining heavy manufacturing industries, have now also gone into decline or have been moved back overseas to benefit from lower production costs. Examples of these include Sony, Panasonic, Bosch and many of their associated suppliers. This has left behind a legacy of large though quite modern production facilities, which in many cases have been bought by local developers and reconfigured into smaller units which are now once again fit for purpose and have provided a useful source of relatively low cost accommodation.

On the face of it there is a large oversupply of industrial property in Wales, though this has been exacerbated by the economic downturn of the last two years. As at the end of December 2010, it was estimated that there was about 18 million square feet of vacant industrial floor space in Wales. Of this only about 430,000 sqft / 39,950 sqm or 2.4% was new. These figures are somewhat skewed by the inclusion of some very large buildings that are arguably obsolete and have no further beneficial use. Some of these are now being demolished and examples of this include Draka Wire at Llanelli, Coopers Standard at Maesteg and the partial demolition of Hoover at Merthyr Tydfil.

Due to its geographical location and relatively low population, Wales has never really benefited from the boom in distribution and logistics. A whole industry has grown up in other parts of the UK centred around the Big Box distribution hubs and they have benefited from the economic benefits that go with this. The growing need for warehousing has also helped to absorb some of the former manufacturing sites as they became available in other parts of the UK. Avonmouth seems to be growing in importance as a distribution location and is the biggest single competitor to Mid and South Wales. Tesco have recently moved their chilled foods operation there from Chepstow and other big names include The Co-operative and John Lewis. One notable exception to this is Amazon, who opened a large state of the art distribution hub of 800,000 sqft / 74,322 sqm in Swansea in 2008.

3.2 Demand Drivers for Industrial Space

The demand for industrial sites and premises varies according to market sector. The key UK market trends influencing the demand for industrial space include:

- Large scale manufacturing processes continuing to be relocated overseas in order to achieve cost savings.
- The continued rise of imported goods and Just In Time (JIT) processes and the need for suitable warehousing and supply chains

- The continuing influence of the internet and ecommerce which is changing the nature and needs of traditional Big Box distribution and logistics.
- The emergence of a two tier market of industrial property comprising of grade A and grade B stock and occupiers becoming ever more aware of the benefits of newer grade A stock.
- The demand from occupiers for ever more flexible leasing structures to cope with market volatility and the increase in contract led workloads.
- Technological advances resulting in manufacturing companies being able to downsize the amount of space that they actually require
- A fall in demand from owner occupiers purchasing their own premises, as a result of the lack of bank lending and market uncertainties.
- The increase in the availability of multi modal and rail freight distribution opportunities.

All of the above factors are continuing to change the nature of the industrial markets across the UK. Some are brought about by changes in economical terms and others due to changes in technology and infrastructure. Some industries will continue to decline and others will grow, though what is certain is that there will be an element of mismatch between the property vacated by one declining sector and that required by another emerging sector. As a result it is highly likely that the issue of older buildings that are becoming obsolete both functionally and economically, is only set to grow.

3.3 Market Sectors and Site Characteristics

There are four broad types of industrial uses and each of these has some fairly specific site requirements in order to function and operate efficiently. Whilst there is often some overlap, these can be broadly categorised as follows:

- **Research and Development** – requires a high quality site with good proximity to Universities and or research centre.
- **Light Manufacturing** – Good quality site with prominence and visibility, routes to market and accessibility.
- **Heavy Manufacturing** – often larger sites of lower environmental quality, without noise/pollution restrictions and good accessibility.
- **Warehousing and Distribution** – good road links and proximity to large centres of population within minimum drive times.

3.4 Powys' Industrial Market

The industrial property portfolio in Powys predominantly comprises a range of light industrial buildings and workshops that were originally developed in the mid 1980's by the Development Board for Rural Wales and the Welsh Development Agency. There has been some more recent development undertaken by Welsh Government, though this has been on a far smaller scale. There is generally a good range of accommodation which is well occupied and the County as a whole seems to have been quite resilient to the more challenging economic climate over the past couple of years. Anecdotal evidence suggests that this is partly due to the lack of reliance on large companies and employers and so the County has been largely insulated from the

shocks of big closures. Also due to the relatively subdued level of market activity, the property market did not get over heated in the mid 2000's as it did in other parts of the country and it has not therefore experienced the same imbalances between supply and demand seen in other parts of the country.

Many of the commentators and stakeholders spoken to commented on the fact that much of the current stock was developed some twenty years ago and whilst it is still fit for purpose, it is ageing and there will come a time, arguably in the next ten to fifteen years where it might start to become obsolete and will at best require higher levels of maintenance and investment in order to keep it fit for purpose. Apart from the general issue of the stock getting older, specific issues raised included the lack of prestige an older building has against a new building, a lack of height in some buildings, a lack of circulation space and parking for some buildings and a lack of thermal properties and increased occupational costs for some buildings.

One of the main reasons for the ageing stock is the lack of private investment and development in the County. Almost without exception the existing supply has been provided in one form or another through the public sector and even during the recent property boom, private sector investment and development were not achieved. Due to the large differential between cost and value, this is not a problem that we see diminishing and if anything the problem might increase as property investors and developers look for ever more certain markets, such as proximity to motorways and major cities.

As mentioned in the introduction, there is not a great deal of hard data available for the County in terms of take up and supply, though during our inspections, it was noted that generally most estates seemed to be well occupied and voids do not seem to be a large problem. We have been told that the portfolio owned by Powys County Council is running at an occupancy rate of about 90% and this is very good for such a diverse portfolio. We were also told that the portfolio owned by Welsh Government is running at about 80% occupancy and whilst this is also quite good given the current economic conditions, the difference might be partly explained by the fact that the WG portfolio is predominantly newer and the rental levels being sought are higher.

Due to the relatively large size of the County and the lack of recorded data, it is difficult to be too specific about values. The general view however is that values have held up well across the County for both freehold and leasehold properties since the downturn began in 2007/8. Typical rental values for units of less than 5,000 sqft / 465 sqm were around £4.00/£4.50 per sqft in 2007 are now in the region of £3.50/£4.00 per sqft. Freehold values for the same units were around £40.00/£50.00 per sqft in 2007 are now in the region of £30.00/£40.00 per sqft. There is little evidence for larger units due to the restricted market place, though current rental levels for larger units would seem to be around £2.00/£2.50 per sqft and capital values for the same properties are around £20.00/£25.00 per sqft

3.5 Land Take Up in Powys

We have not been able to obtain any recorded data relating to the level of take up of commercial land in Powys for any one particular year. Anecdotal evidence does however suggest that there is a demand for land and that this remains fairly constant over time. Following consultations with various stakeholders the following anecdotal evidence was obtained:

- The typical annual take up is in the region of 3 – 5 acres / 1.2 – 2 ha per year.
- The typical demand is for plots of between 0.25 and 1 acre / 0.1 – 0.4 ha.
- The greatest demand is in and around the towns of **Ystradgynlais, Brecon, Newtown and Welshpool.**

3.6 Property Availability & Demand

Table's 3.1 and **3.2** below summarise the levels of availability and enquiries for industrial property in Powys and Mid Wales for the period 1st April 2010 to 31st March 2011. This information has been obtained from the Welsh Property Database and is the only collected and recorded information that we have been able to find relating to availability and demand. The information on availability is collected by Welsh Government and it reflects the information submitted to them by owners, agents and other stakeholders marketing empty properties. The information on demand is a record of the number of people searching the database for available property. It should be noted that some of these might not have been actual potential occupiers looking for a specific property and that there are other potential occupiers who do not use the database and so are not recorded. As above, the Mid Wales area includes Ceredigion, Powys and Gwynedd.

Table 3.1 – Industrial Availability

Unit Size	Powys	Mid Wales
0 – 5,000 Sq Ft (0 – 465 sqm)	29	53
5,000 – 10,000 Sq Ft (465 – 930 sqm)	9	12
10,000 – 15,000 Sq Ft (930 – 1395 sqm)	2	3
15,000 – 20,000 Sq Ft (1395 – 1859 sqm)	2	3
20,000 – 25,000 Sq Ft (1859 – 2323 sqm)	1	1
25,000 – 50,000 Sq Ft (2323 – 4645 sqm)	1	1
50,000 – 100,000 Sq Ft (4645 – 9290 sqm)	0	1
100,000 plus (9290 + sqm)	0	0

Table 3.2 – Industrial Enquiries

Unit Size	Powys	Mid Wales
General Searches	25	81
0 – 5,000 Sq Ft (0 – 465 sqm)	12	20
5,000 – 10,000 Sq Ft (465 – 930 sqm)	3	8
10,000 – 15,000 Sq Ft (930 – 1395 sqm)	2	7
15,000 – 20,000 Sq Ft (1395 – 1859 sqm)	3	7
20,000 – 25,000 Sq Ft (1859 – 2323 sqm)	2	3
25,000 – 50,000 Sq Ft (2323 – 4645 sqm)	3	4
50,000 – 100,000 Sq Ft (4645 – 9290 sqm)	0	6
100,000 plus (9290 + sqm)	1	11

3.7 Conclusion

Powys has a good supply of industrial property that is suitable for a wide range of purposes and applications and it is well spread geographically across the County. It ranges from the smaller and more flexible units provided by Powys County Council, a good supply of mid size ex DBRW/WDA units now primarily in private ownership and some more modern units developed and owned by Welsh Government. There would generally seem to be an adequate supply of property, though indications are that there is a potential shortage in Ystradgynlais, Brecon and Welshpool. The majority of demand would seem to be for smaller units of sub 5,000 sqft. The greatest threats that we would see for the County are the potential lack of suitable grow on space for small business looking to expand from some of Powys Council's smaller units, the often somewhat isolated locations of the units and the difficult routes to market and finally the ageing nature of the stock originally developed by DBRW and the WDA.

4 EXISTING PORFOLIO

While work is now progressing on the Local Development Plan (LDP) for Powys, the Unitary Development Plan (UDP) remains the statutory development plan in force in the County. It is therefore the employment allocations made within the UDP that form the basis of this section of the report which provides a review of the current supply of employment sites in Powys.

The information contained within the UDP has been supplemented by further desk and site based research / evaluation in order to better assess the current suitability and future viability of the existing supply.

4.1 Unitary Development Plan Allocations

The Powys County Council UDP allocated a total of **54.5 ha** of which **33.8 ha** were in identified key employment locations and **20.7 ha** was allocated as general sites to give support to other settlements. In addition to this prescribed allocation the UDP also allocates Local employment sites which had a total land area of **20.64 ha**.

We therefore calculate the UDP baseline position in terms of the total amount of employment land allocated at 75.14 ha.

In addition to the above the UDP allocated a site specifically for a meat processing plant (19 ha) with the objective of attracting a specific investor that was looking for a site at the time of drafting the plan. Including this additional 19 ha site the UDP allocated a total of **94.14 ha** of employment land. The meat processing site was not a general employment allocation and has not been developed, but has a significant influence due to its scale on the analysis of employment land allocations for the County, skewing the picture for general employment allocations. For the purpose of the remainder of this analysis the site has not been included as part of the original portfolio UDP employment sites

The baseline employment land supply is therefore 75.14 ha.

The information contained in **Table 4.1** provides the total site areas of UDP employment land allocations. Alongside this, it presents a figure for the amount of developable land left at each allocation which has been calculated through both desk based review and site work to confirm any build out. In total the data suggests **64.31 ha** of employment land available for development. It is fair to say that County continues to have an extensive and available allocation of employment land.

Table 4.1 – UDP Allocations & Remaining Developable Land

UDP Ref	Site Name	Settlement Name	Site Area (ha)	Remaining Developable Land (ha)
B34 EA1	Woodlands Business Park	Ystradgynlais	2.10	1.06
B32 EA2	Cae'r-bont	Ystradgynlais	1.50	1.50
B32 EA1	Penrhos	Ystradgynlais	1.00	0.00
B34 EA2	Ynyscedwyn	Ystradgynlais	0.70	0.70
B26 EA1	Javel Industrial Estate	Three Cocks	0.60	0.60
R69 EA1	Wyeside Enterprise Park	Builth Wells	2.50	2.16
R77 EA1	Newbridge-on-Wye	Newbridge-on-Wye	0.50	0.50
R46 EA1	Crossgates	Crossgates	0.60	0.60
R66 EA1	Heart of Wales Business Park	Llandrindod Wells	4.90	4.57
R66 EA2	Ddole Road	Llandrindod Wells	4.00	4.00
R66 EA3	Llandrindod Wells	Llandrindod Wells	0.57	0.00
R66 EA4	Llandrindod Wells	Llandrindod Wells	1.12	1.12
R84 EA1	Broadaxe Business Park	Presteigne	4.40	3.18
R85 EA1	Brynberth Enterprise Park	Rhayader	3.80	3.80
R59 EA1	Knighton	Knighton	0.90	0.90
R59 EA2	Knighton Enterprise Park	Knighton	1.10	0.44
R61 EA1	Knucklas	Knucklas	0.50	0.50
B23 EA1	Llanwrtyd Wells	Llanwrtyd Wells	0.38	0.38
M160 EA1	Llangurig	Llangurig	0.40	0.40
M163 EA1	Great Oaks Business Park	Llanidloes	1.80	0.30
M163 EA3	Parc Hafren	Llanidloes	2.30	1.47
M163 EA2	Parc Hafren Extension	Llanidloes	3.00	3.00
M182 EA2	Llanidloes Road	Newtown	4.20	4.20
M181 EA1	St Giles	Newtown	7.30	7.30
M189 EA1	Sarn	Newtown	0.46	0.46
M101 EA1	Abermule Business Park	Abermule	2.60	2.60
M117 EA1	Churchstoke	Churchstoke	1.54	1.54
M176 EA1	Montgomery	Montgomery	1.60	1.60
M199 EA2	Buttington Cross Enterprise Park	Welshpool	3.90	1.50
M195 EA1	Trewern	Trewern	1.43	1.43
M199 EA1	Offa's Dyke Business Park	Welshpool	8.20	7.80
M133 EA1	Four Crosses	Four Crosses	1.00	0.75
M165 EA1	Wynnstay Stores	Llansanffraid ym Mechain	1.60	1.60
M157 EA1	Llanfyllin Enterprise Park	Llanfyllin	0.28	0.28
M186 EA1	Pontrobert	Pontrobert	0.12	0.12
M153 EA1	Llanerfyl	Llanerfyl	0.44	0.15
M184 EA1	Penybontfawr	Penybontfawr	0.50	0.50
M172 EA1	Treowain Enterprise Park	Machynlleth	1.30	1.30
		TOTAL	75.14	64.31

While recorded take-up rates are not available from Powys CC data, analysis of the above information allows an estimates take-up or build-out rate to be established. The rate over the plan period to date (2001 – 2016) has been in the region of **1.0 ha per annum**. This figure broadly reflects estimated latent demand for Powys reported in the Mid Wales Employment Land Strategy (2001) as being 0.5 – 0.75 ha per annum and is in line with land take up suggested through the analysis of market trends Database and presented in **Section 3.5** above.

4.2 Employment Allocations by Settlement / Area

The following tables seek to explore the current supply of employment land (allocations) by settlement and broad spatial area.

For the purposes of this analysis and for the demand profiling we have split the County into four main spatial areas. This exercise was undertaken through analysis of existing spatial planning documents for the County, including the Wales Spatial Plan, Powys UDP and Regeneration Strategy, as well as review of the employment market in the area and consideration of the main economic drivers and geographic linkages of the various settlements in the County. The four spatial areas developed include:

- Ystradgynlais
- Central Powys
- Machynlleth
- Severn Valley & the North

These broad spatial areas are illustrated on **Figure 5.1** and are considered to reflect the general distribution of allocations as well as the economic connections and relationships that different areas of the County have with their neighbours. For the purposes of this study the area of the Brecon Beacons National Park Authority has been excluded and a separate study is due to be commissioned for that geographic area.

Table 4.2 – Allocated Sites & Undeveloped Allocations by Settlement

Settlement	Land Allocated in UDP (ha)	Undeveloped Allocations	Developed During Plan Period
Ystradgynlais	5.30	3.26	2.04
Builth Wells	2.50	2.16	0.34
Llandrindod Wells	10.59	9.69	0.90
Rhayader	3.80	3.80	0.00
Llanidloes	7.10	4.77	2.33
Newtown	14.56	14.56	0.00
Machynlleth	1.30	1.30	0.00
Welshpool	12.10	9.30	2.80
Three Cocks	0.60	0.60	0.00
Newbridge-on-Wye	0.50	0.50	0.00
Crossgates	0.60	0.60	0.00
Presteigne	4.40	3.18	1.22
Knighton	2.00	1.34	0.66
Knucklas	0.50	0.50	0.00
Llanwrtyd Wells	0.38	0.38	0.00

Llangurig	0.40	0.40	0.00
Churchstoke	1.54	1.54	0.00
Montgomery	1.60	1.60	0.00
Trewern	1.43	1.43	0.00
Four Crosses	1.00	0.75	0.25
Llanfyllin	0.28	0.28	0.00
Pontrobert	0.12	0.12	0.00
Llanerfyl	0.44	0.15	0.29
Penybontfawr	0.50	0.50	0.00
Llansanffraid ym Mechain	1.60	1.60	0.00
TOTAL	75.14	64.31	10.83

* Undeveloped calculations are based on a review of allocations on site and subsequent measurement of remaining undeveloped areas of UDP allocations.

In terms of concentrations of employment allocations the data in [Table 4.2](#) shows the majority (57%) of employment land to be around five settlements of Ystradgynlais, Llandrindod Wells, Llanidloes, Newtown and Welshpool.

When looking at the undeveloped or remaining employment land allocations the data reveals approximately **64.31 ha** of undeveloped employment land. The majority of this land is focussed around the settlements of Llandrindod Wells, Newtown, Welshpool, Ystradgynlais, Llanidloes and Presteigne.

When looking at development that has occurred on allocations during the plan period our work suggests an overall limited level of development which has been focussed around the settlements of Ystradgynlais, Llanidloes, Welshpool and Presteigne.

Condensing the above settlement specific data into the developed spatial clusters set out above shows trends presented in [Table 4.3](#) below.

Table 4.3 – Allocated Sites & Undeveloped Allocations by Spatial Area

Spatial Area	Land Allocated in UDP (ha)	Undeveloped Allocations	Developed During Plan Period	% Developed
Ystradgynlais	5.30	3.26	2.04	38.5%
Central Powys	26.27	23.15	3.12	11.9%
Machynlleth	1.30	1.30	0.00	0.0%
Severn Valley & North	42.27	36.60	5.67	13.4%
TOTAL	75.14	64.31	10.83	14.4%

* Undeveloped calculations are based on a review of allocations on site and subsequent measurement of remaining undeveloped areas of UDP allocations.

This data shows a focus of employment land allocations in the Central Powys and Severn Valley and the North clusters, reflecting both the geographic scale of these areas and the presence of County's major settlements. The data also shows that most development (ha developed) during the plan period has occurred in the Severn Valley area (**5.52 ha**) however this area's had the largest allocation of land and therefore proportionately the greatest level of development has occurred in Ystradgynlais which has seen **38.5%** of its allocation built out compared to **13.1%** in the Severn Valley. Central Powys has also seen **11.9%** of its allocation built out during the same period.

4.3 Employment Property by Use Class

Data on the mix of use classes on the allocated sites within the County was not available from Powys CC and while the site work completed as part of the study did not seek to provide a detailed use class break down. However, the following commentary was established from observations on site.

The current stock of employment accommodation on allocated sites in the County is predominately of the B2 and B8 uses. B1 uses are mainly focussed on the smaller employment sites which appear to be serving the local area in which they are located. This observation reflects the fact that the majority of office stock within the County is either of small scale, serving local need or is located in the main town centres such as Newtown, Welshpool and Llandrindod Wells.

A detailed survey of property by use class could be undertaken as part of a future monitoring of employment supply within the County.

4.4 Undeveloped Allocations by Category

The overall allocation is split into that various categories as set within the UDP. These include:

- **Premium Sites** – Brought forward to attract inward investment and regional expansion.
- **Regional Sites** – Capable of satisfying both expansion and new investment requirements.
- **Special Sites** – Brought forward to serve centres of excellence.
- **General Sites** – Extensions to existing employment sites or in new locations relating well to settlement patterns; and
- **Local Sites** – Designed to support locally generated small-scale demand.

The split of allocations within the above hierarchy is shown in [Table 4.4](#) below.

Table 4.4 – Allocation Category

Allocation	Land Allocated in UDP (ha)	Remaining	Developed
Premium	7.30	7.30	0.00
Regional	17.30	16.57	0.73
Special	1.30	1.30	0.00
General	28.60	22.77	5.83
Local	20.64	16.37	4.27
TOTAL	75.14	64.31	10.83

The figures in [Table 4.4](#) show the highest demand over the plan period has been for general and local employment land with **5.83** and **4.12** hectares having been developed respectively. While no development has been recorded on the sites allocated as Premium or Special it must be recognised that this relates to two individual sites which have not come forward over the plan period.

The table highlights that the County's current employment allocation is focussed on general and local sites with 93% of development over the plan period having occurred on these allocations. The remaining 7% of development has occurred on Regional allocations. Of the remaining employment allocation, **Table 4.5** highlights the category of the remaining allocation as a percentage of the overall remaining land.

Table 4.5 – Allocation Category as a % of Remaining Land

Allocation	Land Remaining
Total	64.31
Premium	11.4%
Regional	25.8%
Special	2.0%
General	35.4%
Local	25.5%

The data clearly shows that of the **64.31 ha** of undeveloped land allocated for employment, approximately **35%** is allocated for general employment use. Local sites account for **25.5%** while regional sites account for **25.8%**. The land allocated for premium employment uses (**11.4%**) reflects the one site originally allocated for this use, St Giles in Newtown. No part of this site has planning consent and therefore remains an undeveloped allocation. The land allocated for special uses (**2.0%**) also reflects the original single allocation on the Treowain in Machynlleth.

4.5 Allocation by Recommended Category

In order to ensure appropriate allocations going forward we have grouped the remaining allocations into four new categories which we feel better reflect the nature of the sites and the potential of future uses. We consider these categories reflect best practice and current thinking being used in adjoining authorities. For future allocations within the LDP we recommend a new categorisation which no longer uses 'premium' and special' and introduces a lower level 'neighbourhood' category. The four recommended categories include:

Prestige Sites: Strategically located sites in the regional context offering medium to large scale employment opportunities and characterised by a high quality environment.

High Quality Sites: Smaller sites of regional significance offering small to medium sized employment opportunities in high quality surroundings that are well positioned in relation to the County's main road and transport infrastructure.

Local Sites: Sites providing a varied industrial / employment image yet located within close proximity to the main road and transport infrastructure as well as centres of population. These sites primarily serve a local market and may include local office developments.

Neighbourhood Sites: Typically situated in the smaller rural communities and suited to a local operation.

When looking at specific uses it can be said that the prestige sites are for medium to large scale, high quality employment uses that fall primarily within class B1. High quality and local sites are allocated for general industrial / employment uses within classes B1, B2 and B8. Neighbourhood sites are allocated for small, light industry that would largely fall within use class B1 but may include B2.

Table 4.6 below details the remaining employment allocation (**55.41 ha**) by the new categories. This figure is taken from Table 5.3.2 in Section 5 and accounts for sites which this report recommends for disposal / other uses.

Table 4.6 – Remaining Allocation by Proposed Category

Category	Land Remaining (ha)	No. Sites
Prestige	13.87	4
High Quality	15.62	7
Local	23.37	18
Neighbourhood	2.55	7
TOTAL	55.41	36

5 SUPPLY ANALYSIS

5.1 Existing Supply

The following section gives a brief overview of the existing employment sites in Powys, detailing the number of units on each site, summarising the condition and the relationship the units have with the surrounding environs. Copies of the detailed site proformas which were compiled to record site and desk based observations can be found in [Appendix A](#) with site plans also included. These plans have been completed for all sites and seek to illustrate remaining developable land within the allocation and / or potential expansion areas outside of original allocations. Where relevant each plan therefore illustrates the current allocation (red line) and / or available developable land / suggested expansion areas (blue line).

For the purposes of this analysis the current supply has been presented and evaluated under a number of key geographic areas (not including BBNPA). These areas have been developed based on policy and economic drivers and are considered to reflect the geographic and economic influences on the County and the relationships that certain areas have with adjoining geographies. These areas are shown on [Figure 5.1](#) and include:

- Ystradgynlais
- Central Powys
- Severn Valley
- Machynlleth

Sites within each of these areas have been evaluated against various criteria and a recommendation in terms of future actions for each site has been established. A definition of these recommendations is included in [Table 5.1.1](#) below:

Table 5.1.1 – Recommendation Definitions

Recommendation	Suggested Actions
1. Disposal / Change of Use	Explore opportunities to change the sites allocation with the potential to redevelop for other uses more akin to the needs of the locality or seek to bring forward the allocation as part of a mixed use development to ensure economic viability.
2. Retain as is	Retain the site / allocation for economic/ employment use.
3. Retain and redevelop / regenerate	Retain the site for economic/ employment use with some investment in the site / premises. This may include the redevelopment / reconfiguration of units to bring them in line with demand and / or improvements to public space.
4. Retain and promote expansion.	Retain the site for economic/ employment use, redeveloping units where necessary and seeking to expand the employment allocation, helping to meet future economic needs and facilitate future investment.

Commentary on the existing allocations / business parks and industrial estates within each of these clusters is provided below with recommendations summarised and presented in [Section 5.5](#).

5.2 Allocated Portfolio (Within UDP)

5.2.1 Ystradgynlais Cluster

1. Woodlands Business Park, Ystradgynlais (B34 EA1) (General Employment Site)

Woodlands Business Park is one of the largest employment sites in Ystradgynlais, as there are 16 units on the site, with only one unoccupied unit.

The current stock ranges in appearance, as some are more modern than others. The general condition of the units is generally good however, as the units are well maintained and situated in landscape environs.

Access to the site is varied, as the site is located just off the Gurnos Roundabout, which connects Ystradgynlais to surrounding settlements via the A4067. In contrast, access to the site via rail is poor, as there is no rail station within close proximity.

A large Tesco store has recently opened to the east of the site. This development includes provision of some employment units which are yet to be built. With this in mind, Woodlands Business Park currently has a number of vacant pieces of land which would be able to accommodate further business units.

Recommendation	4
It is recommended that the site be prioritised for further development. The park's existing occupancy levels highlight the site's demand as an employment site and it is therefore suggested that the parks surplus land be developed for further expansion.	
Opportunities	<ul style="list-style-type: none">- Good Accessibility via Road (A4067)- High Occupancy Levels- Land available for future development / expansion
Constraints	Poor Rail Access

2. Cae'r-bont Enterprise Park, Ystradgynlais (B32 EA2) (Local Employment Site)

The current stock on the Cae'r-bont enterprise park requires some investment. Many of the units require modernisation, as they are old and dated in appearance. Despite this, the site's environs are well maintained, as grass verges appear to be regularly cut whilst landscaped bedding and trees are located throughout.

Accessing the site is difficult, as the units are located some distance from the main settlement of Ystradgynlais, whilst there is no local train station.

Currently, of the 8 units, 6 are vacant suggesting that the site would benefit from maintenance works, potentially re-designing the site to accommodate larger businesses.

Recommendation	3
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It is recommended that the site be prioritised for regeneration, re-designing the existing units to match the area's current demand and improve current occupancy rates.	
Opportunities	- Well maintained site environs.
Constraints	- High levels of vacant floorspace - Poor accessibility - Ageing stock

3. Penrhos Business Park, Ystradgynlais (B32 EA1) (Local Employment Site)

The site allocated in the UDP at Penrhos is currently being developed for a new coeducational English medium community primary school. This change of use on the site leads to a loss of 1 hectare of allocated employment land and should be considered when assessing existing supply in order to calculate demand.

Recommendation	1
This site is currently being developed for an education use and is therefore unavailable for employment use.	
Opportunities	N/A
Constraints	N/A

4. Ynyscedwyn, Ystradgynlais (B34 EA2) (Local Employment Site)

Ynyscedwyn is a large employment site consisting of 21 units, 6 of which are currently vacant. The site has a range of uses, including B1, B8, A1, D1, etc, however there is no one dominant use.

The existing stock is ageing somewhat, becoming scruffy in appearance however the units are well maintained and in a good state of repair. In addition, the surrounding environs and open spaces have some soft landscaping features, comprising small trees and plants. Surplus development land on the site is at a premium, as the enterprise park has a high density.

Gaining access to the site is good, as the site is easily accessible via the A4067, whilst there are a number of bus stops in walking distance of the site located on College Row.

Recommendation	2
It is recommended that the site be retained as an employment site and does not require any further investment at this stage. The site has limited developable land and the vacancy rate is low.	
Opportunities	- Good accessibility via the A4067 and connected by local bus services. - Central location close to town centre and other employment sites.

Constraints	<ul style="list-style-type: none"> - Limited land available for future expansion. - Units appear fairly old and may need some updating going forward.
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5.2.2 Central Powys Cluster

2. Javel Industrial Estate, Three Cocks (B26 EA1) (Local Employment Site)

Located just off the main A438 through Three Cocks and adjacent to the Three Cocks Industrial Estate the Javel provides 6 small workshop units and has an oil depot to the west. The workshop units currently house a mixture of B1 and B8 uses and the estate has 1 or 2 vacancies.

The allocation is currently undeveloped and therefore the estate offers potential expansion going forward. The mix of uses on the site, some of which are not traditional uses for such a location would suggest low demand in the area.

Recommendation	3
It is recommended that the site be retained as an employment site and undergoes some investment in terms of unit size and condition to meet local demand.	
Opportunities	<ul style="list-style-type: none"> - Good accessibility via the A438 and connected by local bus services. - Site allocation remains available for future expansion.
Constraints	<ul style="list-style-type: none"> - Currently some vacancies on site with a variety of uses. - Uses lower the overall perception of the Estate.

3. Wyese Enterprise Park, Builth Wells (R69 EA1) (General Employment Site)

Wyese is located off the A481 and provides a high quality employment site with potential for expansion and infrastructure in place. The site currently provides 3 premises, 1 of which is vacant and contains both B2 and B8 uses.

While the vacancy and potential expansion land exists there were no visible signs of marketing on the site which is well connected by road and has a pedestrian / cycle path running into Builth Wells. Site infrastructure and general environmental quality is good and it is recommended that the site be prioritised for future development.

Recommendation	4
It is recommended that the site be prioritised for future employment provision / expansion, actively marketing the vacant unit and seeking to develop further employment uses on the site.	
Opportunities	<ul style="list-style-type: none"> - Site infrastructure and environmental quality are good. - Large areas of potential expansion land which have infrastructure in place.

	- Site is well connected for foot / cycle access from Builth Wells.
Constraints	- Site has poor accessibility by public transport. - Large nature of the vacant unit limits potential future occupiers.

5. Newbridge-on-Wye (R77 EA1) (Local Employment Site)

This allocation remains undeveloped and available for future employment uses. The site has a strong strategic position on the A470 and offers potential to meet local need going forward.

Recommendation	2
It is recommended that the allocation remains in order to provide employment land to meet local needs in this area of the County.	
Opportunities	- Allocation offers potential for small scale employment uses to meet local need. - Site is located along the main A470 and therefore offers good road access / infrastructure.
Constraints	- Site is quite heavily vegetated and therefore requires large amounts of site preparation / clearance. - Access to the site may be a constraint due to the nature of the A470 which passes the site.

6. Crossgates (R46 EA1) (Local Employment Site)

Located on the outskirts of Crossgates, off the A44 this employment allocation remains undeveloped. Adjacent uses include a large service station and bus storage area and it is therefore considered that the site remains appropriate as an employment allocation.

Recommendation	2
It is recommended that the allocation be retained in order that opportunities for the development of employment space to meet local requirements is maintained.	
Opportunities	- Good access via A44 and good linkages to both bus and train services. - Site appears relatively unconstrained in terms of future development. - Employment uses would not impact negatively on surrounding land uses.
Constraints	- Site is fairly isolated in terms of foot access with no formal pedestrian access.

7. Heart of Wales Business Park, Llandrindod Wells (R66 EA1) (Regional Employment Site)

The Heart of Wales Business Park is a high quality employment site. The park is approximately 1 mile from Llandrindod Wells town centre and is easily accessible from the A483. The current

stock is modern and is complemented by environmental landscaping, including well maintained grass verges, flower beds and tree saplings.

Currently, there are 3 moderately sized units on site, 1 of which is currently unoccupied; however there are a number of marketing signs promoting the vacant space. In addition to the current stock, there are a number of vacant patches of open spaces, which could be utilised to expand the site. It is clear that future expansion was considered during the initial design of the park, as the plots already have access.

Recommendation	4
It is recommended that the site be prioritised for future expansion. Due to the site's current stock and available developable land, the site would benefit from further growth and would potentially help to attract further investment to Llandrindod Wells.	
Opportunities	<ul style="list-style-type: none"> - Good access via A483 - Modern business units set within an attractive environment - Substantial land available for expansion
Constraints	<ul style="list-style-type: none"> - Site on the border of a broadband slow spot

8. Ddole Road, Llandrindod Wells (R66 EA2) (General Employment Site)

Ddole Road Business Park is a large employment site, and is currently well occupied. It appears that some areas of the site have recently undergone redevelopment as there are a number of large modern industrial units occupying land north of the site, which are utilising sustainable forms of energy provision, including implementing a large wind turbine. In addition to the recent expansion, there are a number of large vacant plots which could be developed further.

There are approximately 36 units on site, which vary in size and use class (B1, B2, B8, D1, sui-generis, etc). Although occupancy rates are high, there are a number of vacant units, predominately the smaller workshops.

The site is approximately 1 mile from Llandrindod Well's town centre and is well sourced by transport nodes, including Llandrindod Railway Station which is also a mile away.

Recommendation	3
It is recommended that some units on site should be redeveloped to reflect the demand for the area. This may include converting the smaller workshop units be into larger business units to cater for larger enterprises.	
Opportunities	<ul style="list-style-type: none"> - Good access via A483 - In close proximity to Llandrindod Rail Station - Modern units, some of which are harnessing renewable energy - Substantial land available for future expansion
Constraints	<ul style="list-style-type: none"> - Site partially within flood zone - Categorised as a broadband slow-spot

9. Llandrindod Wells (R66 EA3) (Local Employment Site)

This allocated site is located next to an existing business park which houses a range of industrial units. The site is easily accessible via the A483, as the plot runs parallel to the road and has been developed as a recycling bring site.

Recommendation	1
The site has been developed as a recycling site and it is considered offers no further potential for employment development and does therefore not offer potential for future allocations.	
Opportunities	N/A
Constraints	Site offers limited opportunities for further employment development as it has been developed out for a recycling site.

10. Llandrindod Wells (R66 EA4) (Local Employment Site)

This vacant, allocated but undeveloped site is located on land adjoining an existing industrial park. The site is easily accessible and would form a natural extension to the existing site.

Recommendation	4
It is recommended that the site be prioritised for development. The site's location, accessibility and existing infrastructure means's the plot would be well suited as a business park and would form a natural extension to the existing park.	
Opportunities	<ul style="list-style-type: none"> - Located adjacent to an existing business park - Business infrastructure is already in place. - Easily accessible via the A483 and Llandrindod Rail Station.
Constraints	<ul style="list-style-type: none"> - Overgrown and would require clearing

12. Broadaxe Business Park, Presteigne (R84 EA1) (General Employment Site)

Broadaxe Business Park lies to the south of the Presteigne Industrial Estate. The site currently contains a number of larger scale units used for B8 uses as well as some office development. The allocation has a large area of undeveloped land which offers potential for future employment related development.

The park's market viability is good, as the site is easily accessible from the B4355, whilst there are a number of bus stops located along this stretch.

Recommendation	2
It is recommended that the site be retained as an employment site and expansion should be encouraged on the developable land still available within the UDP allocation.	
Opportunities	<ul style="list-style-type: none"> - Good access via B4355 - Vacant land available if future demand arises.

Constraints	- Site borders the flood zone
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13. Brynberth Enterprise Park, Rhayader (R85 EA1) (General Employment Site)

Located on the outskirts of Rhayader this site offers a variety of units of varying age and quality. The site also offers potential expansion opportunities with basic infrastructure in place to expansion sites.

Current uses on site include both B2 and B8 alongside some sui generis and retail uses. Of the 11 units on site 5 appeared to be vacant at the time of the survey. Some of the current stock appears in need of regeneration / refurbishment while the potential expansion sites appear relatively unconstrained.

Recommendation	3
It is recommended that this site is retained, regenerated and expanded where future uses are identified.	
Opportunities	<ul style="list-style-type: none"> - Strategic location with expansion opportunities - Site infrastructure in place for future expansion.
Constraints	<ul style="list-style-type: none"> - Some units appear aged and in poor quality. - Vacancy rates at present suggest limited demand.

15. Knighton (R59 EA1) (Local Employment Site)

This allocation is located on the western edge of Knighton just off the A488 Penybont Road. The site remains undeveloped, however provides a development opportunity in an edge of settlement location, adjacent to an existing employment use.

Recommendation	2
It is recommended that this allocation is retained in order to provide investment / development opportunities within Knighton going forward. This recommendation reflects the occupancy of the Knighton Enterprise Park and the limited expansion opportunities identified there.	
Opportunities	<ul style="list-style-type: none"> - Site on settlement boundary and adjacent to existing employment use. - Site located along main A488 - Close to residential population.
Constraints	<ul style="list-style-type: none"> - Access may require upgrading in order to meet required standards - Part of the site is at risk of flooding.

16. Knighton Enterprise Park, Knighton (R59 EA2) (Local Employment Site)

Knighton Enterprise Park is a small, modern business park. The site consist of 3 moderately sized units, of which there are no vacancies. The predominant use for the site is B1, including offices and light industry. The site is easily accessible via the A4113, whilst Knighton Rail Station is within walking distance.

The current stock is in good condition. The units are modern in appearance whilst the surrounding environs are well maintained with some landscaping.

Recommendation	2
It is recommended that the site be retained as employment land, as the site has good market viability and is currently fully utilised. Due to the lack of developable land, it is suggest that no additional investment is required for the site.	
Opportunities	<ul style="list-style-type: none"> - Modern business units - Well maintained environs - Good access from A4113 & Knighton Rail Station - High occupancy levels
Constraints	<ul style="list-style-type: none"> - Limited land available for expansion

17. Knucklas (R61 EA1) (Local Employment Site)

This allocation remains undeveloped. Recent activity in the surrounding area has been largely residential development and it is considered that release of the site for other uses should be explored. This could include progression as a future housing site, a natural extension to the adjacent development, or a small mixed use scheme with housing and small workshop units.

Recommendation	1
Due to the surrounding uses it is recommended that this site be considered for other uses, potentially releasing the site to expand the adjacent residential scheme.	
Opportunities	<ul style="list-style-type: none"> - Natural extension to adjacent residential development - Good accessibility due to road network and adjacent railway station.
Constraints	<ul style="list-style-type: none"> - Adjacent development (residential) would restrict the end uses of any future employment site.

18. Llanwrtyd Wells (B23 EA1) (Local Employment Site)

Located on the outskirts of Llanwrtyd Wells this small scale employment site and allocation serves very much a local need. Currently offering two premises, one remains vacant and the building would generally benefit from some update / regeneration.

The current allocation seeks to extend the site and appears to have limited constraints for future expansion.

Recommendation	2
It is recommended that the site be retained as a small employment site and employment allocation. The current buildings appear in a fair condition, although may need updating dependant on final use.	
Opportunities	<ul style="list-style-type: none"> - Ideal site for potential expansion to provide local employment premises. - Site positioned within attractive natural surroundings and is easily accessible.
Constraints	<ul style="list-style-type: none"> - Current premises require some updating / regeneration. - Location limits market to local requirements.

5.2.3 Severn Valley Cluster

1. Llangurig (M160 EA1) (Local Employment Site)

Located on the settlement edge of Llangurig this undeveloped allocation provides a good opportunity for employment provision to meet local need. Due to location however, it is considered unlikely that development will progress purely on an employment basis.

Recommendation	2
It is recommended that the site be retained as an employment allocation. However it is considered unlikely development will come forward unless part of a wider development.	
Opportunities	<ul style="list-style-type: none"> - Site appears fairly unconstrained, although it is Greenfield in nature. - High quality natural surroundings.
Constraints	<ul style="list-style-type: none"> - Large site set within a low density residential area. - Access achieved along a fairly narrow road. - Greenfield site.

2. Great Oaks Business Park, Llanidloes (M162 EA1) (Local Employment Site)

Located to the north of Llanidloes the Great Oaks offers high quality, modern employment space with good access to the A470 and set within a high quality environment. The site has some signs of renewable technologies and contains a variety of B1 uses. Land allocation / future expansion areas appear relatively unconstrained.

Recommendation	4
It is recommended that the site be retained and promoted to accommodate future employment uses. The site has been successful in attracting high quality employment uses and should be expanded.	
Opportunities	<ul style="list-style-type: none"> - Site is fully occupied and offers potential expansion.

	<ul style="list-style-type: none"> - Site offers a high quality environment with good access to the A470 and into Llanidloes. - Potential to establish a cluster of technology / energy based businesses.
Constraints	<ul style="list-style-type: none"> - Very few obvious constraints to future expansion.

3. Parc Hafren, Llanidloes (M163 EA3) (General Employment Site)

Located to the south of Llanidloes with direct access onto the A470, this employment site currently comprises of 4 units, 1 of which appears to be vacant. The site houses both B2 and B8 uses. A number of potential expansion areas exist and are serviced with basic infrastructure.

Recommendation	4
It is recommended that the site be retained and promoted to accommodate future employment uses. The site is currently considered to be underutilised and has a number of serviced plots which could be easily brought forward for future employment uses.	
Opportunities	<ul style="list-style-type: none"> - Site is strategically located off the A470. - A number of plots exist which have infrastructure in place. - Site set within a high quality natural environment.
Constraints	<ul style="list-style-type: none"> - Very few obvious constraints to future development.

4. Parc Hafren Extension, Llanidloes (M163 EA2) (General Employment Site)

An allocated but un-developed site this extension lies adjacent to Parc Hafren. The site is considered suitable for future development and appears relatively unconstrained. It is considered that the allocation should remain in the plan, however, development in the short term should be focussed on the current employment site and only when that is operating at capacity should it be expanded.

Recommendation	2
It is recommended that this site remain as an allocation with development in the short term focussed on the existing adjacent employment site.	
Opportunities	<ul style="list-style-type: none"> - Site is strategically located off the A470. - Site set within a high quality natural environment.
Constraints	<ul style="list-style-type: none"> - Very few obvious constraints to future development.

8. Llanidloes Road, Newtown (M182 EA2) (Regional Employment Site)

An allocated but un-developed site, this allocation lies adjacent to Coleg Powys and opposite the popular Mochdre Industrial Estate. It is considered that the site should be retained as an employment allocation and promoted to accommodate future employment development.

Despite this recommendation we are aware of one major constraint in the area in relation to traffic congestion and accessibility. It is therefore considered that the site may not come forward unless improvements are made (e.g. Newtown bypass).

Recommendation	4
It is recommended that the site is retained as an allocation for future employment uses. The site should be developed alongside improvements in traffic flows and within the confines of constraints such as flooding.	
Opportunities	<ul style="list-style-type: none"> - Site is strategically located on the edge of settlement and adjacent to existing employment / education uses. - Site is well connected by road. - Site is well connected by public transport and by foot to the town of Newtown.
Constraints	<ul style="list-style-type: none"> - Part of the site lies within the flood zone. - Current traffic problems in the area may restrict attractiveness of the site.

12. St Giles, Newtown (M181 EA1) (Premium Employment Site)

Located to the north of Newtown this site offers a large expansion site, currently allocated as a premium site. It is considered that the allocation will be difficult to bring forward due to the site currently operating as a golf course. While the course is up for sale it is suggested that the allocation be re-considered and focus is put on regenerating / promoting the existing employment site.

Recommendation	1
It is recommended that the allocation be assessed and reconsidered given the constraints in bringing the site forward for employment use.	
Opportunities	<ul style="list-style-type: none"> - Site is strategically located in Newtown, just off the A483. - Site environment of high quality.
Constraints	<ul style="list-style-type: none"> - Allocation currently operating as a golf course. - Current employment site has high number of vacancies.

13. Sarn (M189 EA1) (Local Employment Site)

Located approximately 6 miles to the east of Newtown this allocation remains un-developed and therefore available. The site appears relatively unconstrained and it is therefore recommended that it is retained as an employment allocation to meet any local needs that may emerge over the plan period.

Recommendation	2
It is recommended that this site is retained as an employment allocation in order to meet local demands should they emerge over the plan period.	
Opportunities	<ul style="list-style-type: none"> - Site is centrally located within the settlement - Site well located in terms of road links along the A489
Constraints	<ul style="list-style-type: none"> - Allocation is fairly isolated and would therefore serve a local need.

14. Abermule Business Park, Newtown (M101 EA1) (General Employment Site)

Located to the south of Abermule off the A483 this site is currently undeveloped but in preparation. The site is within close proximity to Newtown and major road links. It is recommended therefore that the allocation is retained and promoted for employment uses moving forward.

Recommendation	4
It is recommended that this allocation is retained and promoted for employment use given the investment which has been put into the site and the strategic geographic nature of the allocation.	
Opportunities	<ul style="list-style-type: none"> - Site is well positioned along main A483 - Site preparation and infrastructure works complete - Close proximity to markets such as Newtown and Welshpool.
Constraints	<ul style="list-style-type: none"> - Allocation lies fully within identified flood zone.

15. Churchstoke (M117 EA1) (Local Employment Site)

This allocation is located to the east of Churchstoke, adjacent to the Harry Tuffins Supermarket on the A489. The site remains undeveloped. With Welshpool approximately 8 miles away and the dominance of the supermarket as the main employment use it is considered that the site should remain as an allocation to meet local need.

Recommendation	2
It is recommended that the site be retained as an employment site. These recommendations are supported by the rural location of the site which serves a wide area and will therefore accommodate local needs	
Opportunities	<ul style="list-style-type: none"> - Site access is good as currently serves the supermarket. - Edge of settlement location. - Potential to link to the supermarket use.

Constraints	- Isolated from larger settlements
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16. Montgomery (M176 EA1) (Local Employment Site)

Montgomery is a rural settlement, which is reflected by the employment site. The allocation lies adjacent to an existing employment site consisting of two units. One of the units is currently vacant, whilst the other is being used as a vet surgery.

The site feels isolated from the surrounding settlements; it is approximately 7 miles from Newtown, whilst the nearest rail station is 9 miles away. The site has been granted planning permission for a residential care home and it is therefore recommended that it is lost as an employment allocation.

Recommendation	1
It is recommended that the site is lost as an allocation given the current planning status and recent residential development nearby.	
Opportunities	- Sites environs are well maintained / managed
Constraints	- Isolated from larger settlements - Difficult to access - High vacancy rates

18. Buttington Cross Enterprise Park, Welshpool (M199 EA2) (General Employment Site)

Buttington Enterprise Park is one of Powys leading employment sites. This is clearly visible, as the site has between 8 and 15 large modern units, whilst the environs which these are set in are well maintained and landscaped.

The enterprise park is easily assessable by both road and rail, as the park is 1.5 miles away from Welshpool's Rail Station, whilst the site runs parallel to the A483.

With regards to future expansion, there are a couple of development plots on the entrance to the site, suggesting that the park could be developed to include more business units.

Recommendation	4
It is recommended that the site be retained and expanded wherever possible / demand exists. Due to the businesses which already operate from the site, it is suggested that a range of business unit sizes be implemented to complement the existing business, potentially helping to facilitate a cluster.	
Opportunities	- Easily assessable via the Welshpool Rail Station and the A483. - Modern business units, and landscaped surrounding environs. - A number of large multinationals currently in operation on site.

Constraints	- Site in close proximity to flood zone
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21. Trewern (M195 EA1) (Local Employment Site)

Located north of Welshpool on the A458 this local employment allocation currently contains 1 premise which is part of the resource recovery centre. Due to the nature of the current use on site and the location outside of Welshpool it is recommended that the site is retained as an employment allocation.

Recommendation	2
It is recommended that the site is retained as an employment allocation.	
Opportunities	<ul style="list-style-type: none"> - Site is close to Welshpool. - Current use on site may encourage certain types of industry moving forward.
Constraints	<ul style="list-style-type: none"> - Allocation is quite rural and access to the site is along a fairly minor road. - Current use (resource recovery centre) may limit attractiveness of the site for other 'clean' uses.

22. Offa's Dyke Business Park, Welshpool (M199 EA1) (Regional Employment Site)

Offa's Dyke Business Park is one of the principal business locations in Welshpool. This is reflected in the sites environmental quality and existing business units, which are well maintained and modern. The site is approximately 3 miles from Welshpool's high street and 2 miles to Welshpool's train station. The site is easily assessable from the A483, promoting good network links to neighbouring settlements.

Currently there are 5 units on site, each of which is fully occupied. The wider allocation also offers future expansion land.

The sites business use predominantly consists of B1, however there is an ancillary nursery on the site. With regards to vacant land to develop, there are a number of suitable plots on site, which have clearly been designated as future expansion employment sites.

Recommendation	4
It is recommended that the park be expanded and prioritised for employment development in the area.	
Opportunities	<ul style="list-style-type: none"> - Good access via A483 - Modern business units set within an attractive environment - Substantial land available for expansion
Constraints	- Site in close proximity to flood zone

23. Four Crosses (M133 EA1) (Local Employment Site)

Four Crosses employment site predominantly consist of B1 and B2 uses. The current stock is large in scale, and appears to be modern and recently built. In contrast, there is a number of smaller workshop units located in the east of the site, consisting of B1 business use. The site is easily assessable via the A483, however there is no rail station within close proximity.

The site is well maintained, with signs of landscaping and maintenance throughout. This maintenance stretches to a large vacant plot in the centre of the site, which offers potential for future development.

Occupancy on site is fair with the larger units fully occupied and some vacancies within the smaller workshop units.

Recommendation	2
It is recommended that the site be retained for employment purposes and the allocation retained in terms of providing an area of future expansion should this be required.	
Opportunities	<ul style="list-style-type: none"> - Good access via A483. - Land available for future development. - High occupancy rates
Constraints	<ul style="list-style-type: none"> - Isolated from larger settlements / employment sites

24. Meat Processing Plant – Llandrinio (Special Employment Site)

This special allocation is located near to the settlement of Llandrinio and includes a large area (approx 19ha) of agricultural / open land. It is understood that the allocation was made in relation to a specific enquiry by a large investor. Unfortunately this investment didn't materialise and the site remains available. Despite this availability it is considered unlikely that the site will be developed for employment uses given its location and current land use.

Recommendation	1
It is recommended that consideration be given to removing this allocation. The specific nature of the allocation would suggest limited demand for such a large site in this location moving forward. The allocation therefore may be better placed in other areas of the County where demand is likely to emerge over the plan period.	
Opportunities	<ul style="list-style-type: none"> - Opportunities considered limited in the absence of any large scale investor.
Constraints	<ul style="list-style-type: none"> - Site is currently farm / agricultural land. - Access is good, however, the site is not located particularly close to any major centres of population.

25. Llansanffraid-ym-Mechain (M165 EA1) (Local Employment Site)

Located in the centre of Llansanffraid-ym-Mechain this allocation lies to the south of the current Wynnstay Stores site. The site currently includes B2 and B8 uses associated purely with Wynnstay operations. While it is considered unlikely that significant new users will be attracted to the site it is recommended that the allocation is retained to meet local and specific need associated with continued Wynnstay operations on site.

Recommendation	2
It is recommended that the remaining allocation be retained. However, it is noted that it may be difficult to locate other uses on the site other than those associated with Wynnstay Stores due to current access arrangement.	
Opportunities	- Opportunities considered limited in the absence of any large scale investor.
Constraints	- Site is currently farm / agricultural land. - Access is good, however, the site is not located particularly close to any major centres of population.

26. Llanfyllin Enterprise Park (M157 EA1) (Local Employment Site)

Located at the lower end of Station Road this site currently offers small scale employment space. In total the site offers 10 units, 5 of which appeared to be vacant at the time of the survey. In terms of uses on site these are largely B1.

Recommendation	3
It is recommended that the employment allocation is retained in order to meet local employment need. It is also recommended that regeneration works are carried out to the existing units / site where necessary in order to overcome the apparent vacancy problem.	
Opportunities	- Site set within a pleasant natural environment and is well landscaped / maintained. - Potential to expand the site, increasing the number of small scale starter units in the County.
Constraints	- Site is accessed through Llanfyllin Industrial Estate. - Site is fairly constrained in terms of space and would require clearance.

28. Pontrobert (M186 EA1) (Local Employment Site)

This allocation is extremely local in nature and appears to remain un-developed with a series of barns on site. Due to the rural nature of the settlement it is recommended that the allocation is retained in order to meet any future demand for small village workshop type units to meet local need.

Recommendation	2
It is recommended that the allocation is retained in order to provide local options for the	

development of employment land / premises.	
Opportunities	<ul style="list-style-type: none"> - Site offers potential for small scale community base employment space. - High quality natural environment.
Constraints	<ul style="list-style-type: none"> - Site constrained in terms of access. - Buildings currently on site

29 Llanerfyl (M153 EA1) (Local Employment Site)

Located in the south of the village of Llanerfyl this employment allocation currently contains some small village workshops. Of the 10 units on site only 2 or 3 appeared to be occupied during the visit. Despite this vacancy rate, it is recommended that the allocation on the site is retained in order to meet any future local demand in what is a fairly remote rural community.

Recommendation	2
It is recommended that the employment allocation is retained.	
Opportunities	<ul style="list-style-type: none"> - Further develop the employment base, expanding the range of units on site should demand materialise. - Promote the units and encourage growth of those businesses currently located in the premises.
Constraints	<ul style="list-style-type: none"> - Rural nature of the site limits market and future potential. - Site appears relatively underutilised and in need of some maintenance / investment.

30 Penybontfawr (M184 EA1) (Local Employment Site)

This allocation remains un-developed and therefore available. The site is located in the rural settlement of Penybontfawr and it is recommended that the allocation is retained in order to meet any future employment demand with the settlement or its surroundings.

Recommendation	2
It is recommended that this allocation is retained in order to meet future local demand / need.	
Opportunities	<ul style="list-style-type: none"> - Site appears fairly unconstrained for future development. - Opportunity for small scale employment / neighbourhood uses.
Constraints	<ul style="list-style-type: none"> - Site is located in small settlement which has limited access from public transport. - Access by road is along a B class road.

5.2.4 Machynlleth Cluster

1. Treowain Enterprise Park, Machynlleth (M172 EA1) (Special Employment Site)

Located in the south of Machynlleth off Forge Road this employment site is currently operating successfully with a total of 11 units with 2 vacancies. The site contains a mixture of B1, B2 and B8 units and has infrastructure in place to serve the allocation / expansion land. It is recommended that the allocation is retained for future employment expansion due to the nature of the site and its benefits in terms of accessibility and current uses.

Recommendation	4
It is recommended that the site be retained and promoted for future employment uses. Due to the limited employment space within Machynlleth Treowain offers one of the only opportunities for expansion of employment land in Machynlleth.	
Opportunities	<ul style="list-style-type: none">- Further development of the site to accommodate employment growth in the cluster.- Infrastructure is largely in place to serve allocation.
Constraints	<ul style="list-style-type: none">- Constraints appear relatively limited in relation to future allocation / expansion.

5.3 Un-allocated Portfolio

Alongside the allocations made as part of the UDP this study has also assessed a number of un-allocated employment sites within the County, many of which are considered to be of importance in the overall portfolio going forward, in some cases offering further expansion potential or in other cases offering important employment premises which we feel require protection.

The sites reviewed below are therefore included on one of three grounds including:

- An important existing site offering potential to contribute to future allocations through expansion;
- An existing site which may require regeneration / investment over the plan period to retain its status; or
- An existing site which requires protection going forward.

While the sites included below have been evaluated the focus for this study was to identify sites which offer potential to form part of future supply within the County. The report does not attempt to provide a review of the quality and make recommendations for all existing employment sites.

Summaries are once again provided for each of the sites and the recommendation corresponds with [Table 5.3.1](#) and [Figure 5.1](#) below.

5.3.1 Ystradgynlais Cluster

5. Ystradgynlais Workshops, Ystradgynlais

These workshops are considered to form an important part of the employment property portfolio in Powys. The site appears to have a high occupancy and offers small scale units suitable for small to medium sized businesses.

While there is limited potential to expand this site, it is considered that this site should be protected going forward.

Recommendation	2
It is recommended that this site be protected for employment uses going forward due to the nature of the units which offer quality start-up space within this area of Powys.	
Opportunities	<ul style="list-style-type: none">- Good strategic location.- Good accessibility.
Constraints	<ul style="list-style-type: none">- Limited space for future expansion / contribute to future supply.

6. Gurnos Industrial Estate, Ystradgynlais

Located on the border of Powys CC and Neath Port Talbot CBC this site offers modern workshop style units along with an area of land suitable for future expansion. The site is currently well occupied and contains a mixture of B1 and B2 uses.

The location and nature of the site makes it attractive for potential future expansion of employment land and it is therefore recommended that the site be retained and promoted for employment uses.

Recommendation	3
It is recommended that the site be retained with some investment in the space around units and further expansion of the site should demand / investment come forward.	
Opportunities	<ul style="list-style-type: none">- Expansion land available / could contribute to future supply.- Strong strategic location.
Constraints	<ul style="list-style-type: none">- Constraints appear relatively limited in relation to future allocation / expansion.

5.3.2 Central Powys Cluster

1. Three Cocks Industrial Estate, Three Cocks

Located adjacent to the Javel Industrial Estate, this site contains a mixture of B2 and B8 uses. The premises are medium sized and all have a fair bit of land surrounding them. There appeared to be no vacancies at the time of survey.

The nature of the site and its environment is reflective of the type of uses and while the size of premises would appear to limit the attractiveness of the site for many users it is considered that the site should be protected and regenerated where required going forward.

Recommendation	2
It is recommended that the site be retained for employment use although it doesn't offer potential expansion to include as part of future supply.	
Opportunities	- Demand appears good for the site.
Constraints	- No expansion land available / no contribution to future supply.

4. Irfon Enterprise Park, Builth Wells

Located on the outskirts of Builth Wells this site currently contains a variety of B8 and B1 uses. A small area of the site is also taken by tertiary uses including wedding car hire and plant sales. A residential development was underway at the rear of the site during the visit and it was concluded that the site offers a limited amount of potential for expansion on land to the west.

It is therefore recommended that the site is retained and protected for employment uses going forward.

Recommendation	2
While a small amount of land is available for expansion on site it is recommended that the site is retained for employment and not promoted for expansion.	
Opportunities	- Continued high occupancy. - Potential small scale expansion.
Constraints	- Site is in need of some regeneration / refurbishment. - Located outside of Builth Wells.

11. Old Town Hall Workshops , Llandrindod Wells

The Old Town Hall workshops are central to Llandrindod Wells town centre, located just off the main high street. In total, the current stock consists of 6 units, of which there are 1-3 units vacant. The existing units are well maintained, however are small in size which limits users to small scale businesses.

The town centre location provides the site with good transport connections. Accessing the site by vehicle, bus or train is good, thus the workshops have good market viability. It is therefore recommended that the workshops are retained and protected moving forward.

Recommendation	2
The workshops offer no potential to contribute to future employment land allocations, however they do offer important employment space in the town centre and should be protected / retained.	

Opportunities	<ul style="list-style-type: none"> - Excellent accessibility / linkages. - Town centre location.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply.

12a. Presteigne Industrial Estate

The Presteigne Industrial Estate lies to the North of Broadaxe Business Park. The site is well maintained and appears to have a high occupancy rate and for the most part is well maintained. There are between 15-20 business units on site, ranging from large industrial units to smaller workshops. There is a mix of business units on site; however the most predominant use is B8 – Distribution. While the site has a central plot which could be utilised for future development, it is considered that this green area adds to the overall perception of the Estate and therefore development should be focussed on the allocated land to the south on the Broadaxe Business Park.

The park's market viability is good, as the site is easily accessible from the B4355, whilst there are a number of bus stops located along this stretch.

Recommendation	2
The Estate should be retained for employment uses, with new employment development focussed on allocated land to the south on the Broadaxe Business Park.	
Opportunities	<ul style="list-style-type: none"> - High occupancy rate suggests strong demand / loyal occupiers - Close proximity to town centre - Good accessibility.
Constraints	<ul style="list-style-type: none"> - Site offers limited / no potential for expansion / to contribute to future supply.

14. East St Enterprise Park, Rhayader

Located in the centre of Rhayader, this site offers a total of 10 workshop style units set within a high quality environment and within close proximity to the town centre. At the time of survey 3 of the 10 units were vacant and being advertised to let. Due to the location of the site the majority of uses were B1 in nature.

It is recommended that the site be protected as an important employment portfolio for small to medium sized businesses in this area of the County.

Recommendation	2
The site offers no potential to contribute to the future employment land supply but should be protected as an important site for small to medium sized businesses.	
Opportunities	<ul style="list-style-type: none"> - Excellent location / linkages. - High quality environment.

Constraints	- Site offers no potential for expansion / to contribute to future supply.
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19. Three Cocks – Land for Sale

Situated just outside of the Brecon Beacons National Park close to the intersection of the A4078 Talgarth Road with the A438 Brecon to Hereford road, this site is currently undeveloped but has recently achieved planning permission for the development of an industrial unit with vehicular access. The site extends to 2.3 hectares and is being marketed as available for development for one industrial unit or with the potential to be split into four plots.

It is recommended that the site be protected and promoted and potentially allocated for employment uses going forward.

Recommendation	4
Due to the planning status it is recommended that the site is promoted for employment use. When known, the site and surroundings should be considered in the context of the spatial strategy and could contribute to future supply.	
Opportunities	- Strategic location. - Potential to contribute to future supply.
Constraints	- Greenfield site.

5.3.3 Severn Valley Cluster

5. Station Workshops, Llanidloes

Located in the centre of Llanidloes, just off Brook Street the Station workshops offer a total of 13 office / workshop units. At the time of survey it appeared that 8 of the 13 were vacant and were being advertised to let.

Despite this vacancy rate it is considered the workshops offer important office style accommodation in the area and should therefore be protected.

Recommendation	2
The workshops offer no potential to contribute to future employment land allocations, however they do offer important employment space in the town centre and should be protected / retained.	
Opportunities	- Good accessibility / linkages. - Town centre location.
Constraints	- Site offers no potential for expansion / to contribute to future supply.

6. Maesllan Enterprise Park, Llanidloes

Located adjacent to the station workshops the Maesllan offers more general small to medium scale industrial premises in the heart of Llanidloes. At the time of survey the 8 units on site were all occupied with a mixture of B1, B2 and B8 uses.

Due to the popularity of the site it is recommended that it is protected as an employment site going forward. Although the nature of the site largely reflects the uses located there it is considered that the site would benefit from some regeneration in the future.

Recommendation	2
The site offers limited potential to contribute to future allocations however should be protected as a popular employment site in this area of the County.	
Opportunities	<ul style="list-style-type: none">- Excellent accessibility / linkages.- Town centre location.
Constraints	<ul style="list-style-type: none">- Site offers no potential for expansion / to contribute to future supply.

7. Caersws Village Workshops, Caersws

Located in the centre of Caersws, within close proximity to the main A470 and the railway station this modern site offers small scale office / lock up style workshop units. Due to the location / nature of the units they contain a variety of B1 uses.

At the time of the survey it appeared that 3-4 of the 12 units were vacant suggesting a good take up. The site is considered to provide high quality employment space in a central location within the settlement and should be retained and protected.

Recommendation	2
The workshops offer no potential to contribute to future employment land allocations, however they do offer important employment space in the town centre and should be protected / retained.	
Opportunities	<ul style="list-style-type: none">- Excellent accessibility / linkages.- Village centre location.
Constraints	<ul style="list-style-type: none">- Site offers no potential for expansion / to contribute to future supply.

9. Dyffryn Enterprise Park, Newtown

The Dyffryn Enterprise Park is located to the north east of Newtown centre on the A483 Pool Road. The park offers a total of 24 units, the majority of which are medium size, although there is an areas of smaller workshop type units. At the time of the survey 3 units were found to be vacant / to let and sub division of units was marketed as an opportunity. Due to the variety of units on site there is a mix of B1, B2 and B8 uses. Alongside the main B use classes there is a number of retail based units located on this estate.

As one of the largest sites in Newtown with low vacancy rates it is recommended that the site be protected for employment going forward.

Recommendation	3
While the site offers no potential to contribute to future allocations it is considered an important employment site which should be protected / regenerated.	
Opportunities	<ul style="list-style-type: none"> - Strong location. - High occupancy rates.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply.

10. Mochdre Enterprise Park, Newtown

The Mochdre Enterprise Park lies on the western edge of Newtown on the Llanidloes Road. The estate is vast in overall size and contains a total of 51 premises. Although some vacancies were apparent during the site survey these were minimal given the extent of the park.

Uses on site vary according to the area of the park and include largely B2 and B8 uses in the areas on the entrance with higher spec B1 uses as you progress further into the park. Despite its size anecdotal evidence suggests some access problems to the site due to congestion.

Due to the extent and various uses on site it is recommended that the site is retained and protected for employment uses.

Recommendation	3
The site does offer some potential to contribute to future allocations. However, traffic is known to be a major constraint in the area at present and therefore the site should be retained and protected for employment purposes. Expansion should be considered alongside improvements such as the proposed bypass.	
Opportunities	<ul style="list-style-type: none"> - Excellent accessibility / linkages. - High occupancy / demand.
Constraints	<ul style="list-style-type: none"> - Site constrained by current traffic problems. - Site constrained by gradient of land to east.

11. Vastre Enterprise Park, Newtown

The Vastre enterprise park is one of Newtown largest employment sites. In total, there are 39 units, with approximately 13-17 vacant. The majority of these vacancies are in the smaller workshop units, suggesting that demand for smaller spaces is not at a premium. Predominantly, the main business use on site is B8, as Laura Ashley, a large retail brand has a number of storage and distribution depots at the site. Alongside the traditional B use classes there is a significant retail element to the site which may have an impact on the sites future.

The current stock is aging, however for the most part is in good condition. The units are set in well maintained grounds as there are a number of flower beds and tree saplings throughout the

site. Accessing Vastre Enterprise is one of the sites main attributes, as the park is just off the A489 and is within walking distance of Newtown’s Rail Station.

It is recommended that the current site be regenerated where necessary in order to overcome vacancies and is subsequently protected for employment purposes going forward.

Recommendation	3
The site has ageing stock but is important in terms of scale and location. While not contributing to future employment allocations it is recommended that the site be regenerated and protected for employment uses.	
Opportunities	<ul style="list-style-type: none"> - Excellent accessibility / linkages. - Town centre location.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply. - Business premises appear aging / in need of upgrading.

12a St Giles, Newtown

Located to the north of Newtown this existing employment site is suffering from a number of vacancies. The overall quality of the site is good and therefore it is considered that the site should be promoted and regenerated where possible to increase occupancy levels.

Recommendation	3
It is also considered that this employment site should be regenerated / promoted to increase occupancy levels. The site offers no expansion opportunities.	
Opportunities	<ul style="list-style-type: none"> - Site is strategically located in Newtown, just off the A483. - Site environment of high quality.
Constraints	<ul style="list-style-type: none"> - Site has high number of vacancies.

17. Welshpool Business Centre, Welshpool

Welshpool business centre is a small employment site in the heart of Welshpool’s town centre. The Business Use Class for the site is predominantly B1, as the majority of units are used as office space and there would appear to be a number of vacant spaces in the main office block.

The site is constrained; however the units and surrounding spaces are well maintained. It is important to note however that there is no surplus space for development, thus future expansion is limited.

Due to the town centre location, the business centre is easily assessable via vehicle, bus and train, thus the site has good market viability and is sustainable in its current use. The site should therefore be protected.

Recommendation	2
The site offers no potential to contribute to future employment land allocation, however, its	

location and office nature brings a recommendation of protection.	
Opportunities	<ul style="list-style-type: none"> - Good accessibility / linkages. - Town centre location.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply.

19. Severn Farm Enterprise Park, Welshpool

Severn Farm Enterprise Park consists of a current stock of 28 units, 1-5 of which are vacant. The predominant business use for the site is B1 and B2, as there are a number of light and general industries operating from the site.

Generally, the environmental quality of the site is good. The park has a number of new and old units, the modern units being smarter in appearance, whilst the older units are aging, becoming scruffy and un-tidy. Environmental landscaping is also minimal on site, as the park has an urban, concrete feel, with very few grass banks.

Transport links to and from the site are good. The park is situated just off one of Welshpool's main interchanges and is therefore assessable via the A483. The site can be accessed via rail also; at Welshpool's train station is less than half a mile away. The site should therefore be protected for employment uses going forward.

Recommendation	2
The site offers no potential to contribute to future employment land allocations but should be protected for employment purposes.	
Opportunities	<ul style="list-style-type: none"> - Good accessibility. - High occupancy.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply. - Environmental quality of the site could be improved.

20. Henfaes Lane, Welshpool

Located on the outskirts of Welshpool this estate provides a range of medium and large scale units containing a mixture of B1, B2 and B8 uses. Due to its geographic location, haulage and distribution appears to be a prominent use on the site.

While no expansion land was identified through site work it is recommended that the site is protected for employment uses going forward due to its strategic nature and location.

Recommendation	2
The site was assessed to offer no potential to contribute to future employment land allocations. Due to the occupancy and use the site should be protected for employment in the future.	

Opportunities	<ul style="list-style-type: none"> - Strategic location on the outskirts of Welshpool. - Good occupancy rates.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply.

27. Llanfyllin Industrial Estate, Llanfyllin

The Llanfyllin Industrial Estate contains 4 large scale units with no current vacancies and houses largely B2 and B8 uses. The environment around the site reflects the heavy uses which take place in the units. Given the apparent popularity of the site it is recommended that it is retained and protected for medium to large scale industrial uses.

Recommendation	2
The site offers no potential to contribute to future employment land allocations. However it has good occupancy rates and long term occupiers and should therefore be protected for employment purposes.	
Opportunities	<ul style="list-style-type: none"> - Good accessibility / linkages on the outskirts of Llanfyllin. - Appears to have long term tenants / users.
Constraints	<ul style="list-style-type: none"> - Site offers no potential for expansion / to contribute to future supply. - Environment generally low quality, reflecting the uses on site.

31. Former Texplan Site, Carno

This site was identified both through consultation and site survey work. Measuring approximately 3.22 hectares the site and its buildings are currently vacant and the site is becoming overgrown.

Due to the location of the site and its overall size it is considered unlikely that the site will come forward for solely employment uses going forward. It is therefore recommended that the site is not included in the overall employment land portfolio for the County.

Recommendation	1
The site does not currently form part of the employment land supply in the County and due to the size of the site and the amount of work required to bring it forward it is not recommended that the site is included in any supply going forward.	
Opportunities	<ul style="list-style-type: none"> - Former employment use. - Railway line runs adjacent to the site.
Constraints	<ul style="list-style-type: none"> - Site requires large investment to bring it back into use. - Considered unlikely that the site would be redeveloped solely for employment purposes.

5.3.4 Machynlleth Cluster

2. Dyfi Eco Park, Machynlleth

The Dyfi Eco Park is located on the outskirts of Machynlleth in close proximity to the railway station and town centre. The site contains a total of 9 units, 7 of which are within the eco park and 2 are outside the park. At the time of survey there were no vacancies on site. The majority of uses on the eco park are B1 in nature with a focus on office space for high tech / renewable energy businesses.

The site is of an extremely high quality and it is therefore recommended that it is retained and protected as an employment site going forward.

Recommendation	2
The site offer no potential to contribute to future employment land allocations, however it is considered that the site should be protected for employment and continue to lead the way in terms of sustainable employment sites in the County.	
Opportunities	<ul style="list-style-type: none">- Excellent accessibility / linkages.- Edge of centre location.- High occupancy / potential to develop a cluster of similar businesses.
Constraints	<ul style="list-style-type: none">- Site offers no potential for expansion / to contribute to future supply.

5.4 Conclusions

Section 5.2 above provides a review of all employment land allocations made as part of the UDP (the baseline) in order to assess their suitability to continue to provide appropriate allocations. The recommendations made on these sites is based on the site survey work completed as part of the study (see Appendix A) which has been further informed by consultations with key stakeholders.

Section 5.3 provides a review of other, current employment sites which were picked up alongside the review of allocations. The section does not attempt to provide a comprehensive review of all employment sites in the County and focuses on identifying existing sites which offer areas for expansion and therefore the potential to be included as part of future supply allocations. Where sites were not considered to offer this potential, recommendations were made in relation to their importance as current sites and therefore the need to protect / regenerate them over future years.

A number of additional sites have been identified following site survey work including Banwy Industrial Estate and Four Crosses Creamery. While we have not undertaken an exhaustive search we have highlighted and reviewed the context of these two sites and consider that both sites provide for local need and therefore should be considered under general protection policies.

The recommendations made in **Sections 5.2** and **5.3** are summarised in **Section 5.5** below and are geographically presents on **Figure 5.1**. These recommendations form a supply baseline for use when developing allocations as part of the LDP process.

5.5 Supply Recommendations

Following site appraisals an overall score has been allocated to each site which makes up the current supply. This approach has allowed a scale of between 1 and 4 to be used to conclude the recommended actions for each site, in line with the descriptions contained in [Table 5.1.1](#).

The current employment land supply is detailed in [Table 5.3.2](#) below which includes information relating to location (settlement and region), current status, developed status, site area and the recommendation being made through the supply analysis.

The table includes reference to both current employment allocations, along with other employment sites which we consider should be considered within the overall portfolio. For both the current allocations and un-allocated sites we have explored the amount of development land that is available going forward. Where allocations exist it is these that have formed the basis for future supply calculations (original allocation – amount currently developed). Where we have explored un-allocated employment sites, the focus has been to identify any potential development areas within the site.

Alongside the findings and recommendations being presented in the table below they have also been spatially presented on [Figure 5.1](#).

Table 5.3.2 - -Employment Sites – Allocations & Existing (un-allocated)

Ref No.	Site Name	Location	Existing Allocation?	Size (ha)	Development Land Available?	Size of Development Area (ha)	Proposed Category	Recommendation
Ystradgynlais Cluster								
1	Woodlands Business Park	Ystradgynlais	Yes	2.1	Yes	1.06	High Quality	4
2	Cae'r-bont	Ystradgynlais	Yes	1.5	Yes	1.5	Local	3
3	Penrhos	Ystradgynlais	Yes	1	No	0	Lost	1
4	Ynyscedwyn	Ystradgynlais	Yes	0.7	Yes	0.7	Local	2
5	Ystradgynlais Workshops	Ystradgynlais	No	0.7	No	0	Local	2
6	Gurnos Industrial Estate	Ystradgynlais	No	1.6	Yes	0.5	Local	3
Central Powys Cluster								
1	Three Cocks Industrial Estate	Three Cocks	No	2.9	No	0	Local	2
2	Javel Industrial Estate	Three Cocks	Yes	0.6	Yes	0.6	Local	3
3	Wyeside Enterprise Park	Builth Wells	Yes	2.5	Yes	2.16	High Quality	4
4	Irfon Enterprise Park	Builth Wells	No	0.5	Yes	0.1	Local	2
5	Newbridge-on-Wye	Newbridge-on-Wye	Yes	0.5	Yes	0.5	Neighbourhood	2
6	Crossgates	Crossgates	Yes	0.6	Yes	0.6	Local	2
7	Heart of Wales Business Park	Llandrindod Wells	Yes	4.9	Yes	4.57	Prestige	4
8	Ddole Road	Llandrindod Wells	Yes	4	Yes	4	High Quality	3
9	Llandrindod Wells	Llandrindod Wells	Yes	0.57	Yes	0	Local	4
10	Llandrindod Wells	Llandrindod Wells	Yes	1.12	Yes	1.12	Local	4
11	Old Town Hall Workshops	Llandrindod Wells	No		No	0	Neighbourhood	2
12	Broadaxe Business Park	Presteigne	Yes	4.4	Yes	3.18	Local	2
12.a	Presteigne Industrial Estate	Presteigne	No	4.6	No	0	Local	2
13	Brynberth Enterprise Park	Rhayader	Yes	3.8	Yes	3.8	Local	3
14	East St Enterprise Park	Rhayader	No	1.6	No	0	Local	2
15	Knighton	Knighton	Yes	0.9	Yes	0.9	Local	2

16	Knighton Enterprise Park	Knighton	Yes	1.1	Yes	0.44	Local	2
17	Knucklas	Knucklas	Yes	0.5	Yes	0.5	Neighbourhood	1
18	Llanwrtyd Wells	Llanwrtyd Wells	Yes	0.38	Yes	0.38	Neighbourhood	2
19	Three Cocks - Land	Three Cocks	No	2.3	Yes	2.3	High Quality	4
Severn Valley & North Cluster								
1	Llangurig	Llangurig	Yes	0.4	Yes	0.4	Neighbourhood	2
2	Great Oaks Business Park	Llanidloes	Yes	1.8	Yes	0.3	High Quality	4
3	Parc Hafren	Llanidloes	Yes	2.3	Yes	1.47	Local	4
4	Parc Hafren Extension	Llanidloes	Yes	3	Yes	3	Local	2
5	Station Workshops	Llanidloes	No	0.17	No	0	Local	2
6	Maesllan Enterprise Park	Llanidloes	No	0.85	No	0	Local	2
7	Caersws Village Workshops	Caersws	No	0.2	No	0	Neighbourhood	2
8	Llanidloes Road	Newtown	Yes	4.2	Yes	4.2	High Quality	4
9	Dyffryn Enterprise Park	Newtown	No	9.3	No	0	Local	3
10	Mochdre Enterprise Park	Newtown	No	38.5	Yes	2	High Quality	3
11	Vastre Enterprise Park	Newtown	No	11.2	Yes	1.8	Local	3
12	St Giles	Newtown	Yes	7.3	Yes	0	Lost	1
12a	St Giles Business Park	Newtown	No		No	0	Local	3
13	Sarn	Newtown	Yes	0.46	Yes	0.46	Local	2
14	Abermule Business Park	Abermule	Yes	2.6	Yes	2.6	High Quality	4
15	Churchstoke	Churchstoke	Yes	1.54	Yes	1.54	Local	2
16	Montgomery	Montgomery	Yes	1.6	Yes	0	Lost	1
17	Welshpool Business Centre	Welshpool	No		No	0	Neighbourhood	2
18	Buttington Cross Enterprise Park	Welshpool	Yes	3.9	Yes	1.5	Prestige	4
19	Severn Farm Enterprise Park	Welshpool	No	11.7	No	0	Local	2
20	Henfaes Lane	Welshpool	No	21.8	No	0	High Quality	2
21	Trewern	Trewern	Yes	1.43	Yes	1.43	Local	2
22	Offa's Dyke Business Park	Welshpool	Yes	8.2	Yes	7.8	Prestige	4
23	Four Crosses	Four Crosses	Yes	1	Yes	0.75	Local	3

24	Meat Processing Site	Llandrinio	Yes	19	No	0	Lost	1
25	Wynnstay Stores	Llansanffraid ym Mechain	Yes	1.6	Yes	1.6	Local	2
26	Llanfyllin Enterprise Park	Llanfyllin	Yes	0.28	Yes	0.28	Local	3
27	Llanfyllin Industrial Estate	Llanfyllin	No	1.6	No	0	Local	2
28	Pontrobert	Pontrobert	Yes	0.12	Yes	0.12	Neighbourhood	2
29	Llanerfyl	Llanerfyl	Yes	0.44	Yes	0.15	Neighbourhood	2
30	Penybontfawr	Penybontfawr	Yes	0.5	Yes	0.5	Neighbourhood	2
Machynlleth Cluster								
1	Treowain Enterprise Park	Machynlleth	Yes	1.3	Yes	1.3	High Quality	4
2	Dyfi Eco Park	Machynlleth	No	1.8	No	0	Prestige	2
				TOTAL ALLOCATED	94.1		55.4	
				TOTAL (ALLOCATED & UN-ALLOCATED)	200.86		62.1	

6 SUMMARY

The above review has shown a vast supply of employment land (allocations and existing sites) across the County.

The calculations suggest an original UDP supply through allocations of some **75.14 ha** with some **64.31 ha** of this allocation remaining available for development.

Taking into consideration our recommendations we have calculated some 55.4 ha of the original UDP allocation which remains undeveloped and more importantly considered suitable for employment related development going forward.

Alongside this original allocation we have identified other un-allocated sites which offer potential for infill / expansion. Taking these sites into account we estimate there to be a further 6.7 ha of land available for employment uses, giving a total supply of 62.1 ha.

This available land includes existing allocations which have not been built out, current employment sites (un-allocated) which offer potential for expansion, and excludes sites which we have recommended for other uses.

In summary we conclude that the County has an extensive supply of employment land, both through allocations and sites offering potential for expansion. While this extensive supply exists across the County it should be noted that trends in relation to over / under supply exist in certain spatial clusters. The Ystradgynlais cluster for example has seen a large proportion of its original allocation developed over the plan period and therefore the area has a relative under supply going into the LDP period. Conversely, the data presented above would suggest that the Central Powys and Severn Valley clusters have a higher level of undeveloped allocation and therefore may have less of a requirement for further employment land allocations.