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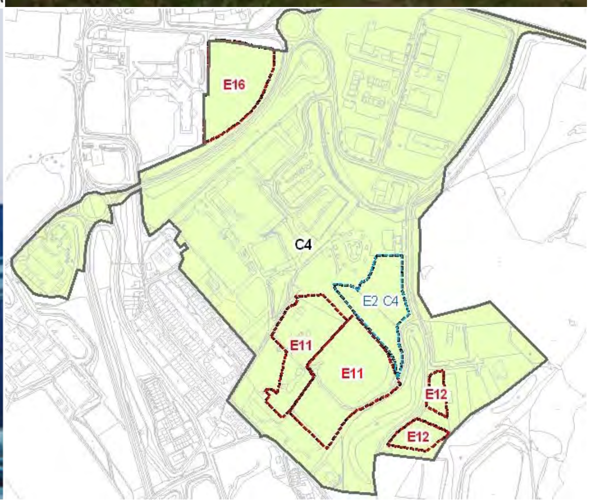
Final Report

Blaenau Gwent County Borough Employment Sites and Premises Study



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Blaenau Gwent County Borough Council Employment Sites and Premises Study

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CONTENTS

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ABBREVIATIONS

ABI	Annual Business Inquiry
ASHE	Annual Survey of Hours and Earnings
Blaenau Gwent CBC	Blaenau Gwent County Borough Council
DCLG	Department for Communities and Local Government
ELA	Employment Land Allocations
LDP	Local Development Plan
ODPM	Office of the Deputy Prime Minister
ONS	Office of National Statistics
PPW	Planning Policy Wales
PPW	Planning Policy Wales
SEBREC	South East Wales Biodiversity Records Centre
SEWEF	South East Wales Economic Forum
SIC	Standard Industrial Classification
UDP	Unitary Development Plan
WAG	Welsh Assembly Government
WDA	Welsh Development Agency
WDA/DEIN	Welsh Assembly Government's Department of Enterprise, Innovation and Networks

EXECUTIVE SUMMARY

Purpose

URS together with Cooke & Arkwright were commissioned by Blaenau Gwent County Borough Council (BGCBC) to undertake a study to assess the quantity, quality and viability of employment sites and premises throughout the County Borough.

The need for such studies has been emphasised through Planning Policy Wales (PPW), which provides the strategic policy framework for effective preparation of local planning authorities' development plans. This framework is based on principles that reflect the sustainable development agenda and the priorities in the Wales Spatial Plan, which should be taken into account in the preparation of UDPs/LDPs and in the control of development throughout Wales.

Approach

The study area included the whole of the Blaenau Gwent CB. The majority of Employment Land Allocations[1] and existing industrial areas are located in the north of the County Borough in close proximity to the A465 (the Heads of the valley Road). All other Employment Land Allocations and existing industrial areas are located south of the A465, in close proximity to the A4048, the A4046 and the A467.

The following elements of work informed this study and our recommendations:

- Review of policy and literature
- Employment and business profiling
- Employment land surveying and appraisal
- Market and demand assessment
- Employment land forecasting exercise

Employment and Business Profiles

A broader socio-economic analysis was undertaken of Blaenau Gwent within the context of Wales and Great Britain as a whole in order to provide an in depth understanding of the current population and socio-economic make-up of the County Borough.

Since the 1991 Census Survey, Blaenau Gwent has experienced a population decline of 3%, which is representative of the trend in South Wales. The 2005 Mid-Year Estimate figures suggest that 68,400 people live in the area. Employment during the 2001 census was dominated by the manufacturing industry, where approximately 33% of the people employed in Blaenau Gwent worked. Over the past decade the trend has changed and according to the 2004 annual business inquiry, majority of the employed people work in the service sectors (67.3%). Manufacturing industry has seen a drastic decrease in employee jobs (-40.09%) since 1998, yet accounts for a significant number of the total employee jobs (5,500).

[1] As per policy E2 of the adopted BGCBC Unitary Development Plan (July 2006).

According to the 2001 Census, the main form of transport to work for those employed in Blaenau Gwent was by car or van, with three-quarters of the 25,133 employees either driving to work or travelling as a passenger in a car or van.

Employment Land Survey and Review of Supply

We firstly carried a desk-based review of the existing Employment Land Allocations (ELAs) within Blaenau Gwent CB (Policy E2 sites of the UDP) in order to identify sites to be targeted for a field survey, along with the broad employment area opportunities and constraints. UDP policy numbers E2 (1) to E2 (30) formed the focus of the field survey as these consisted of vacant sites ready for development. Also identified through the desk-based review were the boundaries of the existing industrial and commercial areas within the County Borough.

Identified ELAs and existing industrial and commercial areas were then grouped into 14 clearly defined employment clusters (see A0 size inset map at rear of document) and in total this supply covered 450 hectares of land. Each employment cluster was then visited and appraised against an agreed set of economic, planning and property market criteria to assess fitness for purpose. Furthermore, the ELAs were appraised against additional criteria, to measure their sustainability, marketability and potential for being brought forward for employment use before the end of the LDF period or re-designation for a different use.

Our survey identified that the majority of employment clusters (84%) were in good condition in terms of building condition and quality of environment. In terms of the sustainability of ELAs, the vast majority (94%) were considered to have good or very good access to the strategic road network suggesting their suitability for industrial and warehousing uses in particular. However, less ELAs were considered to have good access to public transport (38%) and only a small minority (7.5%) were considered to have good access to facilities and amenities. It should be noted however that industrial-type employment sites are often located away from facilities and amenities and that office-type employment sites are usually located closer to them. The majority of Blaenau Gwent's existing employment clusters and associated ELAs are industrial in nature so it is not unusual that so few are located close to facilities and amenities.

The consultants did not undertake a detailed topographical survey of sites or investigate ground conditions. However, the Council subsequently informed us that all ELAs south of the Heads of the Valley Road may have audits running through them or underneath them. As such round 61% of ELAs are constrained in some form or another.

Market Review

Cooke and Arkwright carried out a market review of employment land in the County Borough and the wider south Wales region of which it forms a part.

Research found that the employment land market in south-east Wales has undergone major structural changes over the last 30-40 years. The earlier part of this period saw the rapid decline of dependency on the traditional primary industries of coal, steel and quarrying and its replacement with a more diverse industrial base after a period of painful transition. Government policy in the form of state aid together with EU funding has been a major driver in creating sustainable employment in the more deprived areas of the region including Blaenau Gwent. This had been linked with considerable investment in physical infrastructure in the form of roads, land reclamation and advance factory programmes.

Large-scale UK and international inward investment employment opportunities have diminished as multi-national companies go global. Demand for large-scale sites is anticipated to be lower in coming years than it has been in the past. The market for small to medium-sized units is active and has good occupancy levels. Scarcity of units in the coastal and lower valleys areas has shifted the focus to the upper valleys including Blaenau Gwent.

Current demand suggests that additional small workshops of 139-500 sq m (1,500-5k sq ft) are needed but planned developments at Rassau and Cwmcrachen[2] may satisfy this in the immediate future and longer term. A limited development of small campus-style offices at Victoria or Tredegar Business Park may be viable with grant support.

The forthcoming train line is likely to have a positive effect upon the industrial land market in Blaenau Gwent by making the area more accessible to people living outside the County Borough. On the same token it will make it easier for Blaenau Gwent residents to travel to other areas to work. Either way the train line is likely to have a positive and regenerative impact on Blaenau Gwent.

Demand Forecast

We forecast future demand of employment land by type and size taking account of Floorspace forecasts and Employment forecasts. Figures were then synthesised to calculate forecasted changes in employment land demand between 2005 and 2021 for land in office, factory and warehouse use (Table 1). The synthesis model takes account of the historically higher rates of employment growth in Cardiff as an aspiration for Blaenau Gwent to achieve the higher rates of growth than have been achieved in other areas of SE Wales.

Table 1: Forecasted Changes in Employment Land Demand 2005 – 2021

	Total Stock of Floorspace in 2005 (m^2)	Total Stock of Floorspace Demanded in 2021 (m^2)	Net Demand in Floorspace by 2021 (m^2)	Net Demand in employment land by 2021	
				m^2	Hectares
Office (B1)	38,667	46,688	10,256	31,558	3.2
Factories (B2)	452,400	399,791	-52,609	-131,523	-13.2
Warehouses (B8)	88,833	96,492	7,659	15.317	1.5
Total	**579,900**	**542,970**	**-34,694**	**-84,647**	**-8.5**

Source: URS Calculations

We considered there will be a number of additional factors that may contribute to employment growth in Blaenau Gwent up to 2021 and beyond which have not been accounted for within the above synthesis model and as such we have factored these into the employment forecast model (Table 2). The additional factors that may contribute to employment land demand are:

- The regenerative impact of the train line

[2] Based on information received from the Council's planning department in early 2007.

- The Heads of the Valley Strategy and strategic importance placed on the A465 by the Wales Spatial Plan
- WAG anticipated relocations
- The impact of future EU convergence funding
- Proposed employment floor space at the former Corus steelworks site
- WDA's property strategy and its positive influence on the market

As such, we have increased by 50% the net demand in floor space demanded by 2021. Therefore the net demand for floor space shown in Table 1 can be viewed as the minimum amount of land demanded and the figures in Table 2 are the maximum amount of employment land demanded up to 2021.

Table 2 Forecasted Changes in Employment Land Demand 2005 – 2021: Based on extra 50% growth rates from Table 1

	Total Stock of Floorspace in 2005 (m^2)	Total Stock of Floorspace Demanded in 2021 (m^2)	Net Demand in Floorspace by 2021 (m^2)	Net Demand in employment land by 2021	
				m^2	Hectares
Office (B1)	38,667	52,045	15,385	47,337	4.7
Factories (B2)	452,400	426,095	-26,305	-65,761	-6.6
Warehouses (B8)	88,833	98,217	9,384	18,767	1.9
Total	**579,900**	**576,357**	**-1,536**	**343**	**0.03**

Source: URS Calculations

Recommendations, Conclusions and Strategy

Our research identified a surplus amount of Employment Land Allocations within Blaenau Gwent. The recommendations suggest the land parcels that could be de-designated from employment uses. The recommendations also identify the best locations for the modest forecast growth in B1 and B8 uses in Blaenau Gwent up to 2021.

The recommendations result in a suggested de-designation of a total of 56.19 hectares (as set out in Table 3) of Employment Land Allocations. Individual justifications for release of these sites are shown in Section 9 of this report.

Table 3 Employment land recommended for de-designation from employment uses

Recom	ELA	location	Current Area (ha)
R2	E2 (1)	Rassau Extension (West)	33.02
R3	E2 (3)	Crown Avenue (East)	1.15
R4	E2 (6)	Bryn Serth Road	12.55
R5	E2 (7)	North of Waun-y-pound	9.47
Total Employment Land for de-designation			**56.19**

Table 3 suggests sites that are largely unsuitable as employment land allocations based on our field survey and market assessment. The actual amount of land recommended for release in Table 3 is less than that the gap between supply and demand, but as noted in Section 9 of the report, it is not always possible to find an exact fit between the targeted amount of land for de-designation and the actual amount of land that is appropriate for de-designation from employment uses.

Conclusions and Strategy Focus up to 2021

In order to satisfy the modest net demand for B8 uses in Blaenau Gwent up to 2021, we have suggested sites close to the Heads of the Valleys Road should be identified and allocated for such uses within the new development plan. It is possible that continued improvements to the Heads of the Valleys road will help stimulate distribution and logistics in the north of Blaenau Gwent, as the area will become increasingly accessible. Also, the employment land market is stronger in the north of the County Borough and the area does not suffer from adverse ground conditions to the same extent as ELAs to the south of the Heads of the Valleys Road.

The modest demand for B1 floor space during the forthcoming plan period (10,256 – 15,385 sq m) can be accommodated largely at the proposed Corus masterplan site where the current scheme has a capacity of over 60,000 sq m of commercial floor space. Market agents identify an ongoing demand for smaller business start up units and some research type facilities such as those located at Victoria Business Park. B1 floor space demand can also be accommodated as part of mixed-use residential led schemes at different locations within the County Borough.

The suggested sites for redevelopment for B8 purposes are close to the Heads of the Valleys Road and mostly within existing industrial estates. Research has identified that these sites are not ready for development as they lack the full compliment of utilities and services, so it is suggested that the Council in the next five years focuses public funding on ensuring the necessary power and utilities provision is in place to enable these sites to be developed either by the public or private sectors as soon as possible.

By investing in and preparing sites in the 5-year business plan period up to 2012, the Council will demonstrate the type of intervention that is needed to help address the typical problems of development within a deprived area such as Blaenau Gwent where the value of property and associated rental values are considerably lower than many other more affluent areas. Because of these issues there has been less incentive for private sector development to take place in Blaenau Gwent.

Consolidating the current supply of vacant employment land and by de-allocating some of the less suitable sites, as suggested within this report, there will be a better balance between the supply and demand. However, with a generous buffer of land there will still be a reasonable enough supply of sites to able some form of choice for firms.

So the strategy and role of the Council will be to allocate the most suitable sites, consolidate the supply taking account of the analysis within this report and the suggested best locations for the B1 and B8 growth sectors, prepare sites as fully as possible using public funds and taking account of business' needs, and encourage the private sector to build by proactively finding tenants.

1. INTRODUCTION

1.1. Context and Purpose

URS together with Cooke and Arkwright were commissioned by Blaenau Gwent County Borough Council (Blaenau Gwent CBC) to undertake an employment sites and premises study to assess the quantity, quality and viability of employment land throughout the Borough.

The need for such studies has been emphasised through Planning Policy Wales (PPW), which provides the strategic policy framework for effective preparation of local planning authorities' development plans. This framework is based on principles that reflect the sustainable development agenda and the priorities in the Wales Spatial Plan, which should be taken into account in the preparation of UDPs/LDPs and in the control of development throughout Wales.

In its guidance to local authorities particularly in their preparation of UDPs the PPW recommends that they *'[…] review all non-housing allocations especially where the land cannot be realistically be taken up in the quantities envisaged over the lifetime of the UDP […] and consider whether some of this land might be better used for housing or mixed use developments.'*

Furthermore Local Authorities planning authorities should ensure that:

- *'sufficient land suitable for development for enterprise and employment uses and well served by infrastructure is designated for employment so as to meet both identified and as yet unidentified needs; and that*
- *new development for enterprise and employment uses is located and implemented in accordance with sustainability principles.'*

In addition the PPW guidance suggests that key employment sites be selected in accordance with its sustainability principles in order to attract investment that could bolster the development of the local economy.

The Welsh Assembly Government's Strategic Framework for Economic Development "Wales a Vibrant Economy" refers to the following objectives:

- *increase employment still further, so that over time the Welsh employment rate matches the UK average, even as the UK employment rate itself rises; and*
- *raise the quality of jobs, so that average earnings increase and close the gap with the UK average*

In terms of localised strategy, the "Wales Spatial Plan: People, Places Futures" specifically refers to the Heads of the Valleys area and Ebbw Vale in particular. It states that:

'Merthyr Tydfil and Ebbw Vale are the key centres on the corridor, providing the population size and strategic development opportunities necessary for sustained economic development, retailing, housing and service provision. These centres should act as a catalyst for the regeneration of the upper valleys helping to retain and attract a socially mixed population and provide a counterweight to the coastal urban areas'.

According to "Turning Heads: A Strategy for the Heads of the Valleys 2020", to be successful in the future, *'the Heads of the Valleys need a mix of strong employment opportunities and distinctive communities that are attractive, accessible, and offer an excellent quality of life in an improved natural environment. Identified centres of economic growth and employment must be complemented by a network of connected communities providing a mix of housing, retail and leisure/tourism facilities and supporting a broad range of high quality public services" (Turning Heads: A Strategy for the Heads of the Valleys 2020.'*

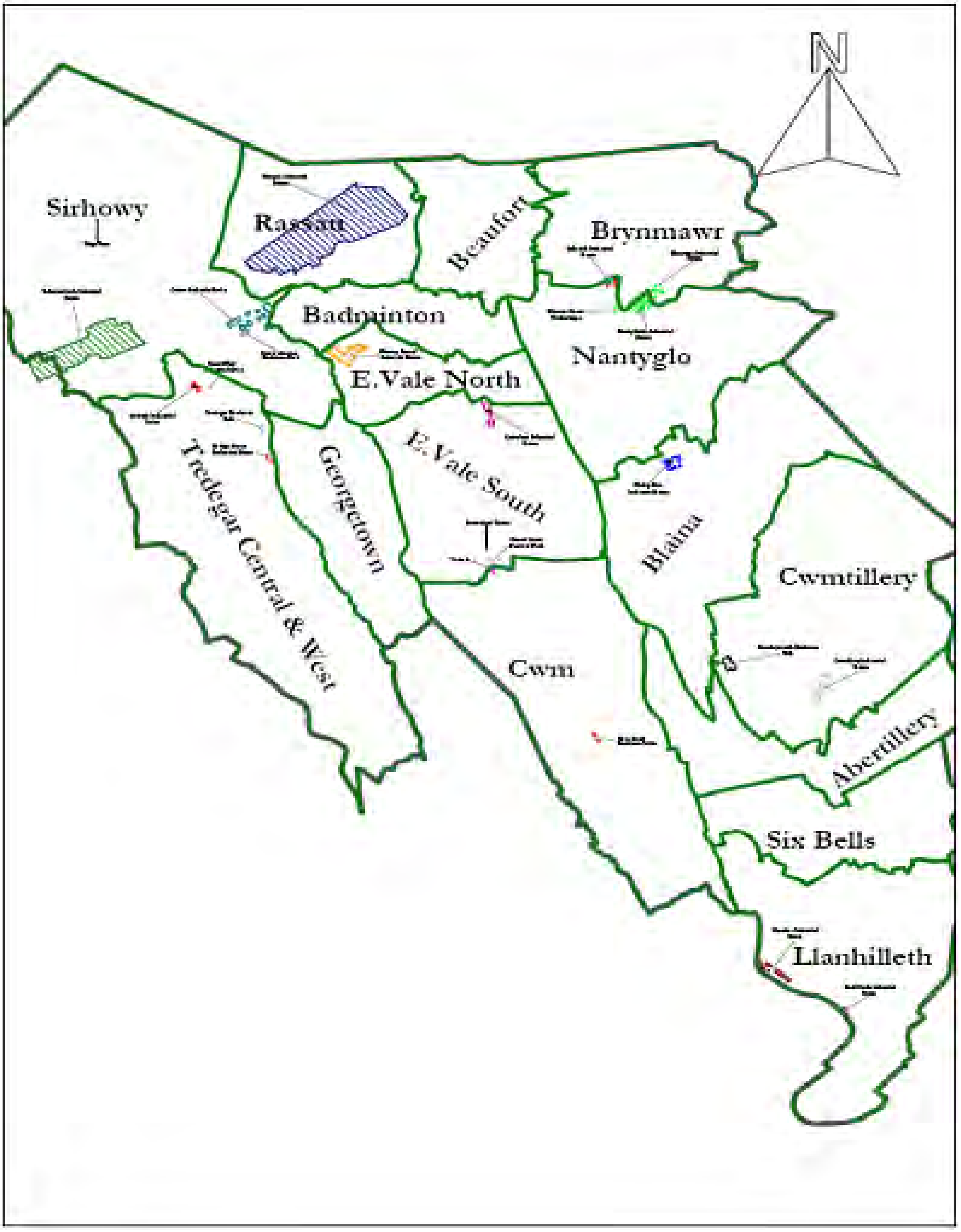
Blaenau Gwent County Borough Council is in the early phases of researching and preparing its Local Development Plan (LDP) and this study forms an element of this work.

1.2. Study Area

The study area included the whole of the Blaenau Gwent CB. The majority of Employment Land Allocations[3] and existing industrial areas are located in the north of the County Borough in close proximity to the A465 (the Heads of the valley Road). All other Employment Land Allocations and existing industrial areas are located south of the A465, in close proximity to the A4048, the A4046 and the A467.

[3] As per policy E2 of the adopted BGCBC Unitary Development Plan (July 2006).

Figure 1.1: Blaenau Gwent County Borough administrative areas and exiting industrial estates[4]



Source: Blaenau Gwent County Borough Council

[4] Note unfortunately the provided j-peg cannot be enlarged sufficiently to see the names of the industrial sites, but the plan is useful in that is shows the spatial distribution of existing industrial estates, including clusters in the north of the County Borough.

1.3. Report Structure

This report sets out our draft findings and policy recommendations for employment site and premises the County Borough of Blaenau Gwent based on a comprehensive desk review and socio-economic analysis; individual employment site appraisals; a review of historical trends in the commercial and industrial property sectors; and an employment forecasting exercise.

The remainder of this report is structured as follows:

- Section 2 gives details of our approach to the various research elements of the assignment;
- Section 3 describes the national, regional and local policy context of particular relevance to employment land and related issues in Blaenau Gwent County Borough Council;
- Section 4 gives a brief review of key research reports relevant to this study;
- Section 5 provides a comprehensive analysis of socio-economic baseline conditions in Blaenau Gwent County Borough relative to Wales and Great Britain;
- Section 6 describes the key findings of our employment area appraisals and summarises the key qualitative and quantitative results;
- Section 7 gives an overview of the employment land market in Blaenau Gwent County Borough outlining the historical trends in the commercial and industrial property sectors;
- Section 8 sets out our employment land demand forecasts; and
- Section 9 presents conclusions and recommendations on retention and release of employment sites, plus presents the business framework.

2. APPROACH

2.1. Introduction

There are a number of research elements informing this study, which are outlined in more detail below. These included:

- Review of policy and literature
- Employment and business profiling
- Employment land surveying and appraisal
- Market and demand assessment
- Employment land forecasting exercise

2.2. Review of Policy and Literature

A review of relevant policies and literature was undertaken to ensure the findings and recommendations were in line with current national, regional and local policies. The relevant documents to review were agreed with Blaenau Gwent CBC.

2.3. Employment and Business Profiling

A broader socio-economic analysis was undertaken of Blaenau Gwent CBC within the context of Wales and Great Britain as a whole in order to provide an in depth understanding of the current population and socio-economic make-up of Blaenau Gwent CB. A number of information sources were reviewed including:

- Annual Business Inquiry;
- Census Data;
- Local Labour Force Survey;
- Annual Survey of Hours and Earnings (ASHE); and
- VAT Registrations.

An employment profile of the Blaenau Gwent CB was developed. This profile included:

- An overall socio-economic profile of the area;
- A review of historical employment information for the area, including information on workforce characteristics, unemployment, occupation, earnings and travel to work information; and
- A review of the local economy and business trends within Blaenau Gwent CB.

2.4. Employment Land Survey and Site Appraisals

This work began with a desk-based review of the existing Employment Land Allocations (ELAs) within Blaenau Gwent CB (Policy E2 sites of the UDP) in order to identify sites to be targeted for survey, along with the broad employment area opportunities and constraints. UDP policy numbers E2 (1) to E2 (30) formed the focus of the field survey as these consisted of vacant sites ready for development. Also identified through the desk-based review were the boundaries of the existing industrial and commercial areas within the County Borough.

Identified ELAs and existing industrial and commercial areas were then grouped into 14 clearly defined employment clusters. The Blaenau Gwent CBC Employment Areas inset map attached at the rear of this document shows the location of employment clusters and ELAs.

Each employment cluster was then visited and appraised against an agreed set of economic, planning and property market criteria to assess fitness for purpose. The criteria recorded at the employment cluster level were generally common to all individual sites within them. The main attributes reviewed and recorded were:

- Site area
- Existing employment use / activity
- Developable area
- Quality of environment
- Access to facilities and amenities
- Topography and ecology issues
- Bad neighbourhood uses
- Proximity to other uses
- Servicing of businesses in the cluster
- Parking facilities
- Strategic road access
- Strategic access to public transport
- Condition of buildings
- Possibilities for intensification and redevelopment

Furthermore, the ELAs[5] were appraised against the following additional criteria, to measure their sustainability, marketability and potential for being brought forward for employment use before the end of the LDF period or re-designation for a different use:

- Site area
- Policy designations
- Developable area
- Strategic road access
- Local road access
- Access to public transport
- Access to facilities and amenities

[5] UDP policy numbers E2 (1) to E2 (30) only (vacant sites).

- Workforce catchment
- Potential ecological value
- Topographical issues
- Physical site constraints
- Any visible signs of marketing of the site
- Issues / description

The surveyors used a pro-forma questionnaire along with a map of each employment cluster to undertake the survey. The questionnaire included a series of tick-box style and open-ended questions. This approach allowed for a qualitative and quantitative analysis to be undertaken. Copies of the site survey questionnaire are included as **Appendices 1 and 2.**

Once the visual inspections were complete and the collected data entered into the database the clusters were digitally mapped using GIS to provide a geographical picture of employment land distribution throughout the Borough. The site surveys were completed in January 2007.

Current utility requirements and proposed utilities works was also researched for ELAs, pertaining to electricity, water, sewerage, gas and water. Biodiversity and flood risk issues were also assessed in relation to ELAs, through a review of maps that were provided by the County Borough Council and South East Wales Biodiversity Records Centre (SEBREC).

2.5. Market and Demand Assessment

Cooke and Arkwright undertook a review of trends in employment related development and occupancy rates by sector and location. Historic data was gathered from planning files and market information. Data was gathered, where possible, over a full business cycle in order to provide a fuller picture of potential demand over the next plan period.

URS complemented findings by speaking to other agents to find out information on:

- Characteristics of the property market
- Types of location and premises in demand
- Unique selling points of Blaenau Gwent
- Take up trends
- Influence of transport improvements on demand.

2.6. Employment Land Forecasting

A forecast for employment land demand is introduced which takes account of type and overall amount of land. As no robust data existed on the historic take up rates of offices and industrial premises it was not possible to breakdown future demand into five-year phases, but it has been possible to disaggregate demand into B type uses.

As explained in section 8, we have developed a synthesis approach to employment land demand forecasting that takes of the local context and the wider regional macro-economic context. This allows the weaknesses of other individual approach to be tackled. We build up this analysis by considering the following information:

- Floorspace forecasts
- Employment forecasts
- Synthesis forecasts

2.7. Comparison with Employment Land Supply

Finally, the forecast employment land / floorspace demand up to 2021 is compared with data on employment sites and premises supply from section 6 of the study. This results of this comparison when considered alongside all other findings from this study help inform the overall conclusions and recommendations for this report. We also considered the impact of other schemes on demand such as the regenerative impact of the new railway line and improvements to the Heads of the Valleys Road.

Prior to developing policies, URS also held a consultation exercise with local property agents, Council officers and public sector agency representatives. The purpose of this exercise was to discuss issues and interim results from the site surveys, market analysis and employment demand forecasting.

3. POLICIES AND PROGRAMMES

3.1. Introduction

This section provides a brief overview of the strategy and policy context relevant to employment and employment land in Blaenau Gwent. It also includes a review of other key documents including those supporting national and regional policy development.

3.2. National Policies

Planning Policy Wales (March 2002)

Planning Policy Wales provides the strategic policy framework for effective preparation of local planning authorities' development plans. This framework is based on principles that reflect the sustainable development agenda, which should be taken into account in the preparation of UDPs and in the control of development throughout Wales. This objective is illustrated through its recommendations that suggest that planning policies and proposals should:

'[…] Promote resource-efficient settlement patterns that minimise land-take […] especially through preference for the re-use of suitable previously developed land and buildings […].'

In its guidance to local authorities particularly in their preparation of UDPs the PPW recommends that they *'[…] review all non-housing allocations especially where the land cannot be realistically be taken up in the quantities envisaged over the lifetime of the UDP […] and consider whether some of this land might be better used for housing or mixed use developments.'*

In addition the guidance suggests that key employment sites be selected in accordance with its sustainability principles in order to attract investment that could bolster the development of the local economy.

The Welsh Assembly Government through PPW stresses its commitment to:

'to building a modern economy with a broader economic base that provides job opportunities for all and where greater use of modern technology redresses the problems of access and peripherality'.

'Gaining objective 1 status for a large part of Wales confirms the economic and social needs of those areas which have not shared the economic progress of some other parts of Wales. The number and quality of jobs needs to be increased and economic inactivity reduced, especially in less prosperous areas.'

'Identify a range and choice of sites to meet different economic and employment needs, having regard to where the private sector want to invest, and which meet, or have the potential to meet, the Assembly Government's objectives for transport and other relevant policy fields.'

Wales Spatial Plan (November 2004)

The role of the Wales Spatial Plan is to ensure the Welsh Assembly Government's policies and programmes are developed in ways, which take into account its different partners including the local government and business, and the different challenges and opportunities across Wales, to enable a truly sustainable future.

In promoting a sustainable economy the plans objectives and actions hope to provide the framework for the delivery of services.

One that is of relevance to the South East sub-region and this study is:

'[…] Employment site provision reviewed in consideration of this Plan and the WDA Property Strategy to bring forward new proposals and reallocate sites where necessary, optimise the potential of existing sites and develop proposals for the location of a Premier Business Park in South East Wales. […]'

This is in line with its vision to develop the area such that its helps to spread prosperity within the area and thereby benefiting other parts of Wales.

The Wales Spatial Plan also set sets out its aims to regenerate the Heads of the Valleys area by stating that:

'The Welsh Assembly Government will work with local authorities and the private sector to develop a coherent joint strategy to maximise the potential of the A465 corridor. This will include targeted investment in Merthyr Tydfil and Ebbw Vale so that they can drive regeneration in the Heads of the Valleys zone. The strategy will need to focus on promoting developments in housing, retail, leisure and town centres as well as in economic development.'

Welsh Development Agency (WDA) –Property Strategy

This document sets out the Welsh Assembly Government (WAG) strategy for employment sites and buildings across Wales for 2004-2008.

The Property Strategy's objective is to increase and spread economic prosperity across Wales by providing a framework, which will ensure that Wales can provide high quality employment sites and premises in the right locations for inward investors and indigenous businesses. The Strategy prioritises development of employment sites and premises and resources.

Amongst the recommendation proposed by the Strategy the one that should be considered within the context of this study states that:

'[…] There should be an urgent review of the future role of all 'employment' sites owned by the WDA (or in which they have a financial interest) to check their relevance to the strategy and, where appropriate, consider alternative future uses. A similar exercise should follow with sites outside the WDA's ownership and influence. […]'

3.3. Regional Policies

Strategic Planning Guidance South East Wales: Volume 1 & 2 (January 2000, July 2001)

This Strategic Planning Guidance for the Southeast region of Wales is intended to provide guidance that will serve numerous purposes including,

'[…] To provide a context for the preparation, consideration and revision of Unitary Development Plans (UDPs)'

The document identifies the South East Wales region as being a facilitator for economic development and suggests that Unitary Development Plans need to ensure that a sufficient portfolio of sites is genuinely available to meet economic development purposes. In doing so the UDPs have to keep in line with the PPG objectives of maximising the use of brownfield sites and ensuring that new development is environmentally acceptable and sustainable.

Amongst the recommendations made by the SPG the one of relevance to this study states that:

'Sites identified as being of strategic importance should be given a high level of protection in development plans to ensure they are used to maximise economic benefits to the region.'

3.4. Local Policies

Blaenau Gwent CBC Unitary Development Plan (UDP) (July 2006)

The Unitary Development Plan provides a framework for strategic land use planning policies for Blaenau Gwent. Its aim is to 'enhance the quality of life' of the people in the area with sustainable development at its core. This reflected through its objectives and proposals, and with particular reference to employment and employment land, that the plan hopes to encourage and intensify employment and industrial development of available allocated land. Hence, one of the important objectives is to protect and prevent employment land to change to non-industrial uses.

The UDP intends to address its strategic employment objectives related to the provision and maintenance of employment land through the following policies:

'Providing 180 hectares of land for employment to accommodate the requirements of existing businesses and a range of sites for the establishment of new businesses' and

'Maintaining the stock of business premises and sites, subject to satisfactory regard being paid to the environmental impact and, within established business areas, securing environmental improvement and development which is beneficial to established businesses. [...]'

Other relevant Council objectives include the following:

'Secure the maximum employment on available land allocated for employment/industrial development bearing in mind the need for development to be sensitive to the quality of the environment.'

'Actively encourage the growth of industrial and service sector employment to protect existing levels of employment and provide new and improved job opportunities.' (Blaenau Gwent UDP para 3.10)

4. LITERATURE REVIEW

4.1. Introduction

This section gives a brief review of key research reports including those supporting national and regional policy development.

This section provides an overview of the policies and strategies relevant to employment and employment land in BGCBC. It also includes a review of key research reports including those supporting national and regional policy development.

4.2. National

Wales: A Vibrant Economy (November 2005)

The Welsh Assembly Government's Strategic Framework for Economic Development is set out in this document, which superceeded 'A Winning Wales' (Jan 2002). It aims to address the challenges and achieve *'[…] a vibrant Welsh economy delivering strong and sustainable economic growth by providing opportunities for all.'*

In taking the vision forward the document puts forth two priorities, which include:

- *'Increase employment still further, so that over time the Welsh employment rate matches the UK average, even as the UK employment rate itself rises; and*
- *Raise the quality of jobs, so that average earnings increase and close the gap with the UK average.'*

These priorities are translated into actions such as:

- *Supporting job creation […]*
- *Investing to regenerate communities and stimulate economic growth across Wales*
- *Helping businesses to grow and to increase value-added per job and earning by […] investing in our transport networks and other economic infrastructure […].'*

These priorities and actions are of relevance to this study.

Wales: A Better Country (September 2003)

This document sets out the strategic agenda of the Welsh Assembly Government to achieve a sustainable future for Wales.

It aims to ensure that action for social, economic and environmental improvement contributes towards the strategic agenda, through the 'top ten' commitments and four key areas. Amongst the key areas for policy development include 'helping more people into jobs' and 'creating better jobs and skills'.

The economic policy set out in the document to promote *'a diverse, high added value economy, with high quality skills and education, that minimizes demands on the environment'* includes commitments such as:

- *'[…] £25m streamlined innovation grant'*, which is aimed at promoting innovation and research in business; and
- *'[…] Invest in Transport Infrastructure'* to improve transport links to support a stronger economy.

Welsh Development Agency (WDA) –Property Strategy

This document sets out the Welsh Assembly Government (WAG) strategy for employment sites and buildings across Wales for 2004-2008.

The Property Strategy's objective is to increase and spread economic prosperity across Wales by providing a framework, which will ensure that Wales can provide high quality employment sites and premises in the right locations for inward investors and indigenous businesses. The Strategy prioritises development of employment sites and premises and resources.

Amongst the recommendation proposed by the Strategy the one that should be considered within the context of this study states that:

'[…] There should be an urgent review of the future role of all 'employment' sites owned by the WDA (or in which they have a financial interest) to check their relevance to the strategy and, where appropriate, consider alternative future uses. A similar exercise should follow with sites outside the WDA's ownership and influence. […]'

4.3. Sub-Regional

South East Wales Development Strategy (February 2005)

This is a ten-year strategy that clearly sets out the issues that need to be addressed in creating and maintaining a prosperous and competitive South East Wales. The strategy's vision for South East Wales is for it to be, *'a region on the way to becoming one of the most prosperous in Europe and providing opportunities for every individual, enterprise and community to share in that prosperity.'*

The document maps out a comprehensive approach to achieving its vision, which is elaborated through the propositions set out by the framework, amongst which those of relevance are:

- *'[…] South East Wales will develop very strong business and academic links to the high-growth, high-innovation, knowledge economies of Europe […].*
- *Within 10 years, South East Wales will have seen the emergence or transformation of a limited number of key sectors, featuring innovative firms generating sustained profits growth for investment. Between them they will have significantly improved the region's growth rate.*
- *In 10 years' time, South East Wales will be regarded as a new addition to the list of European regions that are particularly fertile places in which to locate or grow an innovative business. […]'*

Five Counties Regeneration Framework: Final Report (February 2002)

The regeneration framework's vision for the Five Counties of Torfaen, Caerphilly, Monmouthshire, Newport and Blaenau Gwent, is 'The Five Counties: Smart, Successful and Well connected.' The report summarises the challenges and opportunities facing these five counties and proposes four principles that help realise the vision:

- *'Create a sustainable knowledge-based economy;*
- *Establish an integrated and well-connected sub-region;*
- *Build a lifelong learning culture; and*
- *Re-establish our towns as centres of economic activity.'*

These regeneration principles are supported by a Strategy and Action Plan, which comprise numerous elements that includes amongst others, Supporting Businesses, 'Encouraging Innovation' and 'Encouraging Entrepreneurship', which aim to maximise the economic potential of the five counties. In 'Supporting Businesses', the report refers to the importance of 'Quality Business Sites and Premises' in supporting emerging industries and hence recommends that the Welsh Assembly Government should:

- *'Invite the WDA and the five local authorities to confirm that they are proceeding with the implementation of the industrial and business property development projects […].*
- *Invite the WDA and the five local authorities to confirm that they intend to proceed with the office development programme […].*'

4.4. Local

Blaenau Gwent County Borough Community Plan (2005)

The Blaenau Gwent Community Plan sets out strategies and action plans to develop partnerships with local communities, voluntary and business sectors, the local authority and other agencies in order to meet community needs and ambitions and make the area a better place to live, work and visit.

The plan identifies Key Actions Areas, such as regeneration where the aim is to *'[…] create sustainable and vibrant communities',* which will *'[…] ensure that a highly skilled and trained workforce is developed, with access to well paid jobs and that choice of high quality housing is available together with excellent communication links and a green environment in which to live work and visit',* in order to improve the image of the area and help attract inward investment.

This vision is carried forward through certain specific aims and ones of relevance to this study includes:

- *'Safeguard existing employment (500 jobs) and support creation of new manufacturing and service employment by creating 250 new jobs and assisting 300 businesses.*
- *Increase the employment and economic activity rates to 66% for employment and 71% for economic activity.*
- *Develop a Marketing Strategy to attract and retain investment and business.'*

Blaenau Gwent Draft Regeneration Strategy (August 2006)

The Draft Regeneration Strategy aims to bring together and carry forward the ideas, strategies and programmes from various other strategies for Blaenau Gwent. The vision for this strategy reiterates the aspirations of the Blaenau Gwent Community Plan and is elaborated under three major themes, which include:

- Unlocking the Potential of Our People
- Unlocking the Potential of Our Places
- Building a Confident Future

Under these three themes there are 11 Action Programmes, with sub-programmes and individual projects. The action programmes under the second theme of 'Unlocking the Potential of Our Places' is of most relevance to this study.

'Action Programme 6', which aims to make better use of physical resources has a key aim of 'ensuring provision of an adequate choice of suitable sites and premises for developments, in line with the Blaenau Gwent Economic Development Strategy.' This programme entails sub-programmes and projects that look at refurbishment of old and new business units, brownfield site remediation and sustainable development projects.

In addition, 'Action Programme 8' has an aim of 'promoting innovation & growing business'. It seeks to support existing business, diversify the economy and encourage entrepreneurship.

Blaenau Gwent Local Transport Plan

The Local Transport Plan builds on work already done in identifying transport priorities by setting out ways in which integrated transport will be delivered at the local level. There are five central aims to the Plan, amongst which is the need for 'a transport system which enables and supports sustainable development.'

The plan complements the UDP's and other strategies' focus on regeneration, where the aim is to revitalise the economy, improve the physical environment and strengthen community action. These aims will be supported through an efficient and integrated transport system that promotes sustainable development. The plan's 'Strategic Transport Policy - Integrated Transport Strategy (T1)' policy, further emphasises this as it aims to prioritise:

'Co-ordinating land use change with transport provision so as to minimise the need to travel and to locate new development where it can be accommodated by the highway network.'

The plan also mentions of a study undertaken in June 1999 that established the technical and operational feasibility of a re-introduction of a passenger rail service on the existing freight line between Ebbw Vale and Newport. This was followed by another study to determine the financial and economic feasibility of the proposal, which would contribute towards the Strategic Transport Policy.

The proposed £30m Ebbw Vale-Newport line is now becoming a reality and is due to open later this year. The service will give better commuting opportunities to people in Blaenau Gwent and it is hoped it will open up the valleys and attract jobs into the area.

Heads of the Valley Strategy (June 2006)

'Turning Heads… A Strategy for the Heads of the Valley 2020' aims to rejuvenate the partnerships between the public, private and voluntary/community sectors through its vision for the area. The strategy identifies some opportunities including:

- *'The upgrading of the A465 Heads of the Valley road and rail links to Newport/Cardiff*
- *Positive developments in the South East Wales Labour market*
- *Continued major public investment […]'*

These opportunities are developed in strategic goals and programmes that are based on five priority themes. Amongst these themes is the key Strategic Programme (SP) to create *'A vibrant economic landscape offering new* opportunities.' This involves the following programmes, which are relevance to this study:

- *'SP4: Directly linking people with work*
- *SP5: Joined-up solution for business*
- *SP6: Linked opportunities for businesses and individuals.'*

Through these programmes the strategy aims for:

- *'[…] Better road and rail links and public transport*
- *More and diverse employment opportunities*
- *More social enterprises*
- Greater levels of innovation and entrepreneurship'

Generally the strategy stresses it believes that employment is the key to regenerating the Heads of the Valley area.

5. SOCIO-ECONOMIC STRUCTURE

5.1. Introduction

It is helpful to consider current demand and future provision of employment land in the context of the socio-economic structure of the area. Creating sustainable communities includes providing for employment suitable to the local workforce. Therefore this section analyses the socio-economic structure of the County Borough of Blaenau Gwent and makes some comparisons with the rest of the South East of Wales and Great Britain (or Wales where data for Great Britain was unavailable).

5.2. Population

Since the 1991 Census Survey, Blaenau Gwent has experienced a population decline of 3%, which is representative of the trend in South Wales. The 2005 Mid-Year Estimate figures suggest that 68,400 people live in the area. However, this decline in population is in contrast to the whole of Wales, which saw an 2.4% increase in its population over the last decade.

Blaenau Gwent's gender split is 51.8% female and 48.2 % male, which is similar to the whole of Wales. Mid-Year Estimate figures for Blaenau Gwent's age structure shows that 20% of the population is of retirement age or over and the highest proportion of people is between 16 and 44 years old. Approximately 44% of Blaenau Gwent's population aged 16 years and over are married, which is consistent with the Welsh average. Less than 1% of Blaenau Gwent's population is made up of non-white ethnic groups, below the Welsh average of 2%. Similarly, 9% of the population were migrants[6] in comparison to 11% for the whole of Wales.

There are 29,585 occupied households in Blaenau Gwent with a vacancy rate of 6% and an average household size of 2.4 people. The housing tenure is constituted of 62.6% owner occupied households, which is the lowest owner occupancy rate of all the Welsh local authorities. The remaining 37.4% of the households are either Council or Registered Social Landlord managed.

Table 5.1 Summary of Population Characteristics

(% Of population)	***Blaenau Gwent***	***Wales***
Age Groups (Mid-Year Estimates)		
<5	5.3	5.5
5-15	15.2	14.2
16-44	37.2	37.5
45-Retirement Age	22.4	22.6
Retirement Age>	20.0	20.3
(% Of households)		
Tenure		

[6] Migrants are defined as the people that had a different address one year before the census to that on they had on Census Day 2001.

Owner Occupied	62.6	71.3
Council or RSL	28.8	17.9
Private Rented or Other	8.5	10.7
Vacancy	6	4

Source: ONS, Census 2001

5.3. Workforce

In Blaenau Gwent 59.8% of the total population are of working age. According to the midyear estimates 70.8% of the people aged 16 years and over were economically active in 2005, which is slightly lesser than the Wales and Great Britain figures of 75% and 78.3%, respectively.

Of the 11,900 economically inactive people in Blaenau Gwent, women account for 57.1% and men 42.9%. Furthermore 19.3% of the economically inactive are considered not to want a job, which is higher than the average percentage in Wales (18.8%) and Great Britain (16.3%).

Blaenau Gwent's workforce is employed in a range of occupations with the highest proportions employed in elementary occupations (18%) and process plant & machine operatives (15.4%), which is reflective of the predominant manufacturing industry in the area.

Table 5.2 Employment by Occupation

	Blaenau Gwent (numbers)	*Blaenau Gwent (%)*	*Wales (%)*	*Great Britain (%)*
Managers and senior officials	2,500	9.1	12.2	14.9
Professional occupations	1,500	5.7	11.2	12.7
Associate professional & technical	3,000	11.2	13.3	14.3
Administrative & secretarial	3,100	11.3	12.2	12.5
Skilled trades occupations	2,700	9.9	12.2	10.9
Personal service occupations	2,900	10.8	8.4	7.9
Sales and customer service	2,100	7.8	8.4	7.7
Process plant & machine operatives	4,200	15.4	8.8	7.5
Elementary occupations	4,900	18.0	12.9	11.4

Source: Local Authority Profile for Blaenau Gwent, ONS 2005

Earnings by Residents

In 2006, the average gross weekly earnings of full-time workers in Blaenau Gwent are £346, with men earning approximately 1.5 more than women. The average earnings for Wales and Great Britain are also considerably higher than that of Blaenau Gwent.

Table 5.3 Average Gross Weekly Earnings

	Blaenau Gwent (£s)	***Wales (£s)***	***Great Britain (£s)***
Gross Weekly Pay			
Full Time Workers (FTW)	***346.1***	***408.0***	***449.6***
Male FTW	***402.9***	***448.4***	***490.5***
Female FTW	***267.2***	***353.7***	***387.6***

Source: Annual Survey of Hours and Earnings, 2004

Travel to Work

According to the 2001 Census, the main form of transport to work for those employed in Blaenau Gwent was by car or van, with three-quarters of the 25,133 employees either driving to work or travelling as a passenger in a car or van. The next most preferred method of travel was by foot (12.5%). **Table 5.4** below summarises how Blaenau Gwent residents travelled to work at the time of the last Census. It is assumed that this pattern would be relatively unchanged since then.

Table 5.4 Travel to Work

Method of Travel	***Number of People***	***% in employment***
Works mainly at or from home	***1,433***	***5.7***
Rail, underground, metro, light rail or tram	***75***	***0.3***
Bus, minibus or coach	***1,005***	***4.0***
Taxi or minicab	***201***	***0.8***
Driving or passenger in a car or van	***18,900***	***75.2***
Motorcycle, scooter or moped	***151***	***0.6***
Bicycle	***151***	***0.6***
On foot	***3,142***	***12.5***
Other	***75***	***0.3***

Source: Origin-Destination Statistics for local authorities, 2001 Census

5.4. Local Economy and Businesses

Introduction

This section provides a profile of the prevailing economic and employment conditions in Blaenau Gwent. It provides the economic context to employment land demand and supply factors, providing an overview of trends and emerging growth sectors in the area.

Employment

In 2004, there were 19,234 employee jobs in Blaenau Gwent of which 67.7% worked full-time. This is a considerable decrease since the 2001 census proportion of 82%.

Employment during the 2001 census was dominated by the manufacturing industry, where approximately 33% of the people employed in Blaenau Gwent worked. Over the past decade the trend has changed and according to the 2004 annual business inquiry, majority of the employed people work in the service sectors (67.3%). Manufacturing industry has seen a drastic decrease in employee jobs (-40.09%) since 1998, yet accounts for a significant number of the total employee jobs (5,500). **Table 5.5** below summarises the changes in Blaenau Gwent employee numbers by broad industry sector between 1998 and 2004. It should be noted that Much of manufacturing job losses in Blaenau Gwent over the 1998 – 2004 period can be attributed to the closure of the Corus Steel works in Ebbw vale which resulted in 800 people being made redundant.

Table 5.5 Employment by Industry Sector

Broad Industry Sector	***1998***	***2000***	***2002***	***2004***	***% Change***
Agriculture and fishing	38	28	0	0	-
Energy and water	4	5	1	9	55.56%
Manufacturing (B2)	7,705	7,099	6,198	5,500	-40.09%
Construction	655	1,585	723	787	16.77%
Distribution, hotels and restaurants (B8 50% only)	4,659	4,239	3,842	4,336	-7.45%
Transport and communication (B8)	476	616	721	761	37.45%
Banking, finance and insurance (B1)	929	1,812	947	1,031	9.89%
Public administration, education and health	4,268	4,698	5,242	5,761	25.92%
Other services	953	1,171	996	1,048	9.06%
Total	***19,688***	***21,253***	***18,670***	***19,234***	***-2.36%***

Source: ONS, Annual Business Inquiry

Businesses and Sectors

As a proxy for workplaces we have used ONS records of VAT registered businesses to obtain a picture of recent business activity in Blaenau Gwent.

Blaenau Gwent has seen some fluctuations over the past decade in the number of businesses in the area. Since the 2001 census the number has increased only slightly. The largest percentage increase seen between 1995 and 2005 was in the transportation and communication sector (50%) followed by the construction sector (33.33%). **Table 5.6** below sets out the change in workplaces in Blaenau Gwent between 1997 and 2005. The table does not use the same broad industrial classifications as Table 5.5 above, however, categories are similar and table 5-6 provides a good indication of business activity in the area.

Table 5.6 Change in Workplace Units 1995-2004

Broad Industry Sector	*1995*	*1997*	*1999*	*2001*	*2003*	*2005*	*% Change in no. of units*
Manufacturing	10	10	10	5	15	10	0%
Construction	10	10	15	10	15	15	33.33%
Wholesale, retail and repairs	30	20	30	20	20	35	14.29%
Hotels and restaurants	15	15	10	15	25	15	0%
Transport and communication	5	0	5	5	5	10	50.00%
Real Estate	10	10	15	10	15	10	0%
Public administration and other services	5	5	5	5	5	0	-
Education, health and social work	0	0	0	0	0	0	-
Total	***85***	***70***	***90***	***70***	***100***	***95***	***10.53%***

Source: ONS, VAT Registration/de-registrations by broad industry sector

6. QUALITY AND CHARACTERISTICS OF EMPLOYMENT LAND

6.1. Introduction

This section provides a summary of the key findings of the field survey and associated desk based appraisal. Results are summarised to provide an overview of conditions of employment clusters and Employment Land Allocations (vacant sites as per policy E2 of the Blaenau Gwent UDP). The purpose of this exercise is to help determine the sustainability of employment clusters and ELAs for employment use.

6.2. Employment Clusters

The field survey team visited and surveyed 14 employment clusters throughout Blaenau Gwent CB, which comprises a total area of approximately 450 hectares. The employment clusters included approximately 20 separate industrial estates and 36 Employment Land Allocations as per the Blaenau Gwent UDP. The location of the employment clusters is shown in the A0 size *Blaenau Gwent County Borough Council Employment Sites & Premises inset map,* located at the rear of this document. Furthermore, site plan displaying employment clusters and ELAs are also contained within the appendices (**Appendix 3**). **Table 6.1** below lists the area, the number of allocations, and the size of the surveyed employment clusters.

Table 6.1 Surveyed Employment Clusters

Cluster No.	Industrial Estates	Area	No. of ELAs	Size (Ha.)
C1	Rassau Industrial Estate and Crown Business Park	Ebbw Vale	10	177
C2	N/A (vacant land)	Ebbw Vale, Waun-y-pound	3	51
C3	Waun-y-pound Industrial Estate	Ebbw Vale, Waun-y-pound	2	21
C4	Noble Square, Blaenant Industrial Estate, Cwmcrachen, Barleyfields Industrial Estate, Blaenau Gwent Workshops	Brynmawr	3	38
C5	Tafarnaubach Industrial Estate	Tredegar	5	66
C6	Sirohowy Hill Industrial Estate and Bridge Street Industrial Estate	Tredegar, Sirohowy	1	21
C7	Rising Sun Industrial Estate	Blaina	3	20
C8	Roseheyworth Business Park	Blaina, Bourneville	3	8
C9	Cwmtillery Industrial Estate	Abertillery	1	5
C10	Cwm Small Business Centre	Cwm	1	12
C11	Glandwr Industrial Estate	Abertillery, Glandwr	1	7
C12	Victoria Business Park, Innovation Centre and Hall Industrial Estate	Ebbw Vale	2	22
C13	Llanhilleth Industrial Estate	Abertillery, Llanhilleth	0	1
C14	N/A	Brynmawr	1	1
		Total	**36**	**450**

6.3. Employment Clusters and Condition

Of the 14 surveyed employment clusters, 11 were considered to be in good or very good condition. To receive this designation clusters had to have a majority of buildings (more than 60%) in good or very good condition. In addition, they had to be considered to have a good or very good overall quality of environment. The following criteria were used to make this judgement[7]: **Table 6.2** lists the employment clusters that were considered to be in good or very good condition based on building condition and quality of environment.

Employment clusters in Good Condition

Building condition

Very good - buildings in immaculate state, no signs of paint coming off, windows and window frames in very good condition, immediate surrounding/grounds well kept.

Good – building in good conditions, small areas where paint might come off, etc., grounds in reasonable state.

Quality of environment

Very Good – the streets and the public realm within and surrounding the area are of very good quality. There is enough street lighting and no perceived safety issues. The business area is not polluted by noise or air pollution from neighbouring uses and/or heavy street traffic.

Good – the streets and public realm within and surrounding the business area are of good quality. Nothing in the local environment seems disturbing but it does not reach the 'very good' standard (some litter, street furniture shows signs of aging, etc.) There are no perceived safety issues.

[7] The clusters are not ranked in any order based on criteria being assessed. They are listed in the order of their cluster number.

Table 6.2 Employment Clusters with majority of sites in Good and Very Good Condition

Cluster No.	Industrial Estate/Area	Size (Ha)
C1	Rassau Industrial Estate and Crown Business Park; Ebbw Vale	177
C2	Ebbw Vale, Waun-y-pound	51
C5	Tafarnaubach Industrial Estate; Tredegar	66
C6	Sirohowy Hill Industrial Estate and Bridge Street Industrial Estate; Tredegar	21
C7	Rising Sun Industrial Estate; Blaina	20
C8	Roseheyworth Business Park; Blaina	8
C9	Cwmtillery Industrial Estate; Abertillery	5
C11	Glandwr Industrial Estate; Abertillery, Glandwr	7
C12	Victoria Business Park, Innovation Centre and Hall Industrial Estate; Ebbw Vale	22
C13	Llanhilleth Industrial Estate; Abertillery, Llanhilleth	1
C14	Brynmawr	1
	Total	**378**
	% of surveyed employment land	**84**

Source: URS Blaenau Gwent Field Survey

Employment Clusters in Poor or Very Poor Condition

The remaining 3 of the 14 employment clusters were considered to be in poor or very poor condition. To receive this designation clusters had to have a percentage of buildings (more than 40%) in poor or very poor condition. In addition, they had to be considered to have a poor or very poor overall quality of environment. The following criteria were used to make this judgement. **Table 6.3** lists the employment clusters that were considered to be in poor or very poor condition based on building condition and quality of environment.

Building condition

Poor – paint coming off, some cracks, windows in poor state, surroundings are poorly kept.

Very Poor – building still in use but in very poor condition; paint coming off in large areas, some windows broken, surroundings not maintained and/or littered and/or cluttered with rubbish.

Quality of environment

Poor – the streets and the public realm within and surrounding the business area are of poor quality (some potholes, some litter, poorly maintained or damaged street furniture). There is not enough street lighting and some perceived safety issues. The business area might be polluted by some noise or air pollution from neighbouring uses and/or heavy street traffic.

Very poor – the streets and the public realm within and surrounding the business area are of very poor quality (potholes, litter on street, not collected rubbish, etc.) There is not enough street lighting and there are perceived safety issues. There is noise and/or air pollution from neighbouring uses and/or heavy street traffic.

Table 6.3 Employment Clusters with majority of sites in Poor to Very Poor Condition

Cluster No.	Industrial Estate/Area	Size (Ha)
C3	Waun-y-pound Industrial Estate; Ebbw Vale and Waun-y-pound	21
C4	Noble Square, Blaenant Industrial Estate, Cwmcrachen, Barleyfields Industrial Estate and Blaenau Gwent Workshops; Brynmawr	38
C10	Cwm Small Business Centre; Cwm	12
	Total	**71**
	% of surveyed employment land	**16**

Source: URS Blaenau Gwent Field Survey

6.4. Measuring the sustainability of ELAs

The field survey team surveyed and appraised all vacant Employment Land Allocations[8] (vacant employment land) within Blaenau Gwent CB to determine their sustainability for employment uses.

Vacant Employment Land Allocations are displayed in **Table 6.4** below. In total our survey identified 33 vacant sites within the identified employment clusters, which are listed below in order of location. These sites covered a total area of around 166 hectares.

Table 6.4 Employment Land Allocations

Cluster No.	ELAs / vacant sites	Location	Size (Ha)[9]
1	E2 (1)	Rassau, Ebbw Vale	33.02
1	E2 (2)	Tredegar	2
1	E2 (3)	Tredegar	1.15
1	E2 (4)	Rassau, Tredegar	8.13
1	E2 (22) B	Tredegar	2.58
1	E2 (22) D	Tredegar	2.58
1	E2 (24)	Rassau, Tredegar	11.55
1	E2 (25)	Rassau, Tredegar	6.08
2	E2 (5)	Ebbw Vale, Waun-y-Pound	26.6
2	E2 (6)	Ebbw Vale, Waun-y-Pound	12.55
2	E2 (7)	Ebbw Vale, Waun-y-Pound	9.47
3	E2 (8)	Waun-y-Pound	7.0
3	E2 (26) C	Waun-y-Pound	0.6

[8] UDP policy numbers E2 (1) to E2 (30).

[9] Sizes reflect actual site areas from GIS map, as recorded and updated as part of URS field survey.

Cluster No.	ELAs / vacant sites	Location	Size (Ha)[9]
3	E2 (26) N	Waun-y-Pound	0.5
4	E2 (11)	Brynmawr	2.35
4	E2 (12)	Brynmawr	0.52
4	E2 (16)	Brynmawr	1.5
5	E2 (17)	Tafarnaubach, Tredegar	0.7
5	E2 (18)	Tafarnaubach, Tredegar	0.5
5	E2 (19)	Tafarnaubach, Tredegar	1.08
5	E2 (20)	Tafarnaubach, Tredegar	1.22
5	E2 (21)	Tafarnaubach, Tredegar	1.75
5	New Site	Tafarnaubach, Tredegar	0.85
6	E2 (23)	Tredegar, Sirowhy	8.44
7	E2 (13)	Blaina	6.83
7	E2 (14)	Blaina	4.61
8	E2 (28)	Blaina, Bourneville	2.63
8	E2 (29)	Blaina, Bourneville	1.82
9	E2 (15)	Abertillery	0.97
10	E2 (10)	Cwm	3.84
11	E2 (30)	Glandwr, Aberltillery	0.74
12	E2 (27) C	Ebbw Vale	0.95
14	E2 (9)	Brynmawr	0.63
		Total	**165.74**

Source: URS Blaenau Gwent Field Survey

Of the 33 identified ELAs, one new vacant site was discovered which was not picked up within the UDP proposals map – this site is located within the western part of the Tafarnaubach Industrial Estate and it covers approximately 0.85 hectares (see site plans and A0 size map at rear of document). It is noted that this site sits on/ just over the County Borough boundary with Caerphilly.

6.5. Strategic Transport Access

The strategic transport accessibility of ELAs was determined both through desk based research and site visits. Criteria used to assess this include:

- Strategic road access
- Access to public transport

Strategic Road Access

Sites with good/very good strategic road access include those that can be accessed directly from the trunk road network.

The 27 ELAs in table 6.5 were considered to have good/very good strategic road access.

Table 6.5: ELAs with Good/Very Good Strategic Road Access

Cluster No.	ELAs / vacant sites	Location	Size (Ha)
1	E2 (1)	Rassau, Ebbw Vale	33.02
1	E2 (2)	Tredegar	2
1	E2 (4)	Rassau, Tredegar	8.13
1	E2 (22) B	Tredegar	2.58
1	E2 (22) D	Tredegar	2.58
1	E2 (24)	Rassau, Ebbw Vale	11.55
1	E2 (25)	Rassau, Ebbw Vale	6.08
2	E2 (5)	Ebbw Vale, Waun-y-Pound	26.6
2	E2 (6)	Ebbw Vale, Waun-y-Pound	12.55
2	E2 (7)	Ebbw Vale, Waun-y-Pound	9.47
3	E2 (8)	Waun-y-Pound	7.0
3	E2 (26) C	Waun-y-Pound	0.6
3	E2 (26) N	Waun-y-Pound	0.5
4	E2 (16)	Brynmawr	1.5
5	E2 (17)	Tafarnaubach, Tredegar	0.7
5	E2 (18)	Tafarnaubach, Tredegar	0.5
5	E2 (19)	Tafarnaubach, Tredegar	1.08
5	E2 (20)	Tafarnaubach, Tredegar	1.22
5	E2 (21)	Tafarnaubach, Tredegar	1.75
5	New Site	Tafarnaubach, Tredegar	0.85
6	E2 (23)	Tredegar, Sirowhy	8.44
7	E2 (13)	Blaina	6.83

Cluster No.	ELAs / vacant sites	Location	Size (Ha)
7	E2 (14)	Blaina	4.61
10	E2 (10)	Cwm	3.84
11	E2 (30)	Glandwr, Aberltillery	0.74
12	E2 (27) C	Ebbw Vale	0.95
14	E2 (9)	Brynmawr	0.63
		Total	**156.3**
		% of surveyed employment land	**94**

Source: URS Blaenau Gwent Field Survey

Sites with poor/very poor strategic road access can be accessed only indirectly through local roads, and in many cases through residential areas.

The following six ELAs were considered to have poor or very poor strategic road access:

Table 6.6: ELAs with Poor/Very Poor Strategic Road Access

Cluster No.	ELAs / vacant sites	Location	Size (Ha)
4	E2 (11)	Brynmawr	2.35
9	E2 (15)	Abertillery	0.97
8	E2 (29)	Blaina, Bourneville	1.82
1	E2 (3)	Tredegar	1.15
4	E2 (12)	Brynmawr	0.52
8	E2 (28)	Blaina, Bourneville	2.63
		Total	**9.44**
		% of surveyed employment land	**6**

Source: URS Blaenau Gwent Field Survey

Access to Public Transport

Access to public transport (buses) for ELAs was also assessed during the site survey visits and through subsequent desk-based research.

ELAs that were considered to have good or very good access to public transport should be under approximately fifteen minutes walk from a bus stop. These included the following 17 ELAs:

Table 6.7: ELAs with Good or Very Good Public Transport Access

Cluster No.	ELAs / vacant sites	Location	Size (Ha)
1	E2 (2)	Tredegar	2
1	E2 (3)	Tredegar	1.15
1	E2 (22) B	Tredegar	2.58
1	E2 (22) D	Tredegar	2.58
1	E2 (25)	Rassau, Ebbw Vale	6.08
2	E2 (5)	Ebbw Vale, Waun-y-Pound	26.6
3	E2 (8)	Waun-y-Pound	7.0
3	E2 (26) C	Waun-y-Pound	0.6
3	E2 (26) N	Waun-y-Pound	0.5
4	E2 (11)	Brynmawr	2.35
4	E2 (12)	Brynmawr	0.52
8	E2 (28)	Blaina, Bourneville	2.63
8	E2 (29)	Blaina, Bourneville	1.82
9	E2 (15)	Abertillery	0.97
10	E2 (10)	Cwm	3.84
12	E2 (27) C	Ebbw Vale	0.95
14	E2 (9)	Brynmawr	0.63
		Total	**62.8**
		% of surveyed employment land	**37.9**

Source: URS Blaenau Gwent Field Survey

Please note that bus route information was not available in relation to ELAs E2 (19, 17, 20, 18, 21, 30, 7, 6) and the new site at Tafarnaubach Industrial Estate, which in total comprise 17% of the surveyed ELAs. Upon this basis, 44.7% of ELAs are considered to have poor or very poor public transport access, which is defined when sites are more that fifteen minutes walk from bus stops.

6.6 Access to facilities and amenities

ELAS were also assessed in relation to their access to facilities and amenities. Five of the 33 ELAs were considered to have very good or good access to facilities and amenities which was determined through the following:

Very Good – shops, restaurants and/or cafes and personal services within the business area or can be reached in a five minute walk. There is a selection of places for lunch; there is the possibility to do some shopping during lunch.

Good – shops, restaurants and/or cafes within a 5-10 minute walk. There is some selection of places for lunch.

Table 6.8 ELAs with Good/Very Good Access to Facilities and Amenities

Cluster No.	ELAs / vacant sites	Location	Size (Ha)
4	E2 (16)	Brynmawr	1.5
6	E2 (23)	Tredegar, Sirowhy	8.44
9	E2 (15)	Abertillery	0.97
12	E2 (27) C	Ebbw Vale	0.95
14	E2 (9)	Brynmawr	0.63
		Total	**12.49**
		% of surveyed employment land	**7.5**

Source: URS Blaenau Gwent Field Survey

Upon this basis the remaining 28 ELAs were considered to have poor or very poor access to facilities or amenities. The following criteria were used to assess this:

Poor – shops, restaurants and/or cafes within a 5-10 min walk. There is a limited selection of places for lunch.

Very poor – shops, restaurants and/or cafes more than a 15 min walk away. No or very limited selection of places for lunch.

It should be noted however that industrial-type employment sites are often located away from facilities and amenities and that office-type employment sites are usually located closer to them. The majority of Blaenau Gwent's existing employment clusters and associated ELAs are industrial in nature so it is not unusual that so few are located close to facilities and amenities – many of which are close to the two centres. When for example we consider site E2 (27C) Garden Festival Wales, which is located adjacent to an office development in the form of the Victoria Business Park.

6.7 Developable site areas at ELAs

Usefully SEWEF have been able to survey the ELAs to the extent that they have determined the exact actual developable areas. This assessment is based on detailed sites surveys taking into consideration topographical, flood risk and associated constraints. URS' survey was based n the UDP Employment Land allocations and associated mapping through GIS – table 6.9 information became available after the site surveys had been undertaken. **Table 6.9** below list the currently available developable land at the ELAs:

Table 6.9 Developable site areas at ELAs

ELAs	Total Area (Ha)	Dev Area (Ha)
Adjoining Blaen-y-Cwm School	1.50	1.21
Cwmcrachen Lower	2.35	1.82
Extension To Cwm Crachen Estate	1.38	0.81
Adjoining Leo's	2.43	1.21
Bryn Serth Road	20.50	14.00
Letchworth Road	0.49	0.20
Rhyd-y-Blew	26.59	12.14
WaunPound (North & Central)	1.15	0.80
Waun-yPound	5.54	4.43
Rassau Extension (East)	11.03	7.39
Rassau Extension (West)	13.36	11.36
Rassau Plateaux: L, M, O, P, Q, R, U	8.05	5.64
Rassau Platform H	6.07	3.64
Garden Festival Wales A	1.00	0.50
Garden Festival Wales C	2.70	2.02
Marine Colliery	3.84	2.43
North of Rising Sun	6.84	3.24
Rising Sun Upper	4.61	4.05
Rose Heyworth (North)	2.70	1.21
Rose Heyworth Business Park	1.82	1.62
Tafarnaubach (Central)	0.68	0.61
Tafarnaubach (East)	1.21	0.81
Tafarnaubach (North)	1.08	1.01
Tafarnaubach (South)	1.75	0.61

Tafarnaubach (West)	1.05	0.93
Crown Business Park Platform B	1.47	0.73
Crown Business Park Platform D	1.11	0.40
Crown Business Park Platform G	2.21	1.62
Tredegar Business Park	4.01	2.89
TOTAL	138.52	89.34

Source: SEWEF (2005)

6.8 Topographical issues at ELAs

The consultants did not undertake a detailed topographical survey of sites or investigate ground conditions. However, we have since the survey been informed by the Council that all ELAs south of the Heads of the Valley Road may have adits running through them or underneath them. As such, the following sites will be constrained in some form or another:

Table 6.10 ELAs with adits

Cluster No.	ELAs / vacant sites	Location	Size (Ha)[10]
1	E2 (2)	Tredegar	2
1	E2 (3)	Tredegar	1.15
1	E2 (22) B	Tredegar	2.58
1	E2 (22) D	Tredegar	2.58
2	E2 (5)	Ebbw Vale, Waun-y-Pound	26.6
2	E2 (6)	Ebbw Vale, Waun-y-Pound	12.55
2	E2 (7)	Ebbw Vale, Waun-y-Pound	9.47
3	E2 (8)	Waun-y-Pound	7.0
3	E2 (26) C	Waun-y-Pound	0.6
3	E2 (26) N	Waun-y-Pound	0.5
4	E2 (11)	Brynmawr	2.35
4	E2 (12)	Brynmawr	0.52
4	E2 (16)	Brynmawr	1.5
6	E2 (23)	Tredegar, Sirowhy	8.44
7	E2 (13)	Blaina	6.83
7	E2 (14)	Blaina	4.61

[10] Sizes reflect actual site areas from GIS map, as recorded and updated as part of URS field survey.

Cluster No.	ELAs / vacant sites	Location	Size (Ha)[10]
8	E2 (28)	Blaina, Bourneville	2.63
8	E2 (29)	Blaina, Bourneville	1.82
9	E2 (15)	Abertillery	0.97
10	E2 (10)	Cwm	3.84
11	E2 (30)	Glandwr, Aberltillery	0.74
12	E2 (27) C	Ebbw Vale	0.95
14	E2 (9)	Brynmawr	0.63
		Total	**100.86**
		% of employment land allocations	**60.8**

6.9 Developer interest at ELAs

We also understand from the County Borough Council that a number of ELAs have been subject to developer interest recently. We have not assessed individual applications or reviewed any potential schemes but based on information we have received form the Council, have collated a list showing the ELAs that at the time of writing were subject to developer interest:

Cluster No.	ELAs / vacant sites	Location	Size (Ha)[11]
7	E2 (13)	North Rising Sun, Blaina	6.83
8	E2 (28)	Roseheyworth (North)	2.70
8	E2 (29)	Roseheyworth Business Park	1.82
10	E2 (10)	Marine Colliery, Cwm	3.84
	Former industrial site	Former Corus steel works. Ebbw Vale	60,000 sq m floor space proposed

[11] Sizes reflect actual site areas from GIS map, as recorded and updated as part of URS field survey.

7. THE EMPLOYMENT LAND MARKET

7.1. Introduction

This section of the report looks at the supply of and demand for employment land and premises both in Blaenau Gwent and the wider south Wales region of which it forms a part. It considers the markets for offices and industrial and warehouse premises looking at supply and demand issues, the balance between them and prospects for increasing employment opportunities in Blaenau Gwent in the future. The wider region is considered first.

Data sources

Four major sources of data have been used in the following sections:

- Blaenau Gwent BCB records vacant office and industrial/warehouse space and enquiries for these and available sites.
- Similar figures are kept by the Welsh Development Agency, now replaced by the Welsh Assembly Government's Department of Enterprise, Innovation and Networks, (WDA/DEIN) for all unitary authorities in Wales. Their regions of South Wales East and South Wales Valleys cover the ten unitary authority areas included in this report.
- The South East Wales Economic Forum (SEWEF) compile figures from the unitary authorities on employment land allocations.
- The FOCUS on-line information service for commercial property records (amongst other things) occupier requirements.

7.2. South-East Wales

Broad characteristics of market

The employment land market in south-east Wales has undergone major structural changes over the last 30-40 years. The earlier part of this period saw the rapid decline of dependency on the traditional primary industries of coal, steel and quarrying and its replacement with a more diverse industrial base after a period of painful transition. Government policy in the form of state aid together with EU funding has been a major driver in creating sustainable employment in the more deprived areas of the region (and in the earlier stages on the more prosperous coastal strip). This had been linked with considerable investment in physical infrastructure in the form of roads, land reclamation and advance factory programmes. In the 1990's the WDA factory estates were broken up and sold in order to allow market forces to become more unfettered and this has resulted in a widening trend of partnership working between central and local government and private interests. The large scale inward investment projects that occurred in the 1980's and 1990's have largely dried up and in many cases, existing inward investors such as Hitachi, Panasonic and Sony, have now moved on to other countries.

The Heads of the Valley programme, currently being led by the WAG, has set a series of goals aimed at regenerating the Upper Valleys area. Their economic development goals up to 2020 are to create a vibrant economy in which:

- The Heads of the Valleys region will be viewed as a nationally competitive business and investment location

- The majority of residents will be in work and contributing to the Welsh economy
- There will be an accessible and better integrated transport system, with strong North-South and cross-Valleys connections
- Residents will have access to a more diverse range of business and employment opportunities
- There will be higher levels of innovation and entrepreneurship and essential support services such as affordable and convenient childcare will be more readily available

Key locations / centres

For the purposes of this report the south-east region is defined as the following ten unitary authority areas:

Blaenau Gwent	Monmouthshire
Bridgend	Newport
Caerphilly	Rhondda Cynon Taff
Cardiff	Torfaen
Merthyr Tydfil	Vale of Glamorgan

Within this region, Cardiff is the dominant location for office space but this is followed by Newport and more recently and to a lesser extent centres such as Bridgend and Caerphilly. The development of business park sites to the immediate north and south of the M4 has also been a feature of recent office development. Beyond these areas office space is thinly distributed over the various valley settlements.

Industrial development is more evenly distributed but is now generally on the periphery of the main settlements because of the demands of modern industry, which tends to need good access to the primary road system such as the A465 Heads of the Valley road, the A470 trunk road or the M4 motorway. Such developments need level sites and local topography in the upper valleys can be adverse.

Supply

Land

SEWEF has been monitoring the allocation of employment land across the region for several years. Table 7.1 shows the number of sites and the total developable area allocated as at 1999 and 2005 for each unitary authority area.

Table 7.1 - Allocated Sites: Developable Area

	1999		2005	
	Number	Area (ha)	Number	Area (ha)
Blaenau Gwent	48	166.7	29	89.3[12]
Bridgend	47	435.4	19	219.0
Caerphilly	30	358.5	12	281.7
Cardiff	30	122.4	16	55.2
Merthyr Tydfil	19	65.0	11	34.6
Monmouthshire	23	80.8	20	71.7
Newport	74	471.4	46	313.1
Rhondda Cynon Taff	74	373.2	56	276.1
Torfaen	31	103.9	21	71.4
Vale of Glamorgan	32	189.5	24	144.3
South East Wales	408	2,366.7	254	1,556.5

Source: SEWEF

In June 2005, 11% of the number of sites in the region and 6% of the developable area were located within Blaenau Gwent.

[12] This figure refers to the actual developable area. Our field survey and section 6 analysis covers the actual employment designation, which includes land within the ELA that is un-developable. Table 6.9 lists the developable areas.

WDA/DEIN records sites that are being marketed rather than those just with an employment allocation. Table 7.2 shows available sites recorded by them in the last four years.

Table 7.2 - Available Sites: South Wales & Valleys						
		Number of Sites				
Ha	(Acres)	2003	2004	2005	2006	Chg 03-06
0-2	(0-5)	111	87	65	58	-48%
2-4	(5-10)	35	31	30	26	-26%
4-6	(10-15)	15	13	11	8	-47%
6-8	(15-20)	13	11	7	9	-31%
8-10	(20-25)	9	8	5	4	-56%
10-20	(25-50)	13	11	13	15	15%
20-40	(50-100)	9	5	4	2	-78%
40+	(100+)	7	7	7	5	-29%
Total		**212**	**173**	**142**	**127**	**-40%**

Source: WDA/DE&T

Over the last four years there has been a 40% reduction in the number of available sites across the region. The only size band where the number has increased is the 10-20 ha (25-50 acres) one where an additional two sites are now available compared with 2003.

Property

Current stock

The current stock of commercial and industrial floorspace in the south-east region is shown in Table 7.3 together with the population.

Table 7.3 - Floorspace – 2005 – Th Sq M (Mill Sq Ft)							**Population (2001)**	
	Factories	Whses	All Offices	Total Employ	% of Total			% of Total
Bl Gwent	452 (4.9)	85 (0.9)	39 (0.4)	576 (6.3)	4%		70,058	5%
Bridgend	936 (10.1)	212 (2.3)	112 (1.2)	1,260 (13.7)	10%		128,650	9%
Caerphilly	1,024 (11.0)	313 (3.4)	130 (1.4)	1,467 (16.0)	11%		169,521	12%
Cardiff	1,029 (11.1)	838 (9.0)	1,042 (11.2)	2,909 (31.7)	22%		305,340	22%
Merthyr Tydfil	323 (3.5)	79 (0.9)	62 (0.7)	464 (5.1)	4%		55,983	4%

Monmouthshire	430 (4.6)	435 (4.7)	60 (0.6)	925 (10.2)	7%		84,879	6%
Newport	1,262 (13.6)	360 (3.9)	225 (2.4)	1,847 (20.2)	14%		137,017	10%
RCT	1,230 (13.2)	392 (4.2)	196 (2.1)	1,818 (19.9)	14%		231,952	17%
Torfaen	767 (8.3)	151 (1.6)	113 (1.2)	1,031 (11.2)	8%		90,967	7%
Vale of Glam	445 (4.8)	228 (2.5)	75 (0.8)	748 (8.2)	6%		119,293	9%
Total	7,898 (85.0)	3,093 (33.3)	2,054 (22.1)	13,045 (142.4)	100%		1,393,660	100%

Source: Commercial and Industrial Floorspace and Rateable Value Statistics *Source: 2001 Census*

Blaenau Gwent has 4% of the employment floorspace in the region but 5% of the population. In particular, offices and warehouses are under represented as the county has only 2-3% of the space within these sectors.

In the period 2000-2005 the total stock of employment floorspace in south-east Wales fell by 2%. Losses in office and factory space were partially off-set by an increase in warehouses. In Blaenau Gwent, over the same period, total floorspace fell by 28% which comprised losses in industrial property of all types but an increase in office space from the previous low base. See Table 7.4.

Table 7.4 - Employment Floorspace Changes 2000-2005

	Offices	Factories	Whses	Total
Blaenau Gwent	11%	-33%	-3%[13]	-28%
S-E Wales	-6%	-6%	14%	-2%
Wales	1%	-1%	9%	1%

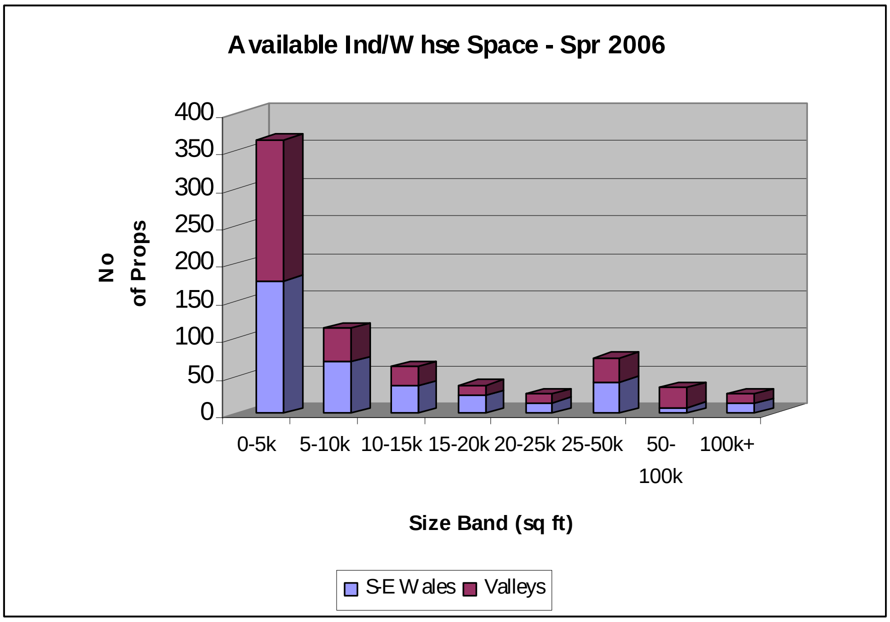
Source: Commercial and Industrial Floorspace and Rateable Value Statistics

[13] Please note that our analysis in section 8 covers a slightly longer time period over which floor space is examined, therefore while the trends for offices and industry are broadly similar, for warehouses there is a slight difference in the trends in that section 7 states a slight decrease in historic floor space trends and section 8 states a slight increase in historic floor space trends.

Available Premises

Based on statistics from WDA/DE&T, Figs 7.1 and 7.2 show the number of industrial/warehouse properties and offices in various size bands available across the region in Spring 2006.

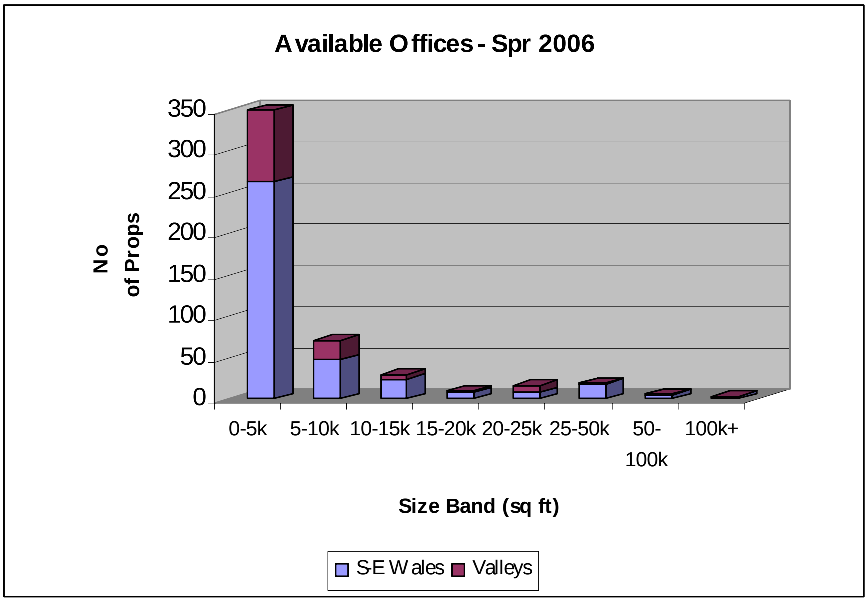
Fig 7.1 Affordable Industrial / Warehouse space



Source: WDA/DE&T

50% of the vacant industrial/warehouse properties were in sizes of less than 500 sq m (5k sq ft). This amounted to 360 properties. A further 110 properties were in the next size band (500-900 sq m, 5k-10k sq ft). For size bands larger than this, prospective occupiers had a choice of between 25 and 75 properties in each band.

Fig 7.2 Available Office space



Source: WDA/DE&T

Almost 70% of vacant offices were in sizes of less than 500 sq m (5k sq ft), a total of 350 properties. There were another 100 properties in the next two bands and a total of over 50 in sizes greater than 1,400 sq m (15k sq ft).

Tables 7.5 and 7.6 show changes in the supply of premises over the last four years for industrial/warehouse space and offices respectively.

Table 7.5 - Available Ind/Whse Properties South Wales & Valleys					
	Number of Properties				
Sq M (Sq Ft)	2003	2004	2005	2006	Chg 03-06
0-500 (0-5k)	391	303	275	366	-6%
500-900 (5-10k)	132	136	128	111	-16%
900-1,400 (10-15k)	57	74	51	52	-9%
1,400-1,900 (15-20k)	25	30	36	33	32%
1,900-2,300 (20-25k)	15	29	32	28	87%
2,300-4,600 (25-50k)	56	73	73	68	21%
4,600-9,300 (50-100k)	26	32	33	29	12%
9,300+ (100k+)	18	27	17	19	6%
Total	720	704	645	706	-2%

Table 7.6 - Available Offices South Wales & Valleys					
	Number of Properties				
Sq M (Sq Ft)	2003	2004	2005	2006	Chg 03-06
0-500 (0-5k)	235	310	315	350	49%
500-900 (5-10k)	47	49	53	67	43%
900-1,400 (10-15k)	22	23	26	36	64%
1,400-1,900 (15-20k)	16	17	14	7	-56%
1,900-2,300 (20-25k)	8	7	9	12	50%
2,300-4,600 (25-50k)	10	10	4	11	10%
4,600-9,300 (50-100k)	7	6	6	6	-14%
9,300+ (100k+)	1	2	2	3	200%
Total	346	424	429	492	42%

Source: WDA/DE&T

For industrial/warehouse space there has been a reduction in the number of units in all size bands of less than 1,400 sq m (15k sq ft) but an increase in all other sizes. The number of units of 1,900-2,300 sq m (20-25k sq ft) almost doubled over this period.

For offices there has been an increase in the number of units available in all size bands except two. The 1,400-1,900 sq m (15-20k sq ft) band saw the number of available units halve. However, the number of units in the largest band rose from one in 2003 to three in 2006. These figures reflect the trend for building new offices in positions not seen as traditional office locations such as Bocam Park in Bridgend and the success of some M4 business parks such as Cardiff Gate (Jct 30), Celtic Springs (Jct 28) and Greenmeadow Springs (Jct 32) where good take-up has encouraged the development of later phases.

Demand

Land

A detailed analysis by SEWEF shows that 79 sites totalling 281 ha of developable land across the region were either let, sold or developed between 1999 and 2005. Seven of these totalling 22 ha were in Blaenau Gwent. These are considered in more detail in section 3.2.1.

Table7.7 shows the number of enquires for commercial sites received by WDA/DE&T between 2003 and 2006.

Table 7.7 - Enquiries for Commercial Sites South Wales & Valleys						
		Number of Enquiries				
Ha	(Acres)	2003	2004	2005	2006	Change 03-06
0-2	(0-5)	110	201	126	123	12%
2-4	(5-10)	43	38	57	39	-9%

4-6	(10-15)	20	8	8	21	5%
6-8	(15-20)	12	4	10	12	0%
8-10	(20-25)	2	4	4	6	200%
10-20	(25-50)	10	10	8	15	50%
20-40	(50-100)	5	6	14	11	120%
40+	(100+)	8	4	5	3	63%
Total		210	275	232	230	10%

Source: WDA/DE&T

In 2006 the total number of enquiries for land was 10% higher than in 2003 but 16% lower than in 2004. There were three times the number of enquiries for the 8-10 ha (20-25 acre) band but this represents less than 3% of all enquiries. More than half (53%) off all enquiries in 2006 were for sites of less than 2 ha (5 acres).

Property

There is a lack of hard data on the take up of premises across the region. Cardiff and Newport City Councils compile take-up figures but other councils in the area do not. However, Tables 7.8 and 7.9 show the number of enquiries for industrial/warehouse premises and for offices respectively during the period 2003-2006.

Table 7.8 - Enquiries for Ind/Whse Properties South Wales & Valleys					
	Number of Enquiries				
Sq M (Sq Ft)	2003	2004	2005	2006	Change 03-06
0-500 (0-5k)	124	356	430	406	227%
500-900 (5-10k)	143	221	160	137	-4%
900-1,400 (10-15k)	112	65	118	109	-3%
1,400-1,900 (15-20k)	83	88	79	60	-28%
1,900-2,300 (20-25k)	41	65	60	69	68%
2,300-4,600 (25-50k)	146	183	208	165	13%
4,600-9,300 (50-100k)	97	91	173	133	37%
9,300+ (100k+)	73	40	87	96	32%
Total	819	1,109	1,315	1,175	43%

Source: WDA/DE&T

Table 7.9 - Enquiries for Offices South Wales & Valleys					
	Number of Enquiries				
Sq M (Sq Ft)	2003	2004	2005	2006	Change 03-06
0-500 (0-5k)	195	358	384	269	38%
500-900 (5-10k)	70	58	46	75	7%
900-1,400 (10-15k)	29	12	37	29	0%
1,400-1,900 (15-20k)	17	25	15	16	-6%
1,900-2,300 (20-25k)	8	8	17	18	125%
2,300-4,600 (25-50k)	42	19	65	46	10%
4,600-9,300 (50-100k)	30	2	21	24	-20%
9,300+ (100k+)	10	0	7	2	-80%
Total	401	482	562	479	19%

Source: WDA/DE&T

For industrial/warehouse premises the number of enquiries for the smallest size band increased by more than 200% in 2006 above the level seen in 2003. 53% of all enquiries were in this size band. There were also increases in the number of enquiries for all sizes larger than 1,900 sq m (20k sq ft).

For offices, 56% of all enquiries in 2006 were for sizes of less than 500m (5,000 sq ft). This was an increase of 38% above 2003 levels but 25% less than in 2004. Only two enquiries were received for the largest size compared with ten in 2003 but the number of enquiries for the 1,900-2,300 sq m (20-25k sq ft) size band more than doubled albeit from a low base.

Supply & Demand Balance

Figs 7.3 – 7.5 show the relationship between the supply of sites and premises as at Mar 2005 with the number of enquiries received during the following year. The supply side is obviously not static and units and sites will continue to become vacant and existing vacant ones be taken up but the graphs do give a good overall picture of the balance between supply and demand.

It can be seen that demand outstrips supply in all sectors and for all sizes except for the smallest offices and the largest sites. In both of these cases there is more supply than demand. In some cases eg industrial/warehouse premises of 1,900-2,300 sq m (20-25k sq ft) demand is twice as high as supply.

Fig 7.3

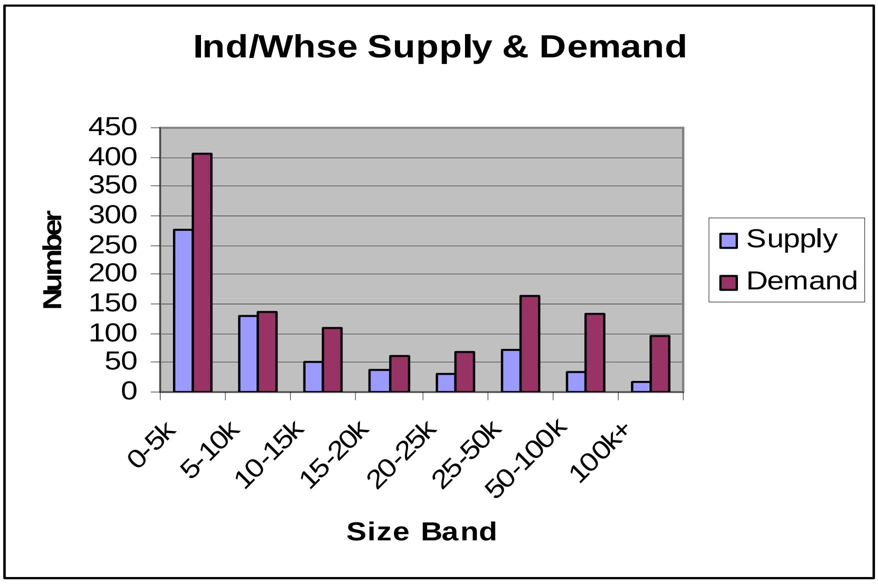


Fig 7.4

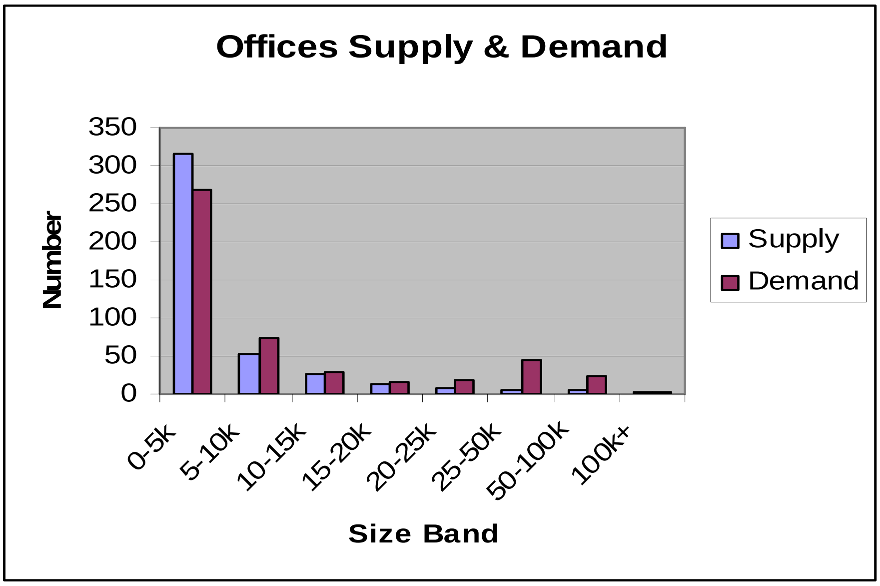
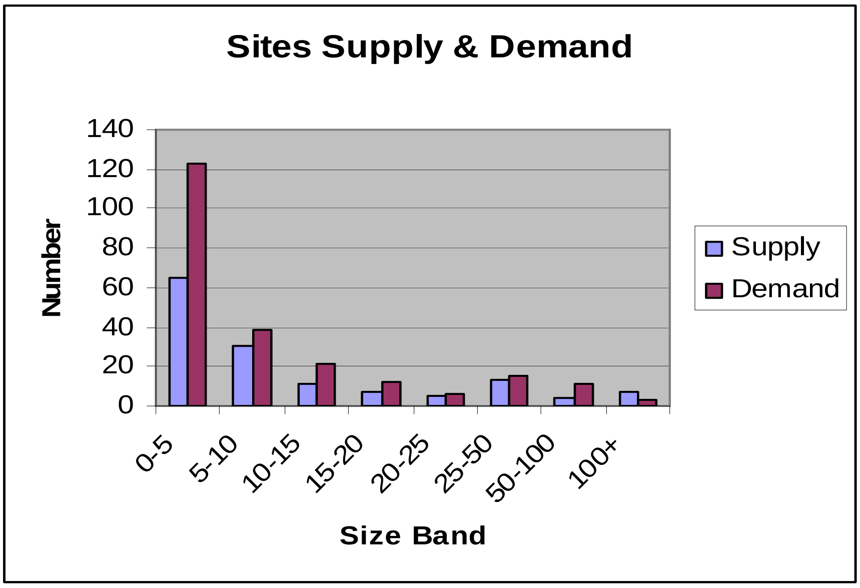


Fig 7.5



7.3. Blaenau Gwent

The Wales Spatial Plan seeks to limit competition between unitary authority areas but potential new employers will usually evaluate a number of locations locally, nationally and/or globally depending on their size. Blaenau Gwent needs a good offering to be able to attract new investment.

To facilitate a detailed analysis of supply in Blaenau Gwent, the county has been split into the following locations along the main road routes:

- North - 3 clusters along the Heads of the Valleys road ie
  - Tafarnaubach & Tredegar
  - Ebbw Vale & Rassau
  - Brynmawr
- Mid - including Blaina, Abertillery and Cwm
- South - around Llanhilleth

Supply

Land

In the preparation of the UDP, sites totalling 180 ha had been allocated for employment purposes but, of these, 58 ha had already either been developed or were firmly committed to development. A more recent analysis undertaken by SEWEF in 2005 indicated that Blaenau Gwent had 29 sites totalling 138 ha but with a developable area of 89.3 ha. This includes some sites where there was a commitment to develop. A full list of these sites is shown in Table 6.9.

Using the locations described above, the available sites fall into the areas shown in Table 7.10. The whole of Blaenau Gwent is a Tier 1 area and all sites are likely to be covered by the new Convergence Fund which replaces it.

Table 7.10 - Location of Development Sites

Location	**No of Sites**	**Developable Area (ha)**
Tafarnaubach & Tredegar	9	9.6
Ebbw Vale & Rassau	10	60.8
Brynmawr	3	3.8
Mid Valleys	7	15.1
South	0	0
Total	**29**	**89.3**

Source: SEWEF

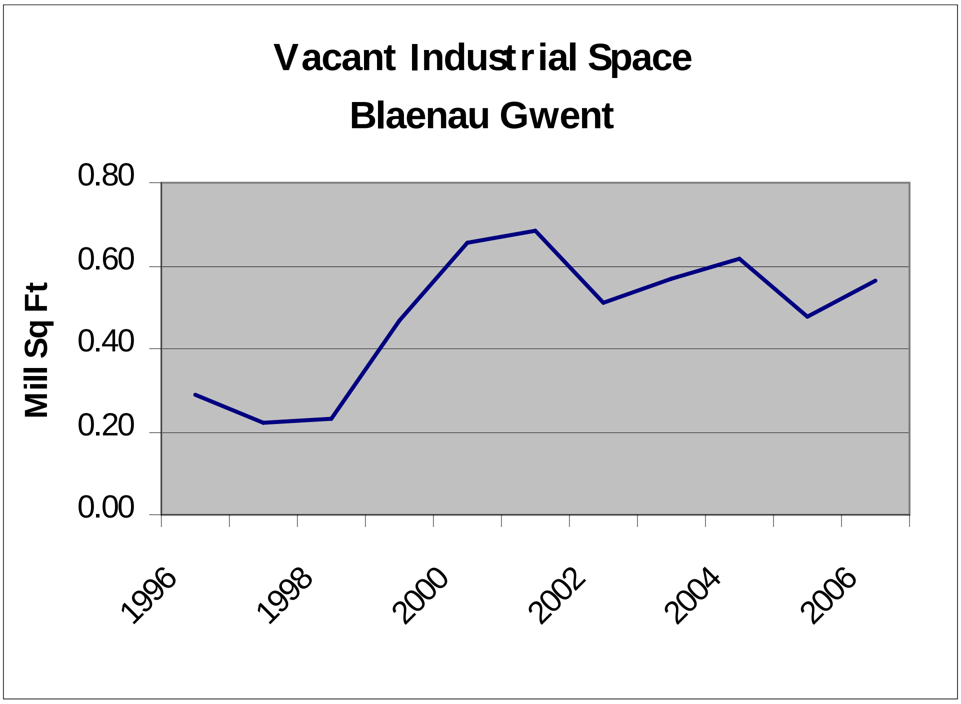
These sites range from less than 1 ha to over 26 ha (2-65 acres). 22 of them are in sizes of 4 ha or less, four are 4-10 ha and three are more than 10 ha. The three largest sites, Bryn Serth Rd, Rhyd-y-Blew and Rassau West, are all located in close proximity to the Heads of the Valleys road and would be well suited to a large inward investment project. However, with increased globalisation the chances of securing such a project have been significantly reduced.

Many of the sites are flat, well-located in relation to major highways and 20 of them are available either immediately or within one year. Of the 29 sites, 17 are owned by either the Council or by what was the WDA, now WAG. This should ensure that sites can be brought forward in a timely fashion either in response to demand or in advance of demand in an attempt to stimulate increased employment opportunities. All of the sites could accommodate B1 (offices and/or light industrial) development with 23 of them also suitable for B2 (general industrial) and B8 (warehousing).

Property

Cooke & Arkwright has been monitoring vacant industrial/warehouse space since 1996 but only for premises of 370 sq m (4,000 sq ft) and over. These long-term changes in the supply of vacant space are shown in Fig 7.6.

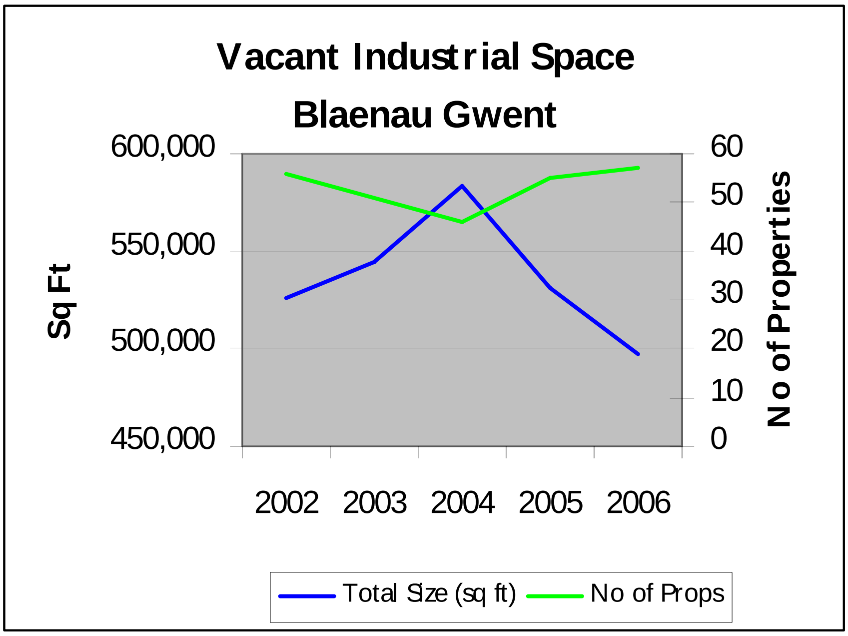
Fig 7.6



Source: Cooke & Arkwright Research

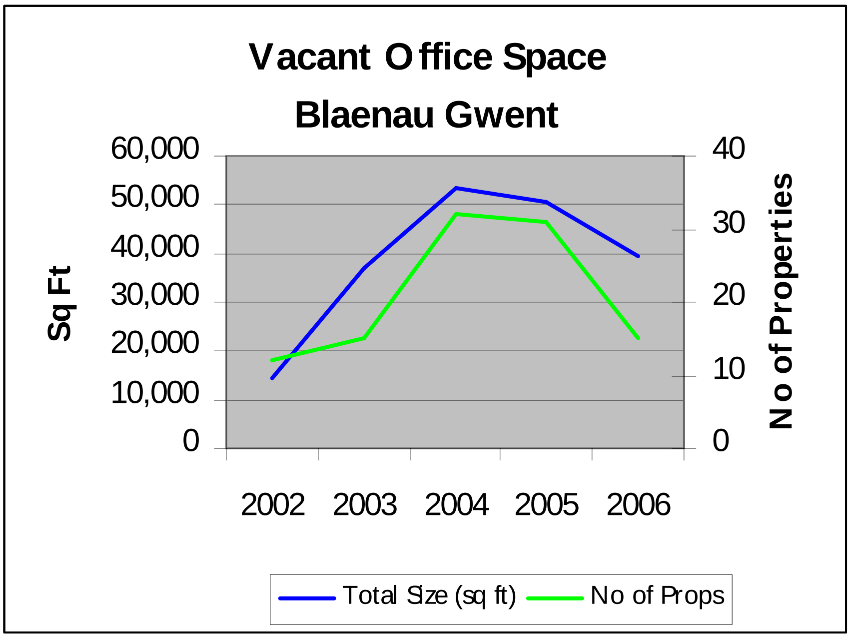
A more detailed analysis of employment space, for both offices and industrial/warehouse premises, and for all sizes has been undertaken for the last five years. These results are shown in Figs 7.7 and 7.8.

Fig 7.7



Source: BGCBC

Fig 7.8



Source: BGCBC

The industrial estates within the county offer potential occupiers a wide choice in terms of size and quality of existing premises. Some, like the older part of Barleyfields, are densely built with units that are now old and tired but therefore inexpensive. Others, like Rassau and Tafarnaubach, have modern units developed at a much lower density and can therefore offer plenty of expansion space. Sizes across the county range from small workshops to over 10,000 sq m (100k sq ft).

Office space is mainly small-scale although if a large-scale office occupier were to be interested in locating in the county there have been some buildings that could be offered. The two new units at Tredegar Park, each of 1,166 sq m (12,550 sq ft), were for some years included in the office section of the council's property register and could have been fitted out as a call centre, for instance, if a potential occupier were interested. (These have now been sold for industrial uses to owner-occupiers.)

Several schemes, for example Blaenau Gwent Workshops and the Innovation Centre at Victoria, offer managed office and workshop space for small-scale occupiers and business start-ups. These are typically let on easy-in/easy-out terms at rents that include an element of service charge.

In Autumn 2006 there was 47,350 sq m (509,600 sq ft) of industrial/warehouse space and 2,570 sq m (27,600 sq ft) of office space vacant across the county. The location of this space is shown in Table 7.11.

Table 7.11 - Vacant Space – Aut 2006

	Sq M		**Sq Ft**	
	Ind	**Offices**	**Ind**	**Offices**
Tafarnaubach	1,398		15,044	
Tredegar	6,025	382	64,852	4,109
Ebbw Vale	2,507	608	26,982	6,542
Rassau	23,595	969	253,979	10,425
Brynmawr	1,673	498	18,011	5,362
Blaina	342	112	3,680	1,209
Abertillery	2,325		25,021	
Cym	502		5,400	
Llanhilleth	8,979		96,650	
TOTAL	**47,345**	**2,568**	**509,619**	**27,647**

Source: Blaenau Gwent CBC/Cooke & Arkwright Research

The vacant space has been divided into the following size bands as these reflect the local market:

Table 7.12 – Vacant floor space

Band	Sq M	Approx Sq Ft
A (small)	Up to 200 sq m	Up to 2,000
B	201-500	2,000 – 5,000
C (medium)	501-1,000	5,000 – 10,000
D	1,001- 2,500	10,000 – 25,000
E (large)	2,501 and upwards	25,000 and upwards

The distribution across the county is shown in Table 7.13 for industrial/warehouse property and Table 7.14 for offices.

Table 7.13 - Vacant Industrial Space by Size Band
Source: Blaenau Gwent CBC/Cooke & Arkwright Research

	A (small)		B		C (med)		D		E (large)		Totals	
	No	**Sq M**	**No**	**Sq M**	**No**	**Sq M**	**No**	**Sq M**	**No**	**Sq M**	**No**	**Sq M**
Tafarnaubach			2	835	1	563					3	1,398
Tredegar	11	1,095	1	409			3	4,521			15	6,025
Ebbw Vale	1	93					2	2,414			3	2,507
Rassau	1	964					1	2,150	2	20,481	4	23,595
Brynmawr	9	814	3	859							12	1,673
Blaina			1	342							1	342
Abertillery	1	43	6	1,668	1	613					8	2,324
Cym	8	502									8	502
Llanhilleth	2	153							2	8,826	4	8,979
Totals	**33**	**3,664**	**13**	**4,113**	**2**	**1,176**	**6**	**9,085**	**4**	**29,307**	**58**	**47,345**

Table 7.14 - Vacant Office Space by Size Band
Source: Blaenau Gwent CBC/Cooke & Arkwright Research

Size Band	A (small)		B		C (med)		D		E (large)		Totals	
	No	Sq M	No	Sq M	No	Sq M	No	Sq M	No	Sq M	No	Sq M
Tafarnaubach											0	0
Tredegar	1	93	1	289							2	382
Ebbw Vale	1	13			1	595					2	608
Rassau					1	969					1	969
Brynmawr	7	266	1	232							8	498
Blaina	1	112									1	112
Abertillery											0	0
Cym											0	0
Llanhilleth											0	0
Totals	**10**	**484**	**2**	**521**	**2**	**1,564**	**0**	**0**	**0**	**0**	**14**	**2,568**

Across the county as a whole the supply of different sized units is shown in Figs 7.9 – 7.12.

Fig 7.9

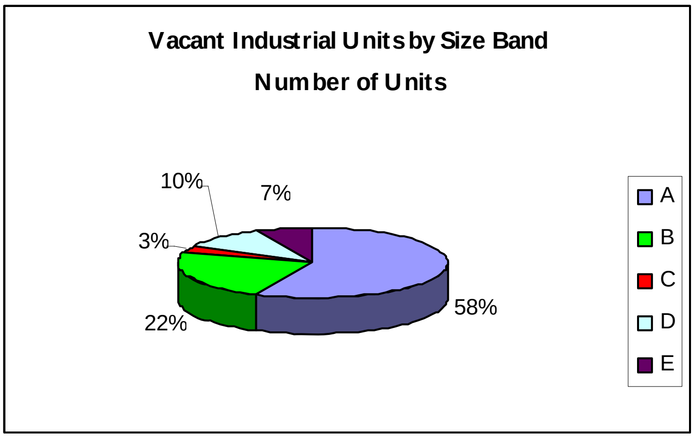
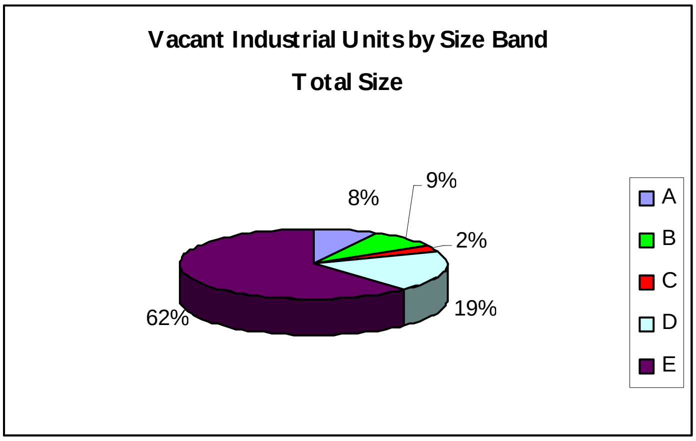


Fig 7.10



For industrial/warehouse properties, small units account for 58% of the number of units but only 8% of the total space. 7% (4 units) are in the largest size band (2,500 sq m, 25k sq ft and over) but these account for 62% of the total vacant space. The largest unit, Techboard on Rassau Industrial Estate, has been available for at least five years and has proved to be very difficult to let in its current state because the internal layout is hampered by a variety of different levels.

For offices, 72% of the number of units is in the smallest size band (upto 200 sq m, 2k sq ft) but these account for only 19% of the total floorspace. 61% of all vacant office space in the county is accounted for by two units, the Market Hall in Ebbw Vale and Enterprise House at Rassau. There are no offices in the two largest categories although, as mentioned previously, the two new units of 1,166 sq m (12,550 sq ft) at Tredegar Business Park had been promoted as either office or industrial units but have now been sold.

Fig – 7.11

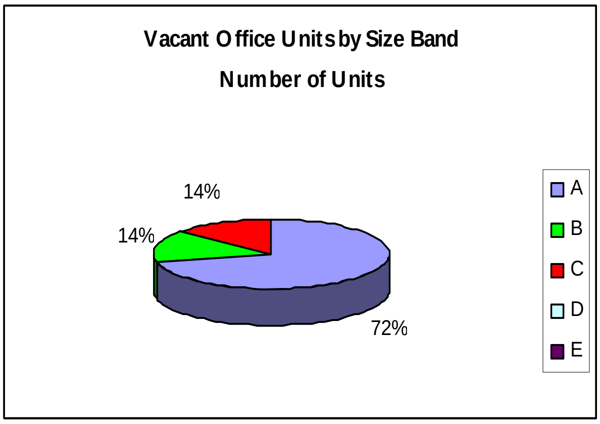
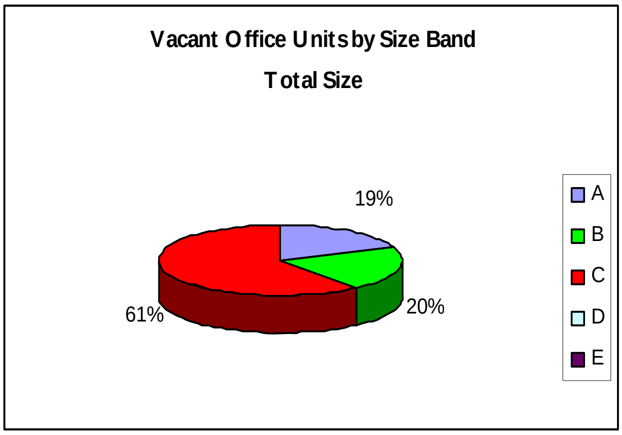


Fig – 7.12



Source: Blaenau Gwent CBC/Cooke & Arkwright Research

Whether or not this current supply of industrial/warehouse and office space is sufficient to meet the needs of potential occupiers is discussed in section 9.3.

Demand

Land

Between 1999 and 2005 a total of over 77 ha on 19 sites was removed from the SEWEF's register of sites for Blaenau Gwent. However, only seven sites totalling 22 ha were actually let, sold or developed. The remainder were either redefined, reallocated or were otherwise considered to be unavailable. These are shown in Table 7.15.

Table 7.15 - Sites Let, Sold or Developed 1999-2005			
Site Name	**Locn**	**Tot Area (Ha)**	**Dev Area (Ha)**
Former Dunlop Semtex Building	Brynmawr	7.17	6.00
West of Dunlop Semtex	Brynmawr	4.94	3.50
North of Waun Y Pound	Ebbw Vale	19.64	8.00
Waun Y Pound (North)	Ebbw Vale	1.38	1.00
Cwmtillery Valley	Mid V	2.52	2.00
Steelworks Road South	Mid V	0.97	0.40
Glandwr	Sth	1.73	1.50

Source: SEWEF

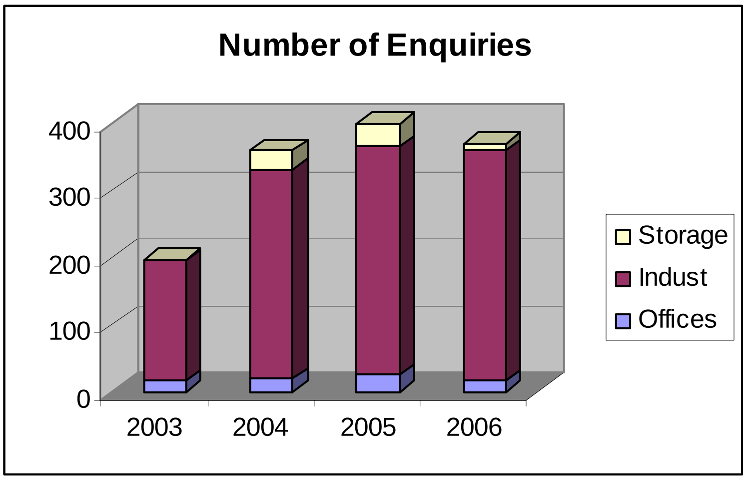
Those sites that were developed included Dunlop Semtex at Nanyglo, Waun y Pound at Ebbw Vale, Cwmtillery in the mid-Valley area and Glandwr in the south. The Semtx site, however, was sold for housing and an Asda supermarket.

Property

The estates studied generally show good occupancy rates, typically 70% or above although some buildings have failed to find occupiers for some considerable length of time. Examples of this are Techboard at Rassau Industrial Estate and Units 1 and 2 at Tredegar Business Park.

The following analysis is based on figures supplied by the Council. These figures are, however, incomplete because one size band (1,000-2,500 sq m/10-25k sq ft) is missing. They have subsequently been unable to provide the missing figures and this may skew or invalidate the analysis. The number of enquires since 2003 is shown in Fig 7.13 in the vast majority of cases it is not known if they came from those already represented in the county.

Fig 7.13 Number of Enquiries



Enquiries for space have been divided into the following size bands:

Band	Sq M	Approx Sq Ft
A (small)	upto 200 sq m	Upto 2,000
B	201-500	2,000 – 5,000
C (medium)	501-1,000	5,000 – 10,000
D	1,001- 2,500	10,000 – 25,000
E (large)	2,501 and upwards	25,000 and upwards

Tables 7.16 and 7.17 show the breakdown of these enquiries by these bands for industrial/warehouse premises and for offices respectively.

Table 7.16 - Enquiries for Industrial/Warehouse Properties
Source: BGCBC

		Number of Enquiries				
Size Band **Sq M**	**(Sq Ft)**	**2003**	**2004**	**2005**	**2006**	**Chg 03-06**
200	(< 2k)	13	30	51	77	492%
200-500	(2-5k)	8	13	22	22	175%
500-1,00	(5-10k)	4	6	15	17	325%
1,000-2,500	(10-25k)					
2,500+	(25k+)	8	14	24	18	125%
Unspecified		148	277	262	220	49%
Total		181	340	374	354	96%

Table 7.17 - Enquiries for Offices
Source: BGCBC

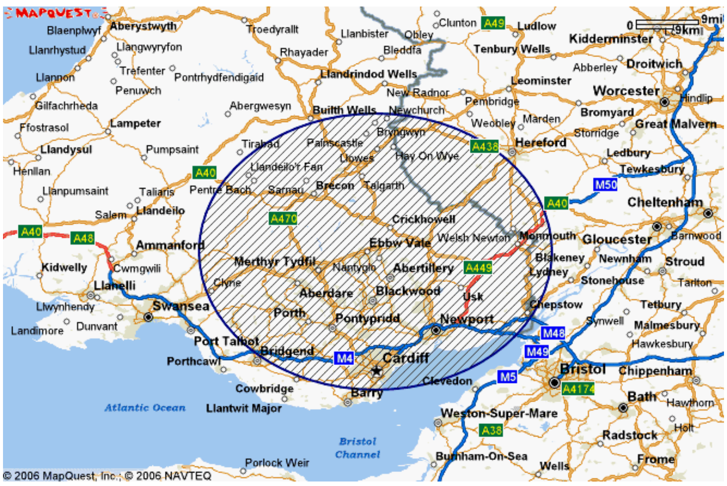
		Number of Enquiries				
Size Band **Sq M**	**(Sq Ft)**	**2003**	**2004**	**2005**	**2006**	**Chg 03-06**
200	(< 2k)	14	14	20	10	-29%
200-500	(2-5k)	0	1	1	1	
500-1,00	(5-10k)	0	0	0	0	
1,000-2,500	(10-25k)					
2,500+	(25k+)	0	2	0	0	
Unspecified		2	3	4	5	150%
Total		16	20	25	16	0%

For 60%-80% of all industrial/warehouse enquiries and 13%-30% of all office enquiries over the last four years no size has been determined. This makes it difficult to draw any firm conclusions as to the popularity of different sizes or to decide whether there is sufficient supply of the appropriate sizes to meet that demand.

In each of the past four years there have been less than 25 enquiries for office space. While it is likely that small-scale office occupiers may well by-pass the council and deal directly with agents or known providers of space, the council are likely to become aware of any potential large-scale occupiers seeking space. In 2004 there were two enquiries from inward investors for large-scale offices but no indication of where these eventually went. In future it would be beneficial if more detail were gained about enquiries and if some follow-up calls were made once those enquiries were no longer current. This could be done as part of a regular checking process.

The FOCUS on-line information service records (amongst other things) enquiries for space placed by agents and potential occupiers and allows a search to be done for requirements within a defined radius. For the purposes of this report the search area was defined as 25 miles around Ebbw Vale. The area covered extends from Barry in the south to Builth Wells in the north and from Clyne in the west to Chepstow in the east and is shown below:

Map – 7.1 Market area



Although the area does not extend as far as Bristol, the results of a search do include requirements for the Bristol area on the basis that organisations may be open to persuasion to locate in a place other than the one they originally sought.

The results of this search showed ten requirements for industrial/warehouse space, eight for the Bristol area and two for Cardiff. Both of the Cardiff ones were small (less than 186 sq m, 2k sq ft) but the Bristol ones ranged from 139 sq m (1,500 sq ft) to 3,250 sq m (35k sq ft).

For offices there were 60 requirements, seven of which included locations in the south-east Wales area. These ranged from 70-7,764 sq m (750-83k sq ft). The largest of these is a requirement for 5,110-7,764 sq m (55k-83k sq ft) in the Cwmbran area for Yes Loans recorded by Focus in September 2006. Requirements in the Bristol area range from 93-15,800 sq m (1k-170k sq ft).

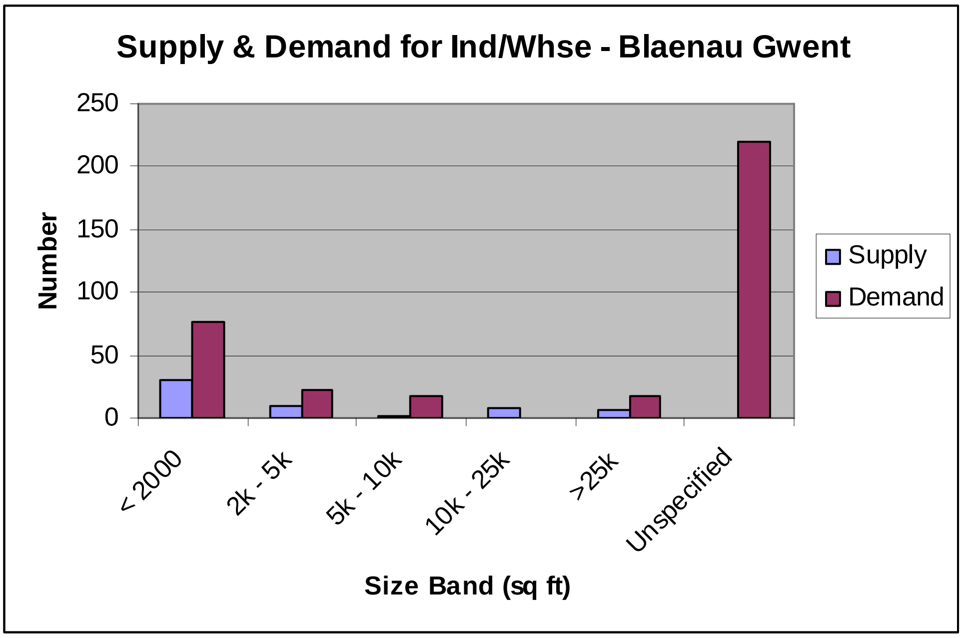
Data from Focus needs to be treated with caution as there are some anomalies. For instance, the difference in the number of requirements for offices and industrial properties displayed by them does not necessarily reflect true demand as their system registers both agent and occupier requirements for offices but only agent's requirements for industrial premises. Their data could, however, be used selectively as a source of leads in a bid to stimulate employment growth.

Supply & Demand Balance

An inspection of industrial estates in Blaenau Gwent showed good levels of occupancy but very few premises under construction. This could indicate that supply and demand are currently well balanced but it could also be the case that some types of demand cannot be met by the current supply and are therefore lost to other locations.

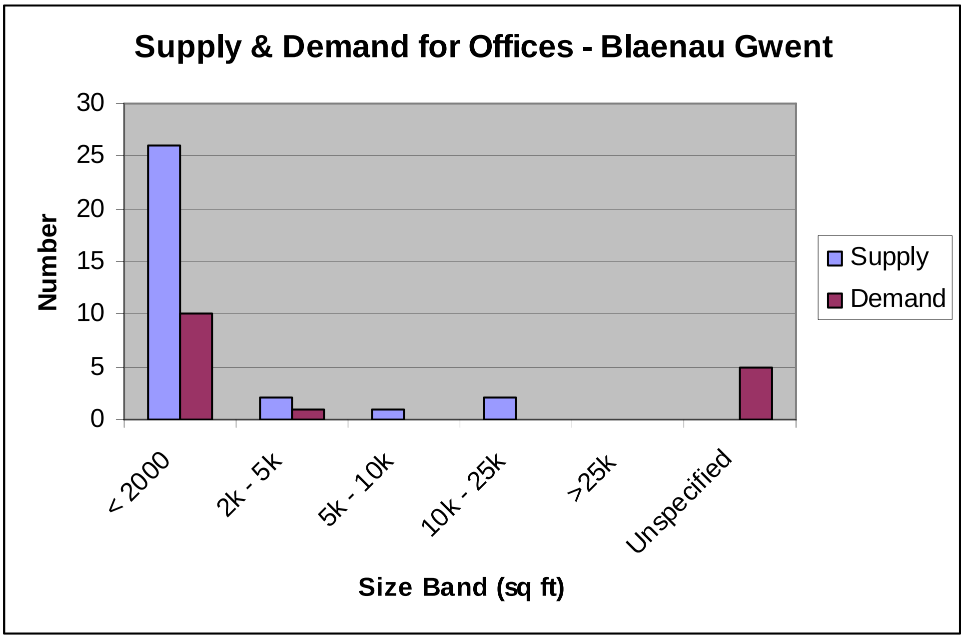
Figs 7.14 and 7.15 compare the supply of vacant space as at Autumn 1995 with enquiries for space during 2006 for industrial/warehouse premises and offices respectively.

Fig - 7.14



Source BGCBC/Cooke & Arkwright Research

Fig - 7.15



Source BGCBC/Cooke & Arkwright Research

For industrial/warehouse premises demand during 2006 outstripped supply in all size bands where a size was disclosed. However, 60% of enquiries did not specify the amount of floorspace required so it is difficult to draw any firm conclusions. Our own experience is that the majority of demand is for small workshops in size from 139-500 sq m (1,500-5k sq ft).

For offices there was only one enquiry for any space over 200 sq m (2k sq ft) but almost a third of enquiries failed to specify a size requirement. The lack of demand for large-scale offices is supported by the fact that Units 1 and 2 on Tredegar Business Park were available for a number of years and could have been fitted out as office space if demand had arisen.

Although the number of small offices appears to outstrip demand we believe that a limited development of campus-style offices in sizes of up to 370 sq m (4k sq ft) in an appropriate location such as Victoria or Tredegar Business Park would be viable if grant support and an adequate marketing period were available.

Rents

An indication of rental levels for industrial/warehouse space across the size bands is shown in Table 9.4(1).

Table – 7.18

Table 7.18 - Industrial Rents		
Size Band	**£ psm**	**£ psf**
A	£37.70-£53.80	£3.50-£5.00
B	£37.70-£45.80	£3.50-£4.25
C	£35.00-£40.40	£3.25-£3.75
D	£32.30-£35.00	£3.00-£3.25
E	£24.20-£26.90	£2.25-£2.50

Much of the small office space available in the county is within managed schemes where the rent includes an element of service charge. In the Innovation Centre at Victoria this is currently £154.50 psm (£14.35 psf) and at Blaenau Gwent Workshops approximately £107.60 psm (£10.00 psf). The larger-scale space at Enterprise House is for sale rather than to let but space in the Market Hall in Ebbw Vale has been available at £96.90 psm (£9.00 psf) and is reported as being about to go under offer.

Development pipeline

Rental levels are generally too low to enable new private-sector development to take place without gap funding but a number of developments are being pursued through the planning system. See Table 7.19.

Table 7.19 - Planning Applications & Permissions
Source: BGCBC

Application	Floorspace sq m (sq ft)
A proposed new food production unit on Tafarnaubach Industrial Estate.	
A bio-diesel plant also on Tafarnaubach Industrial Estate.	
New B1/B2/B8 units at Rassau Industrial Estate.	
B1 units on land adjacent to Cwmdraw Industrial Estate.	
A scheme for the mechanical processing of non-ferous metals at Rassau Industrial Estate.	
Two blocks of small industrial units at Cwmcrachen Industrial Estate.	
Two B1 units at Cwmdraw Industrial Estate.	
Extensions to some existing employment premises at Waun-y-Pound, Cwmdraw Industrial Estate and three units at Rassau Industrial Estate.	Total 3,700 (39,800)

Prospects for the Future

The south Wales region has undergone major changes over the last 30–40 years. These changes are still taking place and are now influenced by the emerging policies of the Welsh Assembly Government and local authorities working in partnership. The direction of the Wales Spatial Plan on a regional basis will influence the area across a variety of policies. This includes a growing view of south-east Wales as one cohesive interdependent sub-region as opposed to 10 free-standing local government areas. Other long term trends which can be envisaged are continuing growth of the main coastal settlements in terms of economic influence and especially the anticipated above-average growth in Newport which is currently the strong focus for development activity. It can be anticipated that the influence of Newport would impact beneficially on its adjacent valleys to the north in the same way that Cardiff has on the Glamorgan Valleys. The continuing improvement in the road system, especially the A465, will lead to further benefits for the Heads of the Valley areas. In this respect it should be noted that Blaenau Gwent is the most easterly of these areas and is well placed to benefit from trade to the wider UK area in the east. The reopening of the passenger rail line to Ebbw Vale will, over time, become a growing influence especially as the south Wales regional rail system develops further. Developments such as the Life Long Learning Campuses in Ebbw Vale and in Merthyr Tydfil and the redevelopment of the Ebbw Vale steelworks site will impact beneficially on the Heads of the Valleys area. It can be anticipated that the stronger settlements in that area will be the focus of scarce resources in the future to make them stronger and more rounded. This is part of the Spatial Plan Agenda and has prompted developments such as the VITCC (Valleys Technology Training and Communications Centre) at Tredegar.

Sources of Future Demand in the Market

The office sector is anticipated to continue to grow and there is the potential for Government relocations from the south east of England. The market driver for this however will continue to focus on the M4 corridor, although some of this can be anticipated to extend into the mid Valleys area. Because of the demographics and requirements of such relocations it cannot be anticipated to extend in any scale into the Heads of the Valley area. There is however, likely to be on-going demand for small-scale offices in these locations.

Warehousing, in the sense of large-scale distribution facilities as opposed to industrial units that have been adapted for storage, are currently located mainly in the Chepstow area. One of the main reasons for a lack of units elsewhere is the strict planning consent required and the level of accessibility. Planners are reluctant to give consent for very large buildings that employ only a few people. Hence there tends to be a trade-off between good communications and employment potential. However, the economy requires a good network of warehousing to fulfil consumer demand and the constant development of supply-based industry therefore has compelling market forces behind it and the need for warehousing is unlikely to diminish.

Industrial development can be anticipated to be a steady market in the upper Valley areas because of the demographics, skills and socio-economic base. Whether large scale plants will ever feature in this area in the future in view of wider international competition is doubtful but smaller to medium scale businesses will provide a more robust and mobile workforce and tend to be UK or Welsh owned. There is currently a need for industrial/warehouse units of up to 500 sq m (5k sq ft) suitable for small and start-up businesses. Continuing WAG policy within the Spatial Plan and other policy structures should ensure continued investment in the environment and settlements in this area to improve the quality of life, the education base and work prospects of the population as has increasingly happened in the mid-valley areas. This will add to the employability of people in a period of relatively low employment. Finally, grant aid via the new EU Convergence Funds will improve prospects for the next five or six years.

7.4. Conclusions

Large-scale UK and international inward investment employment opportunities have diminished as multi-national companies go global. Demand for large-scale sites is anticipated to be lower in coming years than it has been in the past.

The market for small to medium-sized units is active and has good occupancy levels. Scarcity of units in the coastal and lower valleys areas has shifted the focus to the upper valleys.

Current demand suggests that additional small workshops of 139-500 sq m (1,500-5k sq ft) are needed but planned developments at Rassau and Cwmcrachen[14] may satisfy this in the immediate future and longer term.

A limited development of small campus-style offices at Victoria or Tredegar Business Park may be viable with grant support.

[14] Based on information received from the Council's planning department in early 2007 and subsequent conversations: Cwm Crachen – Planning application no 2006/0475 (Two blocks of small industrial units totaling 648 sq m); Rassau – Planning application no 2005/0610 (Proposed business park for B1/B2/B8), although it is understood that this application may have subsequently been withdrawn.

Nationally there is a demand for increased recycling facilities and it may be that Blaenau Gwent sites can fulfil this function to some extent. The suitability of sites for purely recycling uses has not been explored as part of this study however.

The forthcoming train line is likely to have a positive effect upon the industrial land market in Blaenau Gwent by making the area more accessible to people living outside the County Borough. On the same token it will make it easier for Blaenau Gwent residents to travel to other areas to work. Either way the train line is likely to have a positive and regenerative impact on Blaenau Gwent.

We understand from the Council that the WAG has introduced a job relocation policy which has already influenced Merthyr and may benefit Blaenau Gwent in the future.

The remainder of this report looks at strategies for improving employment opportunities and includes a reassessment of existing sites in light of this appraisal.

8. EMPLOYMENT LAND FORECAST

8.1. Introduction

In this section we forecast future demand of employment land by type and size. As outlined in the ODPM's 'Employment Land Reviews: Guidance Note' there are various forecasting approaches that can be used. However each approach has its weaknesses as well as strengths.

Regional econometric forecasting allows account to be taken of wider drivers of change and growth. However these models do not usually take account of the specific circumstances of local economic development, including the availability and nature of sites, and the range of local economic development initiatives and company plans. In contrast looking at historic trends on floorspace provides a solid record of past performance, which is particularly useful when data allows analysis of a full business cycle. However projecting such data forward in to the future does not always take account of potential changes from past trends arising from wider regional economic drivers and any changes to local property market characteristics and policies. Hence, to take into account both the local context and wider regional macro-economic context we have used the synthesis approach.

We build up the analysis by considering the following information:

- Floorspace forecasts
- Employment forecasts
- Synthesis forecasts

8.2. Floorspace forecast

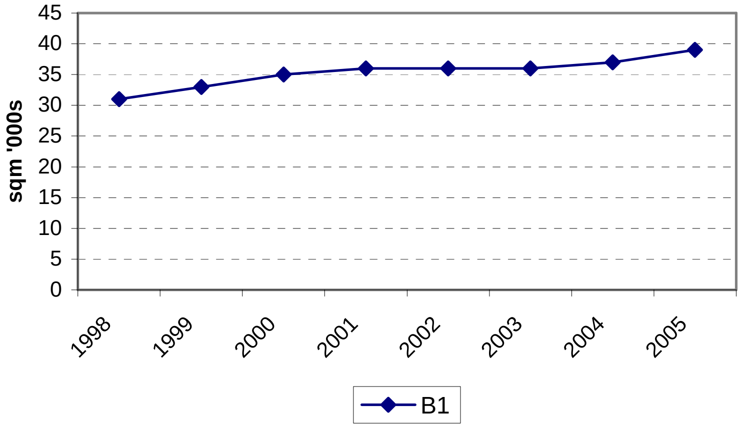
VOA Data

We reviewed data from the Valuation Office Agency (VOA), which measures all occupied and unoccupied floorspace. The statistics show that between the period of 1998 and 2005 there was a decline in the total floorspace in Blaenau Gwent at an average compound rate of 3.95% annually. This includes:

- Office (B1) space that increased at a rate of 941 sqm per annum;
- Industrial (B2) space decreased at a rate of 5,700 sqm per annum and
- Warehouse (B8) space increased at a rate of 60 sqm per annum.

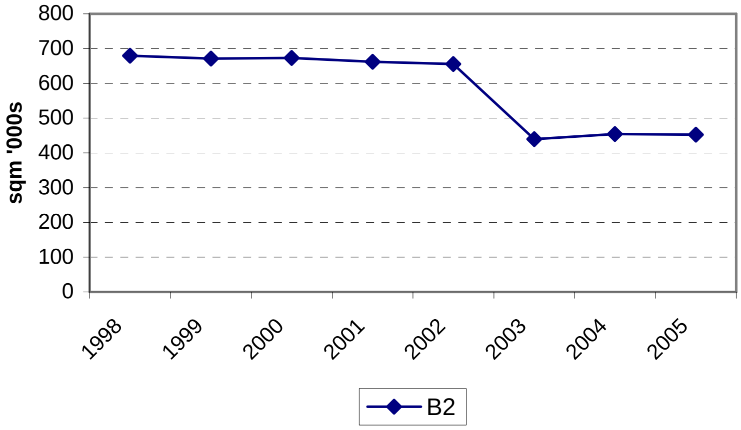
Figure 8.1, **Figure 8.2** and **Figure 8.3** show the trends in change of the stock of B1, B2, B8 floorspace in Blaenau Gwent from 1998 to 2005. Industrial and warehouse floorspace has changed more inconsistently between 1998 and 2005, in comparison to office floorspace, which has shown a consistent increase within the same period.

Figure 8.1 Blaenau Gwent B1 Floorspace trend from 1998-2005



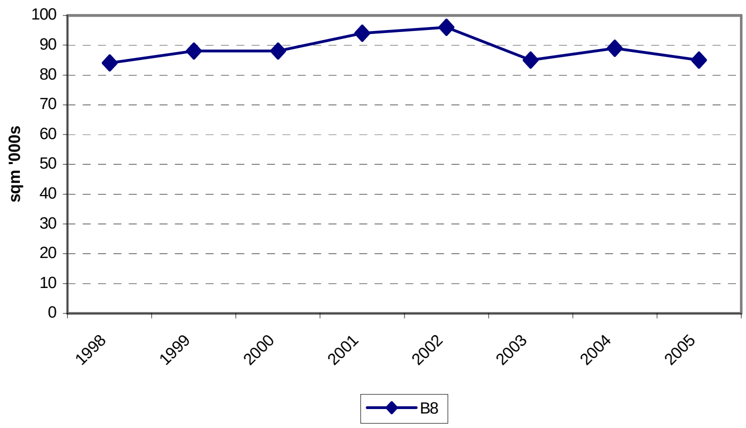
Source: VOA

Figure 8.2 Blaenau B2 Gwent Floorspace trend from 1998-2005



Source: VOA

Figure 8.3 Blaenau Gwent B8 Floorspace trend from 1998-2005

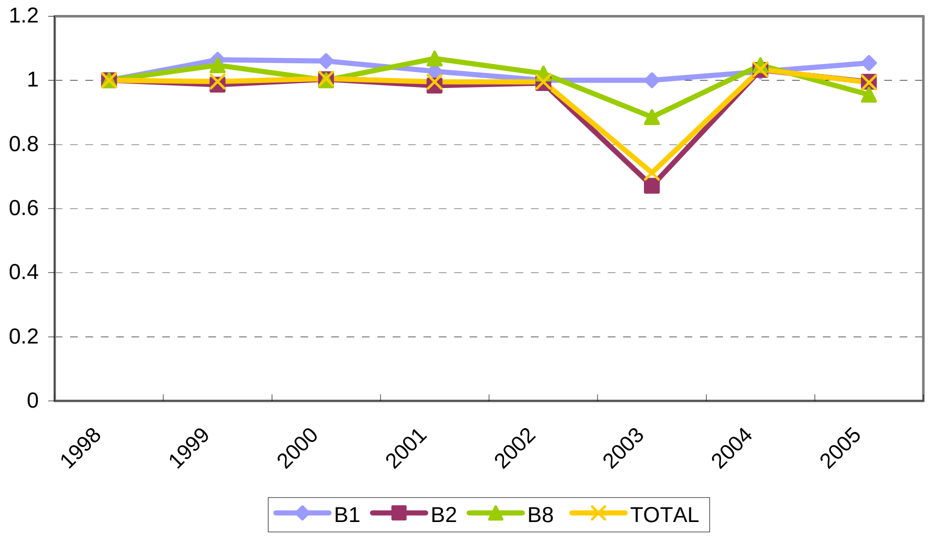


Source: VOA

The **Figure 8.4** shows the annual rate of change in floorspace by use from 1998 to 2005. The overall trend in floorspace change from year to year is characteristic of

Blaenau Gwent's commercial property market catering predominantly to the manufacturing sector. The warehouse (B8) floorspace trend over the period appears to be most volatile. Office (B1) and industrial (B2) have been more or less consistent until 2003 when there was a drastic decrease in B2 floorspace[15], but since 2003 the rate of change in floorspace of B1 and B2 uses has been mostly positive, with the exception of B8.

Figure 8.4 Blaenau Gwent Gross Floorspace rate of change between 1998 and 2005



Source: VOA

Linear Forecast

A linear forecast of employment floorspace from 2006 to 2021 based on trends in floorspace data, results in an additional demand of 15,048 sq m and 952 sq m for office and warehouse floorspace, respectively and a reduction in industrial demand of –91,200 sq m. Overall there would be a decrease in demand by –75,200 sq m as shown in Table 8.1.

Table 8.1 Linear Forecast Based on Floorspace change in Blaenau Gwent

	Floorspace Stock[16] *1998*	*2005*	*Average annual floorspace change*	*Total Changes in Floorspace Demand 2006-2021*		*Total Stock of Floorspace Demanded 2021*
	Sq m	*Sq m*	*Sqm*	*Sq m*	*(%)*	*Sq m*
Office	32,084	38,667	941	15,048	39%	53,715
Factories	492,300	452,400	-5,700	-91,200	-20%	361,200
Warehouses	88,417	88,833	60	952	1%	89,785
Total	**612,800**	**579,900**	**-4,700**	**-75,200**	**-13%**	**504,700**

Source: VOA/URS calculations

[4]Number of years multiplied by average annual change (e.g. 15 years x 940.5 sq m / year = 14.107.5 sq m)

8.3. Employment Forecasts

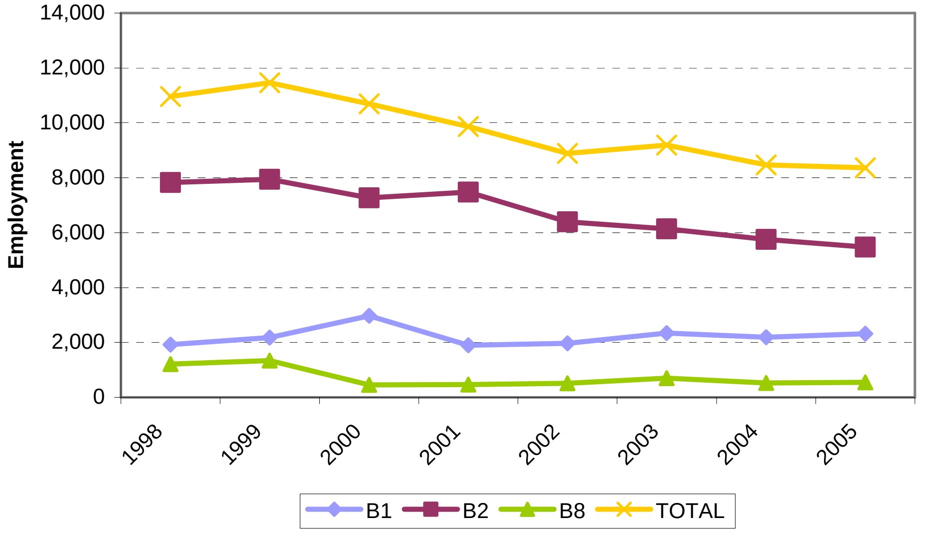
Cardiff Council published economic forecasts undertaken by Cambridge Econometrics for Cardiff and the rest of the South East Wales sub-region. The study however, does not provide a breakdown of the forecasts by the various county boroughs in the sub-region. Therefore, we reviewed historic data from the Annual Business Inquiry (ABI) for employment in Blaenau Gwent to get an idea of the trends in employment change within the county borough. Using these figures in the forecasting exercise would discount the wider sub-regional economic context for which it would be more appropriate to use the sub-regional figures.

ABI Data

The statistics show that overall employment in Blaenau Gwent has decreased between 1998 and 2005. **Figure 8.5** depicts industrial (B2) employment as decreasing the most since 1998 as opposed to office (B1) employment figures, which shows a slight increase within the same period.

[16] Floorspace stock in 1998 and 2005 are projections based on actual historic floorspace figures that discounts any anomalies between 1998 and 2005, such as the large scale loss of floorspace through the closure of the Corus steel works site. The second column in Table 8.1 shows that even with Corus floorspace figures removed, there is a net decline in stock of floor space between 1998 and 2005.

Figure 8.5 Blaenau Gwent Employment rate of change between 1998 and 2005



Source: ABI/URS

The average annual compound rates of change of employment by different uses show that:

- Office (B1) employment increased by 2.43%
- Industrial (B2) employment decreased by 4.37%
- Warehouse (B8) employment decreased by 9.33%[17]

Employment forecasts by Sub-region

Cambridge Econometrics has prepared forecasts for Cardiff and South East Wales sub-region[18] broken down by sectors for the time period up to 2016. The employment sectors used by Cambridge Econometrics were according to the broad Standard Industrial Classification (SIC) codes. However, in order to keep the data comparable to floorspace statistics, we categorised the employment figures by B1, B2 and B8 use *(See Appendix 5).* **Table 8.2** provides the forecasts in absolute figures by B1, B2 and B8 uses from 1981 to 2016.

[17] This large average annual compound rate of change is essentially because of the large decrease in warehouse employment figures between 1999 and 2000. This decrease we found can be attributed mainly to a considerable loss in employment within the wholesale of other intermediate products and alcoholic & other beverages Standard Industrial Classification (SIC) codes.

[18] South East Wales sub-region includes the County Boroughs of Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cyon Taff, Torfaen and Vale of Glamorgan.

Table 8.2 Employment Forecast by Use for South East Wales ('000s)

Use	1981	1995	2001	2005	2006	2007	2011	2016
B1	86.4	128.1	134.5	149.9	150.8	153.3	161.0	170.3
B2	148.0	138.2	130.4	116.6	113.7	112.3	107.1	102.1
B8	26.4	26.9	25.7	25.5	25.7	25.9	27.0	28.2
TOTAL	**206.7**	**293.1**	**290.6**	**291.9**	**290.2**	**291.5**	**295.2**	**300.7**

Source: Cardiff Council/URS

Linear Forecast

The South East Wales figures provided above are inclusive of Cardiff, but the apportionment towards the other county boroughs is unknown. Historically employment growth has been the strongest in Cardiff than in any of the other county boroughs. For the purpose of forecasting employment growth forward at the sub-regional level we have retained Cardiff figures within the South East Wales figures as an aspiration for Blaenau Gwent to take some of Cardiff's demand.

The employment was forecasted by Cambridge Econometrics until 2016 and this was taken further forward to 2021 based on a linear extension, as seen in **Table 8.3**.

Table 8.3 Linear Forecast Based on Employment change in South East Wales

	Total Changes in Employment 2006-2021		*Total Employment in 2021*
	'000s	*(%)*	*'000s*
Office	28.484	19%	179,851
Factories	-18,770	-16%	95,348
Warehouses	3,800	15%	29,524
Total	**13,514**	**5%**	**304,723**

Source: Cardiff Council/URS

Based on the above figures overall employment is forecasted to increase by an average compound rate of 0.3% per annum between 2005 and 2021. Employment in the industrial (B2) sector is forecasted to decrease by 1.1% annually, whereas employment in office and warehouse uses will increase by 1.1% and 0.9% per annum, respectively.

8.4. Synthesis Forecast

Our synthesis forecast approach takes floorspace trends as a base for forecasting future employment floorspace demand. The floorspace figures are adjusted for wider sub-regional economic changes by incorporating an adjustment term into the forecast.

The adjustment term takes into account the relative changes in employment during the time period for which historic floorspace figures are used as a base for the forecast and sets them in relation to forecasted changes in employment. **Table 8.4** shows the historic trend based on floorspace, past and forecasted annual employment changes for B1, B2 and B8 uses, the adjustment term and the adjusted average annual floorspace demand for 2005 to 2021.

Table 8.4 Employment Floorspace Demand Forecast Adjusted for Employment Changes (in %)

	Historic Change in Floorspace 1998-2005[19]	Average Annual Change in Employment[1]		Adjustment Term[2]	Adjusted Average Annual Floorspace Demand
	(%)	1995-2005 (%)	2005-2021 (%)	(%)	
Office (B1)	2.4	1.6	1.1	-0.7	1.7
Factories (B2)	-1.1	-1.7	-1.1	0.4	-0.7
Warehouses (B8)	0.1	-0.5	0.9	0.4	0.5

Source: URS calculations

[1] South East Wales (sub-regional) employment forecasts.

[2] Adjustment Term is calculated by multiplying the percentage change between the forecasted and historic change in employment between 1995 and 2021 by the Historic Annual Floorspace Change between 1998 and 2021. For example the adjustment term for B1 is [((1.1-1.6)/1.6) x (2.4)] = -0.9.

Table 8.5 shows the forecasted employment floorspace demand for Blaenau Gwent. The forecast shows an additional demand in office and warehouse floorspace of 10,256 and 7,659 sq m respectively and a decrease in demand of industrial floorspace by 52,609 sq m.

Table 8.5 Employment Floorspace Demand Forecast Adjusted for Employment Changes (in sqm)

	Annual Forecasted Floorspace Demand 2005-2021	Total Changes in Floorspace (Net Demand) 2005-2021	Total Stock of Floorspace Demanded in 2021
	sqm	sqm	sqm
Office	641	10,256	48,923
Factories	-3,288	-52,609	399,791
Warehouses	479	7,659	96,492

Source: URS

Vacancy Rates

On reviewing the vacancy rates in Blaenau Gwent for 2005, we found that within the industrial (B2) and warehouse (B8) uses 9% (49,385 sqm) of the premises were vacant, which is marginally above the 8% accepted industrial vacancy needed to allow the market to operate efficiently. The optimal amount of office 'frictional vacancy' is 5%, however, in Blaenau Gwent we found that there was a 12% (4,682 sqm) vacancy rate of office (B1) premises.

The field survey also revealed that the vacant office premises appear to be newly built and of good quality. Hence, the vacant premises above the 5% that will be required in 2021 are most likely to be taken up before any additional demand is created.

[19] The historic change in floorspace is the annual average compound rate of change between 1998 and 2005 based on the 1998 and 2005 floorspace stock figures used in **Table 8.1**.

Taking this in to consideration; **Table 8.7** shows the total stock of employment floorspace demanded in 2021 adjusted by vacancy.

Table 8.7 shows the forecasted employment floorspace demand for Blaenau Gwent

	Synthesis Forecasted Total Stock of Floorspace Demanded in 2021
	sqm
Office (B1)	46,688
Factories (B2)	399,791
Warehouses (B8)	96,492

Source: URS calculations

8.5. Employment Land Forecast

Table 8.7 presents future demand in terms of floorspace. These need to be converted into actual land area to show the additional need for employment land and the amount of land that can be released to other uses. This can be achieved by using plot ratios (i.e. floorspace per site area).

The plot ratios found in the DCLG's Guidance Notes on Employment Land Reviews, come from research studies conducted by Roger Tym and Partners and others are considered appropriate to use for the conversion of floorspace demand to employment land demand[20].

Table 8.8 shows the forecasted changes in employment land demand between 2005 and 2021 for land in office, factory and warehouse use. It should be reiterated that the synthesis model takes account of the historically higher rates of employment growth in Cardiff as an aspiration for Blaenau Gwent to achieve the higher rates of growth than have been achieved in other areas of SE Wales.

Table 8.8 Forecasted Changes in Employment Land Demand 2005 – 2021

	Total Stock of Floorspace in 2005 (m^2)	Total Stock of Floorspace Demanded in 2021 (m^2)	Net Demand in Floorspace by 2021 (m^2)	Net Demand in employment land by 2021	
				m^2	Hectares
Office (B1)	38,667	46,688	10,256	31,558	3.2
Factories (B2)	452,400	399,791	-52,609	-131,523	-13.2
Warehouses (B8)	88,833	96,492	7,659	15.317	1.5
Total	**579,900**	**542,970**	**-34,694**	**-84,647**	**-8.5**

Source: URS Calculations

There are a number of additional factors that may contribute to employment growth in Blaenau Gwent up to 2021 and beyond which have not been accounted for within the above

[20] In line with the DCLG's Guidance Notes as set out on page 101 of the 2004 Employment Land Review document. We have applied plot ratios for employment use. Within in this we have used the median of the range of figures given, which for B1 equates to 0.325; for B2 it is 0.4; and for B8 it is 0.5.

synthesis model and as such we have factored these into the employment forecast model (Table 8.9). The additional factors that may contribute to employment land demand are:

- The regenerative impact of the train line
- The Heads of the Valley Strategy and strategic importance placed on the A465 by the Wales Spatial Plan
- WAG anticipated relocations
- The impact of future EU convergence funding
- Proposed employment floor space at the former Corus steelworks site
- WDA's property strategy and its positive influence on the market

As such, we have increased by 50% the net demand in floor space demanded by 2021. Therefore the net demand for floor space shown in Table 8.8 can be viewed as the minimum amount of land demanded and the figures in Table 8.9 are the maximum amount of employment land demanded up to 2021.

Table 8.9 Forecasted Changes in Employment Land Demand 2005 – 2021: Based on extra 50% growth rates from Table 8.8

	Total Stock of Floorspace in 2005 (m^2)	Total Stock of Floorspace Demanded in 2021 (m^2)	Net Demand in Floorspace by 2021 (m^2)	Net Demand in employment land by 2021	
				m^2	Hectares
Office (B1)	38,667	52,045	15,385	47,337	4.7
Factories (B2)	452,400	426,095	-26,305	-65,761	-6.6
Warehouses (B8)	88,833	98,217	9,384	18,767	1.9
Total	**579,900**	**576,357**	**-1,536**	**343**	**0.03**

Source: URS

9. CONCLUSION AND RECOMMENDATIONS

9.1. Introduction

This section draws together the different strands of research in the employment sites and premises study, provides overall conclusions and forms recommendations. The gap analysis discusses the difference between the current supply of employment sites and premises and the demand for employment sites and premises projected over the planning period. Recommendations are then introduced to address these findings and enable Blaenau Gwent CBC to maximise the opportunities presented by the changing nature of the demand for employment land.

9.2. Conclusions

Table 9.1 summarises some of the main findings of the Blaenau Gwent Employment Sites and Premises Study, by setting out the forecasted employment land demand between 2006 and 2021, the current supply of employment land and the targeted amount of land for re-designation.

Table 9.1 Employment Land Demand and Supply

	Description	Quantum (Hectares)	Notes
A	Current Supply of Occupied Employment Land (Clusters) 2007	450	See table 6.1.
B	Current Supply of Vacant Land (ELAs) 2007	110.4	Equates to the total hectarage of ELAs as per Table 6.4 which is 165.74 ha, minus the sites that are not credible for de-allocation from employment uses based on their location within the centre of existing industrial areas i.e. E2 (4, 22B, 22D, 24, 25, 7, 8, 26C, 26N, 11, 12, 17, 18, 19, 20, 21, new site at Tafarnaubach, 14, 15, 30, 27C).
C	Additional Demand for Employment land to 2021	Low -10	Equates to net demand in employment land (-8.5ha) as per table 8.8, minus 1.5 hectares for warehouses to be accommodated within exiting in fill sites at Tafarnaubach and Rassau (see below recommendations).
		High -1.47	Equates to net demand in employment land (0.03 ha) as per table 8.9, minus 1.5 hectares for warehouses to be accommodated within exiting in fill sites at Tafarnaubach and Rassau,
D	Target De-designation	Low 86.4	B – C (low) - E
		High 77.9	B – C (high) – E
E	Buffer for churn	34	Equates to 12% of currently occupied supply of employment land, which is 284ha (based on 450ha within clusters, minus 166 covered by ELAs). We would normally run with a 6% land stock buffer but because many existing ELAs have ground conditions, this has been increased.

Source: URS

The following gap analysis discusses the existing supply of employment land and premises and compares it to the forecasted demand.

Gap Analysis

B1 Land Use

At the southeast Wales sub-regional level the office sector is anticipated to continue to grow and there is the potential for Government relocations from the south east of England and possibly some Government relocations to Blaenau Gwent and the upper Valleys by the WAG.

Our forecast has noted that there is some local demand up to 2021 for approximately four to five hectares of land for offices including B1 (b) and (c) type developments. This will include an on-going demand for small-scale offices in the County Borough. It may be possible to satisfy some of the modest demand as part of residential led mixed-use schemes, as offices sit harmoniously with residential developments. Addition office space (approximately 60,413 sq m) will be created at the former Corus Steel works site in Ebbw Vale.

It was noted during the field surveys that there were a number of vacant office premises at the Victoria Business Park and at the Innovation Centre suggesting a lack of current demand within the middle of the County Borough. It should be noted that part of the recorded stock of office floor space in 2005 within Blaenau Gwent would be ancillary to industry.

A recent business survey undertaken in Blaenau Gwent by WM Enterprise Consultants identified that 22.6% of businesses were looking to relocate, mostly to other parts of the Blaenau Gwent with the main reason being there was a need for larger and more modern premises. Unfortunately the breakdown has not been given in terms of business sector, business size or location.

The reopening of the passenger rail line to Ebbw Vale will, over time, will become a growing influence and this may help attract a more diverse business and service sector base to Blaenau Gwent. The flip side is that the train line will have the effect of enabling more people to commute out of the area.

B2 Land Use

Employment in manufacturing in Blaenau Gwent (a large proportion of the general industrial employment type) is in decline, reflecting wider national (although not necessarily sub-regional) trends. Our research has shown that since 1998 there has been an average annual rate of change in B2 employment sectors in Blaenau Gwent of –4.19% per year. This compares to a South East Wales sub-regional figure of 0.25% average annual growth. It must be remembered however that at the local level, closure of large sites such as the Corus plant have had the effect of skewing the figures and as such this anomaly has been removed from the trend based data that was factored into the employment forecasts.

Industrial development can be anticipated to be a steady market in the upper Valley areas because of the demographics, skills and socio-economic base. Whether large scale plants will ever feature in this area in the future in view of wider international competition is doubtful but smaller to medium scale businesses will provide a more robust and mobile workforce and tend to be UK or Welsh owned. There is currently a need for industrial/warehouse units of up to 500 sq m (5k sq ft) suitable for small and start-up businesses. Continuing WAG policy within the Spatial Plan and other policy structures should ensure continued investment in the environment and settlements in this area to improve the quality of life, the education base and work prospects of the population as has increasingly happened in the mid-valley areas. This will add to the employability of people in a period of relatively low employment. Finally, grant aid via the new EU Convergence Funds will improve prospects for the next five or six years.

Current B2 floor space demand suggests that some additional small workshops of 139-500 sq m (1,500-5k sq ft) are needed but planned developments at Rassau and Cwmcrachen may satisfy this in the immediate future.

The relative lack of demand for B2 employment sites up to 2021 will inevitably lead to de-allocation of vacant employment land allocations. Given Blaenau Gwent's healthy net supply of employment sites it will be possible for the County Borough Council to re-allocate sites for competing and higher value land uses helping stimulate regeneration and alternative job creation in other areas such as leisure and services.

B8 Land Use

Warehousing, in the sense of large-scale distribution facilities, as opposed to industrial units that have been adapted for storage, are currently located mainly in the Chepstow area. One of the main reasons for a lack of units elsewhere is the strict planning consent required and the level of accessibility. Planners are reluctant to give consent for very large buildings that employ only a few people. Hence there tends to be a trade-off between good communications and employment potential. However, the economy requires a good network of warehousing to fulfil consumer demand and the constant development of supply-based industry therefore has compelling market forces behind it and the need for warehousing is unlikely to diminish.

Our forecast has identified a modest net demand for employment sites in Blaenau Gwent up to 2021, which may be satisfied, by infill sites that are close to the Heads of the Valleys Road at the Rassau and Tafarnaubach Industrial Estates. It is possible that continued improvements to the Heads of the Valleys road will help stimulate distribution and logistics in the north of Blaenau Gwent.

We understand from the Council, who have commissioned consultation of businesses in the past year, that industries of all sectors are demanding better quality premises than the current stock is able to provide. Also, the Council informs us that many existing companies in the Borough would like to expand.

9.3. Recommendations and Investment Framework

Based on the findings presented in this report we propose a series of recommendations. The recommendations suggest the land parcels that could be de-designated from employment uses. The recommendations also identify the best locations for the modest forecast growth in B1 and B8 uses in Blaenau Gwent up to 2021.

These recommendations result in a suggested de-designation of a total of 56.19 hectares (as set out in Table 9.2) of employment land allocations as per policy number E2 of the Blaenau Gwent UDP.

Employment Land Allocations for De-designation or Re-designation to other uses

Table 9.2 sets out the recommended employment land allocations for de-designation from employment uses up to 2021. Justifications for release of individual sites are presented in Recommendations 2-5. It is the role of the Council to decide whether the below suggested sites for deallocation from employment uses should be realloacetd for alternative uses.

Table 9.2 Employment land recommended for de-designation from employment uses

Recom	ELA	location	Current Area (ha)
R2	E2 (1)	Rassau Extension (West)	33.02
R3	E2 (3)	Crown Avenue (East)	1.15
R4	E2 (6)	Bryn Serth Road	12.55
R5	E2 (7)	North of Waun-y-pound	9.47
Total Employment Land for de-designation			**56.19**

The total amount of land that is set out for de-designation from employment uses (56.19 hectares) in Table 9.2 suggests sites that largely unsuitable as employment land allocations based on our field survey and market assessment, but also taking into account of developer interest in sites, which has been brought to our attention by the Council.

The actual amount of land recommended for release in Table 9.2 is less than that suggested for de-designation from employment in Table 9.1 (77.9 – 86.4), based on our supply and demand assessment. However, it is not always possible to find an exact fit between the targeted amount of land and the de-designation and the actual amount of land that is appropriate for de-designation from employment uses.

Furthermore the surplus amount of vacant employment land allocations may be useful for the planning authority in the future as not all privately owned sites will come onto the market and some privately owned sites will not be suitable for inward investment. The Council and market agents have confirmed that there are not as strong competing land use situations in Blaenau Gwent as there are in other parts of Wales or the UK and as such there is less pressure to release vacant and surplus to requirement employment sites for alternative uses such as residential. A larger buffer of vacant employment land will also take into account the significant extent of ELAs within Blaenau Gwent that are constrained through ground conditions and other topographical issues.

R1	All land currently in B class uses as per policy E2 of the Blaenau Gwent UDP should remain in this allocation except for sites where a possible change of use is considered in the recommendations below.

Justification

Many ELAs are infill sites such as those located within Rassau and Tafarnaubach and they would not be suitable for any other uses.

For the small forecast demand in B8 uses (around 1.5 – 1.9 hectares) any one of the infill sites within Tafarnaubach or Rassau would be suitable to accommodate this growth. Both of these estates contain a number of ELAs that are vacant, flat, serviced and ready for development. Both Tafarnaubach and Rassau are benefiting from continued improvements to the Heads of the Valleys Road and this makes accessibility for HGVs much easier. E2 (4) would be the only problematic site in terms of short-term development as it is part forested.

R2	It is recommended that Rassau Extension (west) is de-designated as an ELA.

Justification

Much of the site has sloping topography resulting in constraints to development. The site also has very poor access to facilities and amenities and a poor workforce catchment. There remain outstanding utility requirements and the site is neither accessed, prepared nor serviced.

R3	It is suggested that Crown Avenue East is de-designated from employment use.

Justification

The site is currently difficult to access. It is close to brand new residential development of family housing and is unsuitable for industrial uses. Established residential neighbourhoods at Tredegar border the south west of the site.

R4	It is recommended that Bryn Serth Road is de-designated from employment uses.

Justification

This site is not attractive for employment purposes being bleak, exposed and having unsuitable topography. Market agents report that it is unlikely to be developed if Rhyd-y-Blew is still available and that there has been little interest in the site.

The site remain in private ownership and the owner is not interested in bring the site onto the market for employment purposes. Furthermore the site is not serviced by any utilities and there are currently no plans to extend utilities into the site. Our biodiversity checks showed that rare species are found both on and in the immediate vicinity of the site.

R7	It is recommended that North of Waun y Pound is de-designated from employment uses.

Justification

This site is not unattractive for employment uses as it is bleak and exposed and currently there are no utilities servicing the site. Market agents have reported that while the site is marginally more attractive than Bryn Serth Road, but that it is unlikely to be developed if Rhyd-y-Blew is still available and that there has been little interest in the site. There is potentially some ecological value with UK BAP species found on site. Furthermore, mature shrubbery was recorded on site at the time of the site visits, although this issue was not examined in any detail other than a visual inspection from the road.

Strategy up to 2021 and focus for investment framework

In order to satisfy the modest net demand for B8 uses in Blaenau Gwent up to 2021, sites close to the Heads of the Valleys Road, such as Crown Business Park (Platform G) and infill sites at the Rassau and Tafarnaubach Industrial Estates should be identified and allocated for such uses within the new development plan.

It is possible that continued improvements to the Heads of the Valleys road will help stimulate distribution and logistics in the north of Blaenau Gwent, as the area will become increasingly accessible.

Many sites within existing industrial sites are better serviced and have more of the necessary infrastructure requirements in place. Market agents have confirmed that the employment land market is stronger in the north of the County Borough and the area does not suffer from adverse ground conditions to the same extent as ELAs to the south of the Heads of the Valleys Road.

Existing occupiers in the County Borough have identified through the recent consultation exercise that they require better quality premises than many of those currently on offer. Therefore the Council's investment plans and administration of public sector funds should take this into account. Unfortunately no information was given on business sectors or locations.

The demand for B1 floor space during the forthcoming plan period (10,256 – 15,385 sq m) can be accommodated largely at the proposed Corus masterplan site where the current scheme has a capacity of over 60,000 sq m of commercial floor space. The reopening of the rail line to Ebbw Vale will increase accessibility to the site to the benefit of both existing Blaenau Gwent residents and those people living outside the County Borough wishing to in-commute. Market agents identify an ongoing demand for smaller business start up units and some research type facilities such as those located at Victoria Business Park. As noted above, some B1 floor space demand can be accommodated as part of mixed-use residential led schemes at different locations within the County Borough. It will be the role of the Council to ensure the appropriate mix of uses at forthcoming developments as well as help ensure necessary infrastructure is in place to support businesses such as Broadband and servicing.

The consultants have researched within the scope of work the extent of utilities and servicing at ELAs. As previously noted this has included water and sewerage and BT servicing[21]. The suggested sites for redevelopment for B8 purposes (E2, 4, 17, 18, 19, 20, 21, 24, 25), are close to the Heads of the Valleys Roads and mostly within existing industrial estates. The obtained site plans from utility companies have shown that none of these sites currently have the full compliment of utilities and services to enable them to be developed immediately. In many cases adjacent sites are well serviced and fully operational so it is suggested that the Council in the short term (next five years) focuses some EU convergence funding on ensuring the necessary power and utilities provision is in place to enable these sites to be developed either by the public or private sectors as soon as possible. If it is discovered upon detailed site inspection that there are any adverse ground conditions or problems with extending utilities to any of the particular sites, it will possible to consider for development the other infill sites listed. By preparing the listed sites (including provision of broadband) using EU convergence and other

[21] Information on gas and electricity provision was either unavailable or unaffordable.

public funds, the Council will be more likely to attract private sector investment and also will help support the growth of indigenous businesses who are looking to move to larger sites in better locations.

By investing in and preparing sites in the 5-year business plan period up to 2012, the Council will demonstrate the type of intervention that is needed to help address the typical problems of development within a deprived area such as Blaenau Gwent where the value of property and associated rental values are considerably lower than many other more affluent areas. Because of these issues there has been less incentive for private sector development to take place in Blaenau Gwent.

Another consideration within the County Borough is the fact that a fairly large quantum of ELAs (vacant land) exists, which is not getting taken up by the private sector for development. This could leave the Council open to criticism at a public enquiry, as market agents confirm it is potentially likely developers will submit planning applications for residential uses on employment land allocations and it will be more difficult for the Council to defend its preferred land use allocations.

Consolidating the current supply of vacant employment land and by de-allocating some of the less suitable sites, as has been suggested above, will mean there is a better balance between the supply and demand. However, with a generous buffer of land there will still be a reasonable enough supply of sites to able some form of choice for firms.

So the strategy and role of the Council will be to allocate the most suitable sites as suggested above, consolidate the supply taking account of the analysis within this report and the suggested best locations for the B1 and B8 growth sectors, prepare sites as fully as possible using public funds and taking account of businesses' needs, and encourage the private sector to build by proactively finding tenants. Alternatively, where companies are insistent they want to own their own buildings and develop their own premises, the Council can assist companies to apply for or receive grant aid. We understand from the Council that there is evidence that companies from England are relocating to Wales because higher levels of grant aid available. If this is the case, then Blaenau Gwent can market itself on the back of its strategic position and increased accessibility to the Birmingham and West Midlands market – as will be the case with the dualling of the Heads of the Valley Road.

Appendices

Appendix 1: Sustainable site and premises assessment criteria - Clusters

Business Cluster Number (URS):_____ Your Initials: ……… Date: ………

List UDP Employment Allocations & existing Ind. Estate included……………………..

The cluster is best described as a:

- ❑ Business park
- ❑ Industrial estate
- ❑ Warehouse / distribution Park
- ❑ Local shopping centre
- ❑ Recycling / environmental industrial sites
- ❑ Town centre / main shopping area
- ❑ Incubator / SME cluster
- ❑ Other ______________________________

Developable area in cluster in percent _________% Current use ______________________

This is an accumulation of identified and any unidentified vacant/derelict sites (inc. UDP allocations), in addition to any segments of developable land within developed sites

Site Area of cluster (through GIS/ desk based)……………………(Ha)

Quality of environment

- ❑ Very good
- ❑ Good
- ❑ Poor
- ❑ Very poor

Always comments on quality of environment

Access to facilities and amenities

- ❑ Very good
- ❑ Good
- ❑ Poor
- ❑ Very poor

Topography issues

- ❑ Yes
- ❑ No

If yes, comments on topography and illustrate on map

Ecological issues

- ❑ Yes
- ❑ No

If yes, comments on ecology and illustrate on map

Bad neighbourhood uses
Businesses in the business cluster cause:

- ❑ None
- ❑ Noise pollution
- ❑ Air pollution
- ❑ Smell
- ❑ HGV traffic
- ❑ Significant car traffic
- ❑ Other (please comment)

Always comments on bad neighbourhood uses (except none)

The cluster lies within close proximity to / has impact on *(multiple answers possible)*

- ❑ Residential uses
- ❑ Town centre
- ❑ Local shopping centre ❑
  Other…………………………………………………..

Business Cluster Number:________________(Continued)

Servicing of businesses in cluster
(multiple answers possible)

- ❑ Road side loading/unloading
- ❑ Off road loading/unloading
- ❑ Loading bays

Always comment on servicing, **reason** for judgment on adequacy

Servicing is adequate for the uses within the cluster ❑ Yes ❑ No ❑ Don't know

Parking facilities
(multiple answers possible)

- ❑ Dedicated parking within cluster
- ❑ On street parking
- ❑ Yellow / double yellow lines
- ❑ Red route
- ❑ Controlled parking zone/paid parking

Always comment on parking facilities **give reason** for judgment on adequacy of parking provision

Parking provision is: ❑ Adequate ❑ Too little ❑ Too much ❑ Don't know

Strategic road access (trunk roads) (Observation and desk based)…………….……………….

Strategic access to public transport (Observation and desk based)……………………….…

Condition of Buildings - % of buildings within Cluster in:

Very Good _______% **/** **Good_________%** **/** **Poor_________%** **/** **Very Poor %**

Possibilities for intensification / redevelopment (in which way, what are the options / how?)

Describe:……………………………………………………………………………………………

Photographs

Image number(s) ____________ / ____________ / ____________ / ____________ / ____________
(minimum of 1 image per cluster)

General description of cluster / comments on business cluster

Always describe business cluster, and include any comments you have. **List any active marketing of sites / premises**.

Appendix 2: Sustainable site assessment criteria - Vacant sites

UDP E.L. Allocation e.g. E2(1): **Newly identified site?**

Site Developed: ❑ **Site Undeveloped:** ❑ **New Developable site:** ❑

If developed, current use:____________________________

Site Area (see UDP)………………………………(Ha)

Policy destinations? (other than E2):………………………………………

What is the developable area (in percent)______________________%
This is applicable for developed, undeveloped and newly identified vacant/derelict sites.

Strategic road access (trunk roads) (Observation and desk based)……………………………………………

……

Access to public transport:

❑ *Very Good*
❑ *Good*
❑ *Poor*
❑ *Very Poor*

Access to facilities and amenities:

❑ *Very Good*
❑ *Good*
❑ *Poor*
❑ *Very Poor*

Workforce catchment:

❑ *Very Good*
❑ *Good*
❑ *Poor*
❑ *Very Poor*

Is there any evidence of potential contamination on site?

❑ Yes
❑ No

If yes, describe potential contamination and indicate on map

Is there any potential ecological value on site?

❑ Yes
❑ No

If yes, describe potential ecological value:

Are there any topographical issues (sloping site)?

❑ Yes
❑ No

Comments on topography and illustrate on map

Physical site constraints? (i.e. access from local road, layout issues, incompatible land use, environmental/nature conservation)

Comment ………………………………………………………………………………………….

Any evidence of active marketing for site as employment land: ❑ **Yes** ❑ **No**

If yes, make note of site area / land available, estate agent, exact use.

General description of undeveloped/vacant/derelict site.

Always describe site, and include any comments you have

Photographs (minimum of 1 image per site)
Image number(s) ____________ / ____________ / ____________ / ____________ / ____________

Marketability (Cooke and Arkwright to cover)

Utility needs (any general observations on site, desk based research)

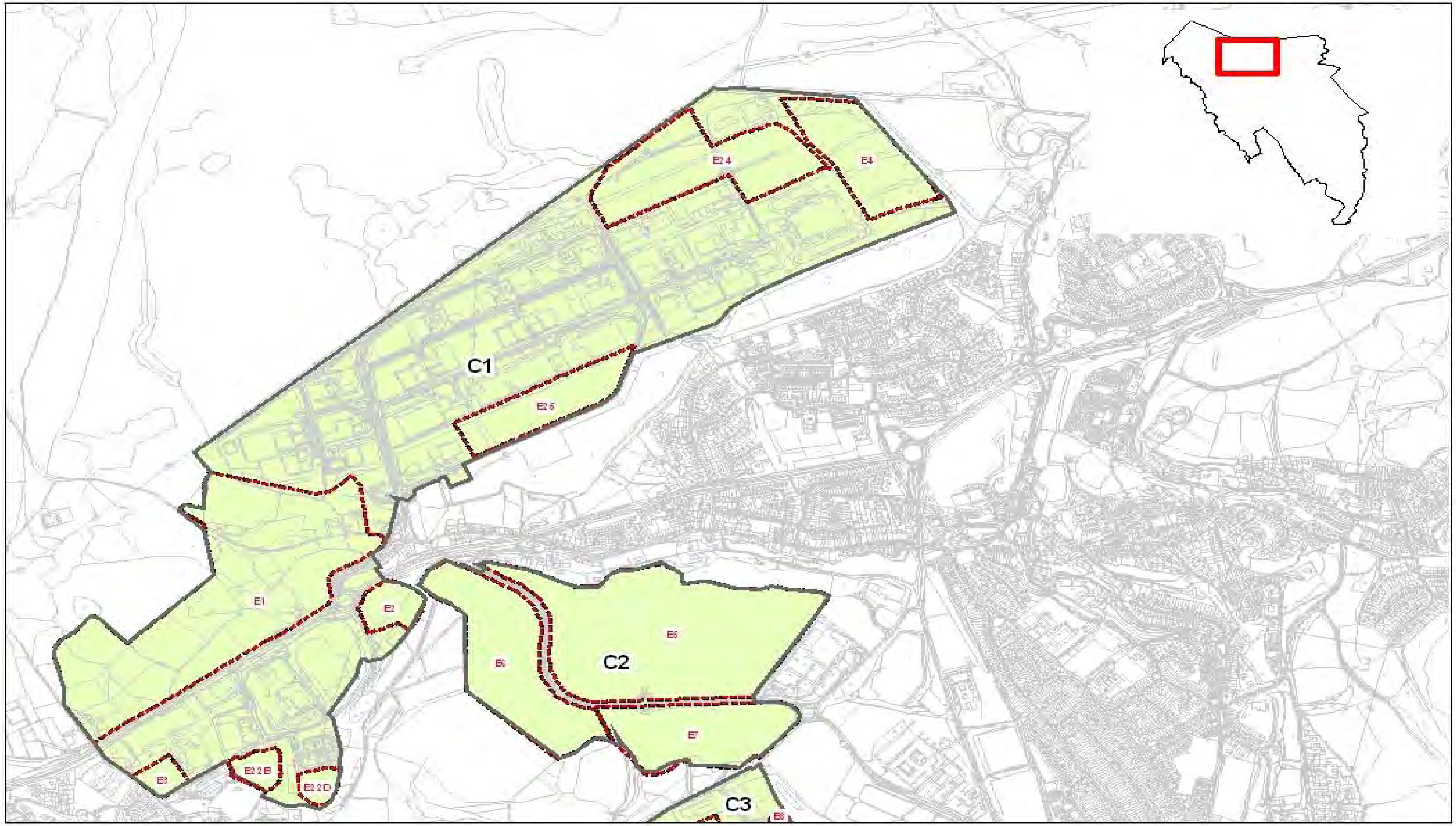
Ownership constraints (information from CBC)

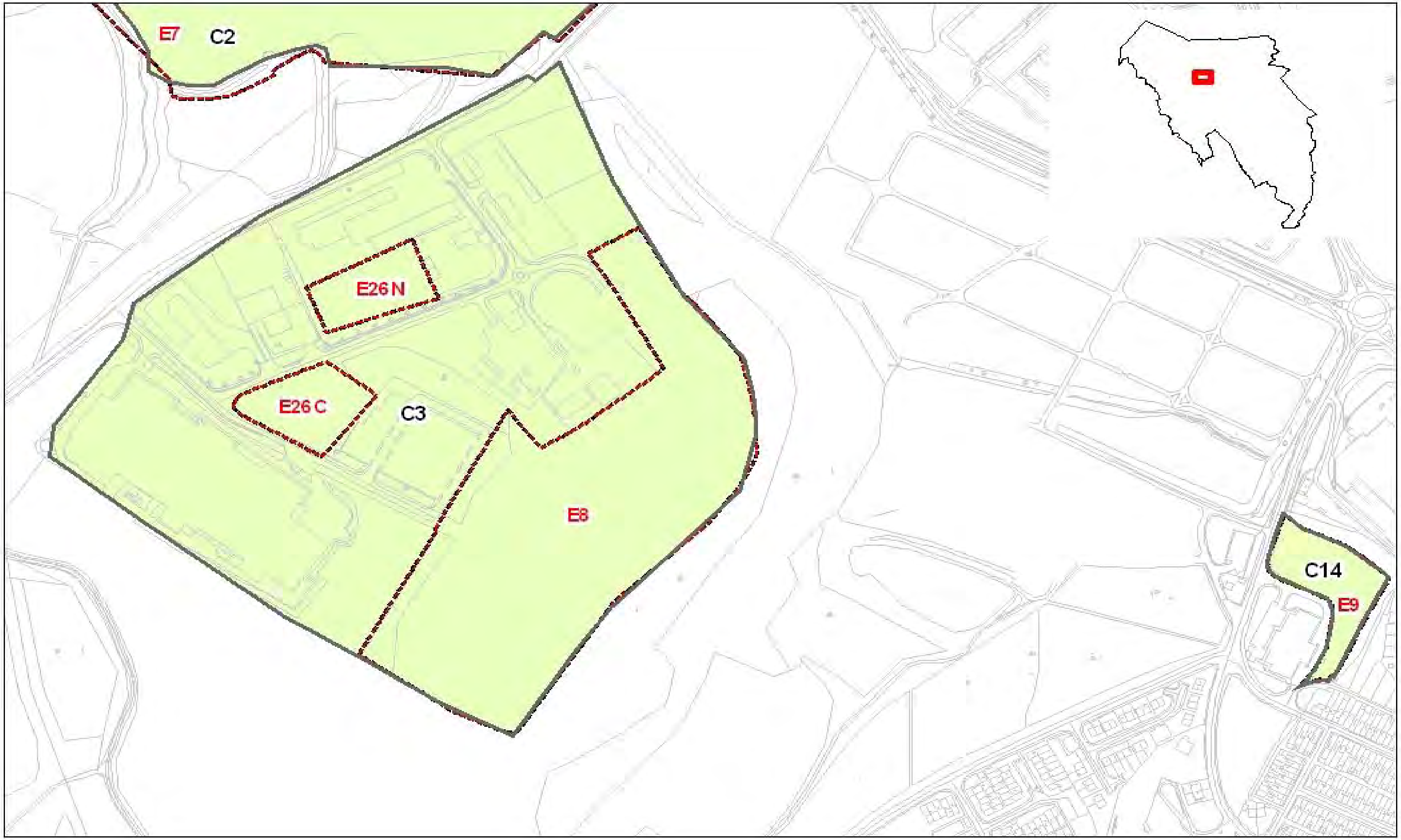
Appendix 3: Blaenau Gwent Employment Area Maps

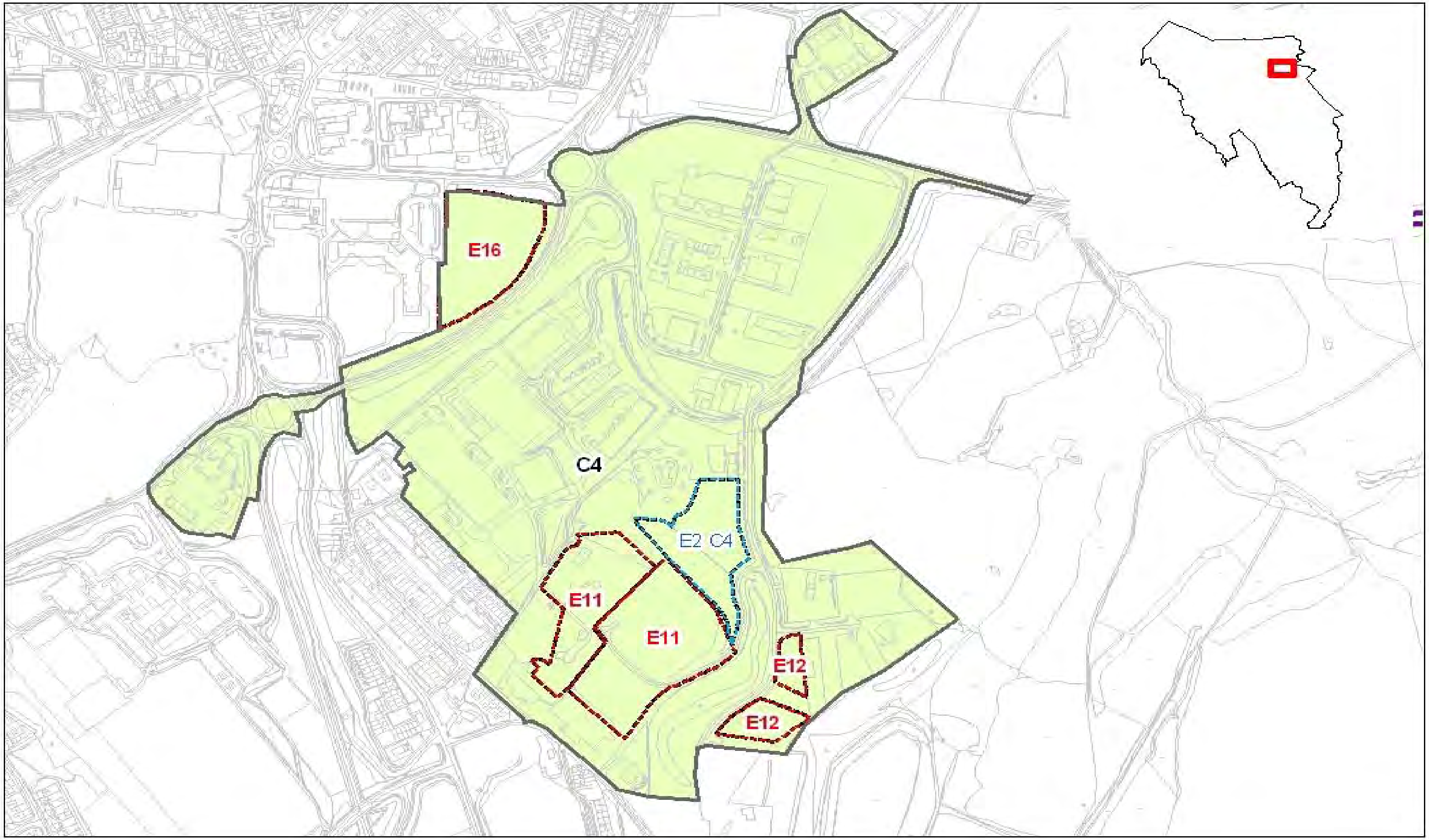
Employment Clusters

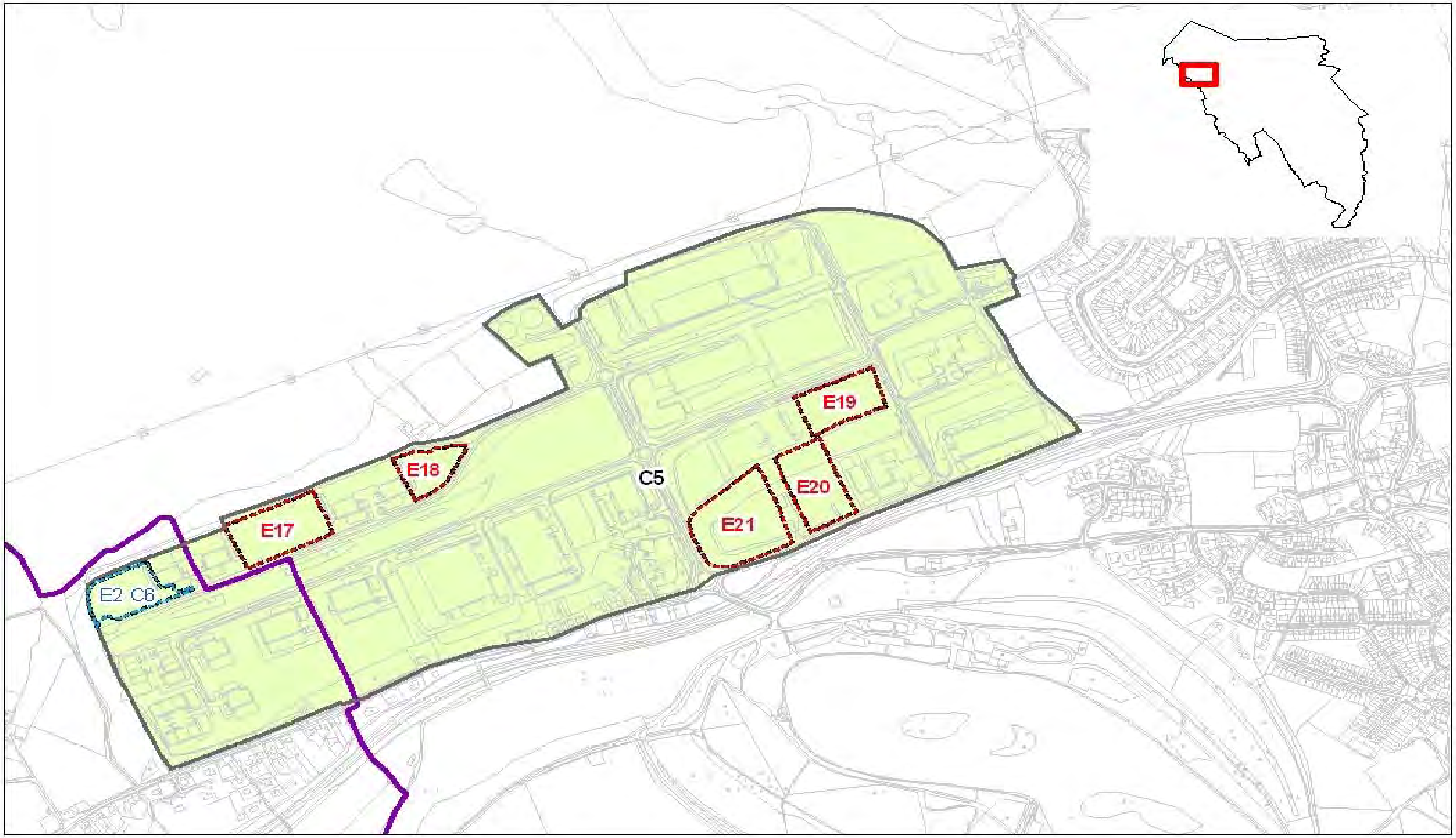
Cluster No.	Industrial Estates	Area	No. of ELAs
C1	Rassau Industrial Estate and Crown Business Park	Tredegar	10
C2	N/A (vacant land)	Ebbw Vale, Waun-y-pound	3
C3	Waun-y-pound Industrial Estate	Ebbw Vale, Waun-y-pound	2
C4	Noble Square, Blaenant Industrial Estate, Cwmcrachen, Barleyfields Industrial Estate, Blaenau Gwent Workshops	Brynmawr	3
C5	Tafarnaubach Industrial Estate	Tredegar	5
C6	Sirohowy Hill Industrial Estate and Bridge Street Industrial Estate	Tredegar, Sirohowy	1
C7	Rising Sun Industrial Estate	Blaina	3
C8	Roseheyworth Business Park	Blaina, Bourneville	3
C9	Cwmtillery Industrial Estate	Abertillery	1
C10	Cwm Small Business Centre	Cwm	1
C11	Glandwr Industrial Estate	Abertillery, Glandwr	1
C12	Victoria Business Park, Innovation Centre and Hall Industrial Estate	Ebbw Vale	2
C13	Llanhilleth Industrial Estate	Abertillery, Llanhilleth	0
C14	N/A	Brynmawr	1

Please note that individual maps provide an indication of the site area and do not give an individual scale. To get a sense of scale please see Appendix 8 map: Industrial and Commercial Areas.

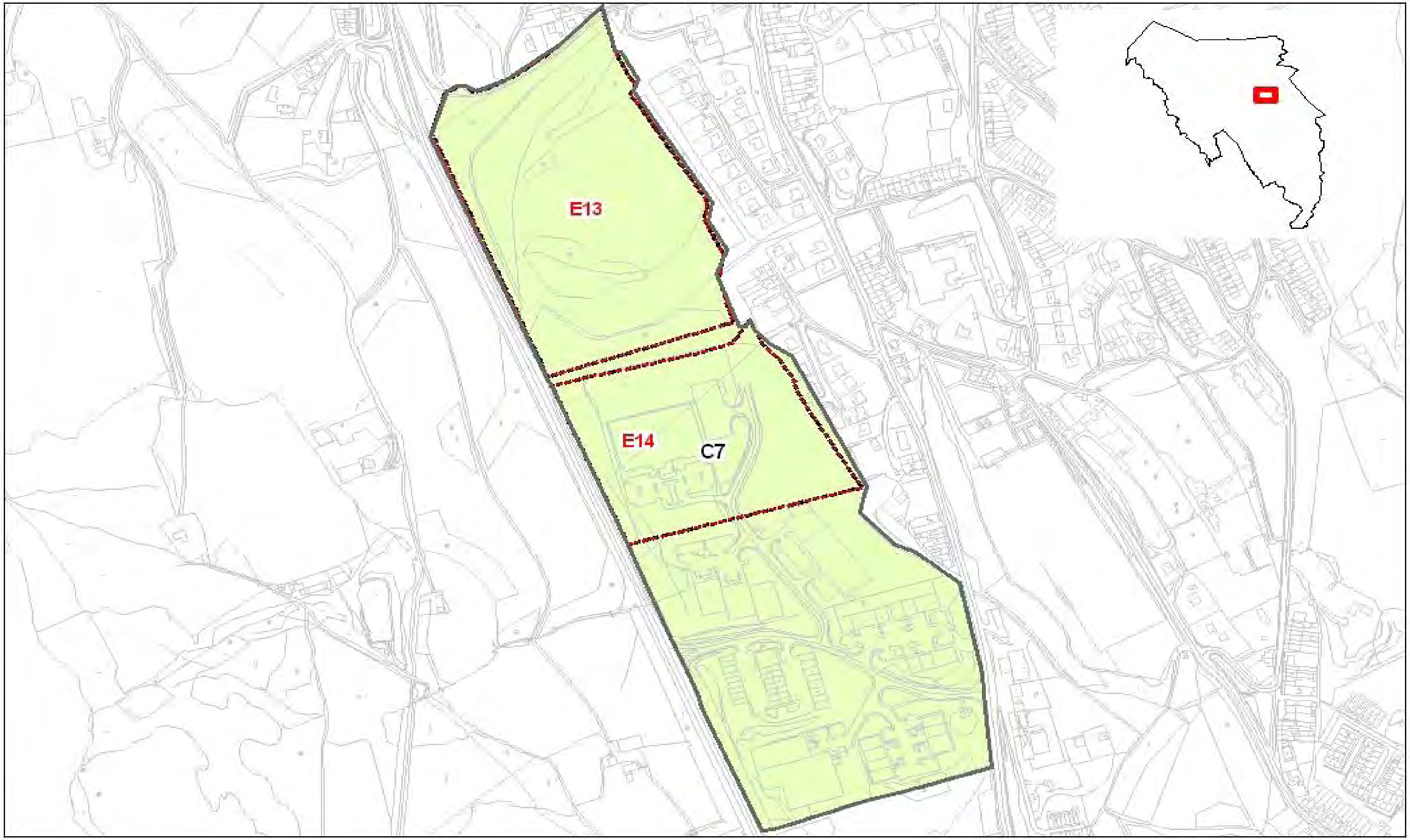

C1
C2
C3

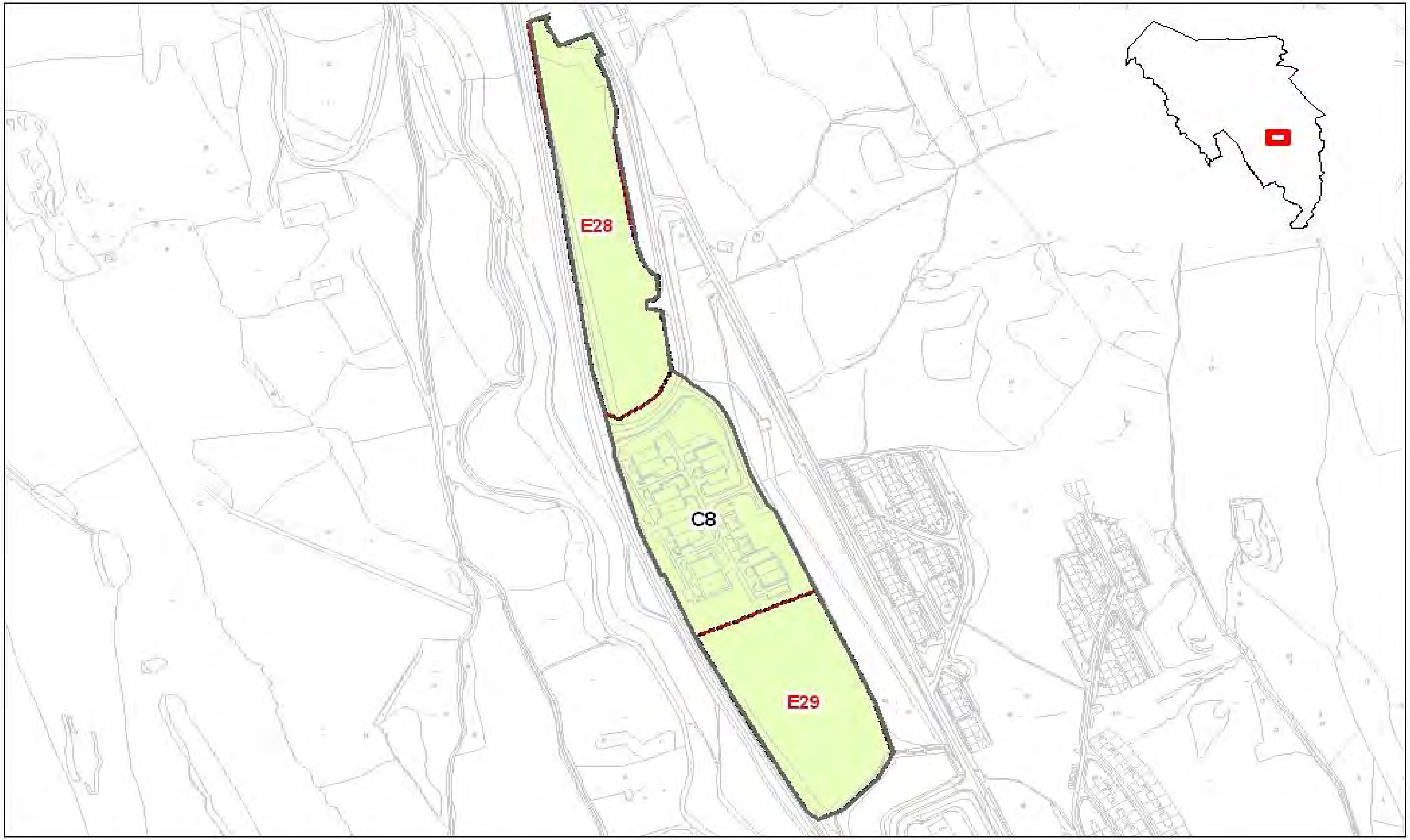

E7
C2
E26 N
E26 C
C3
E8
C14
E9


E16
C4
E2 C4
E11
E11
E12
E12

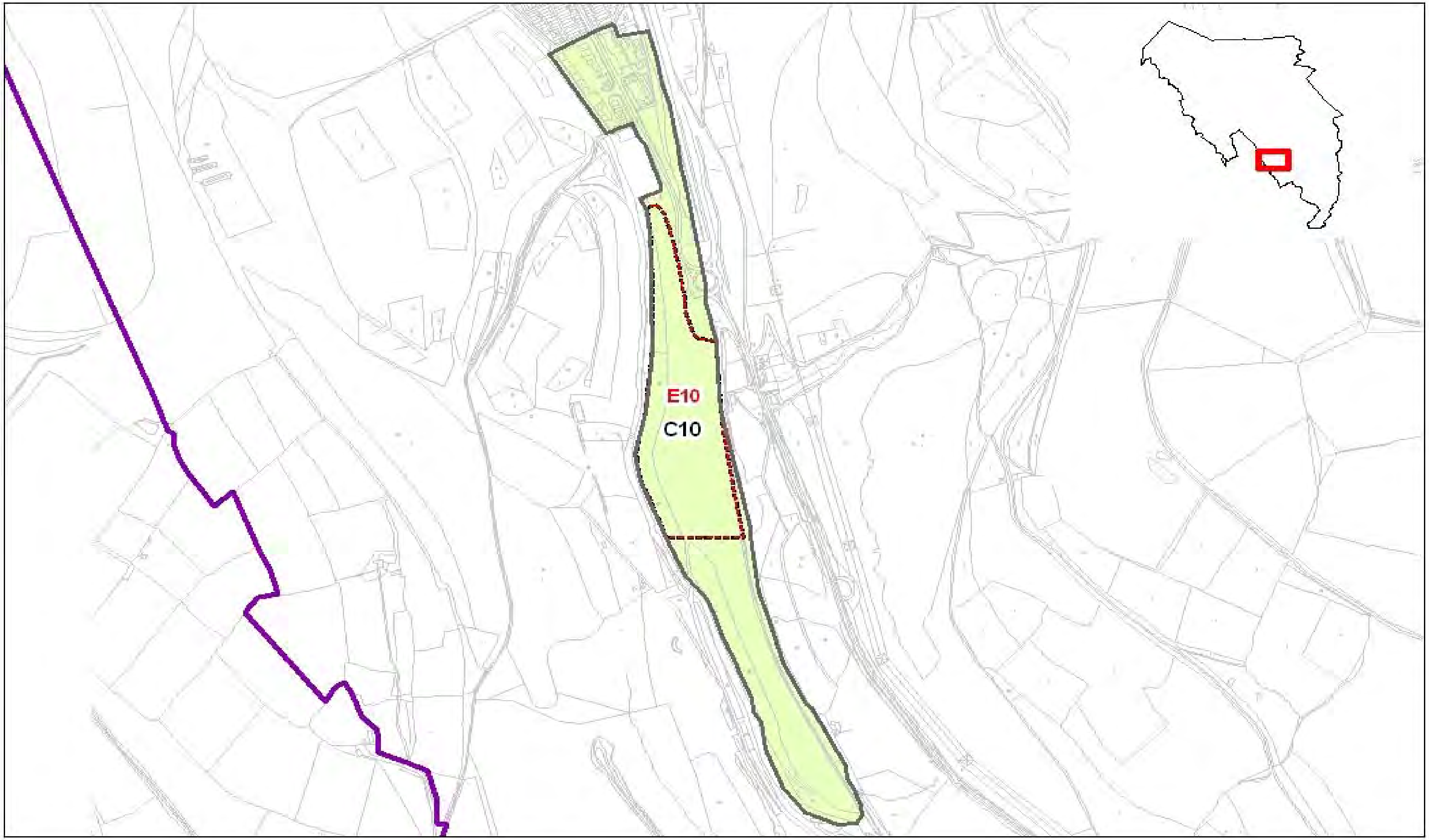

E19
E18
C5
E20
E21
E17
E2 C6

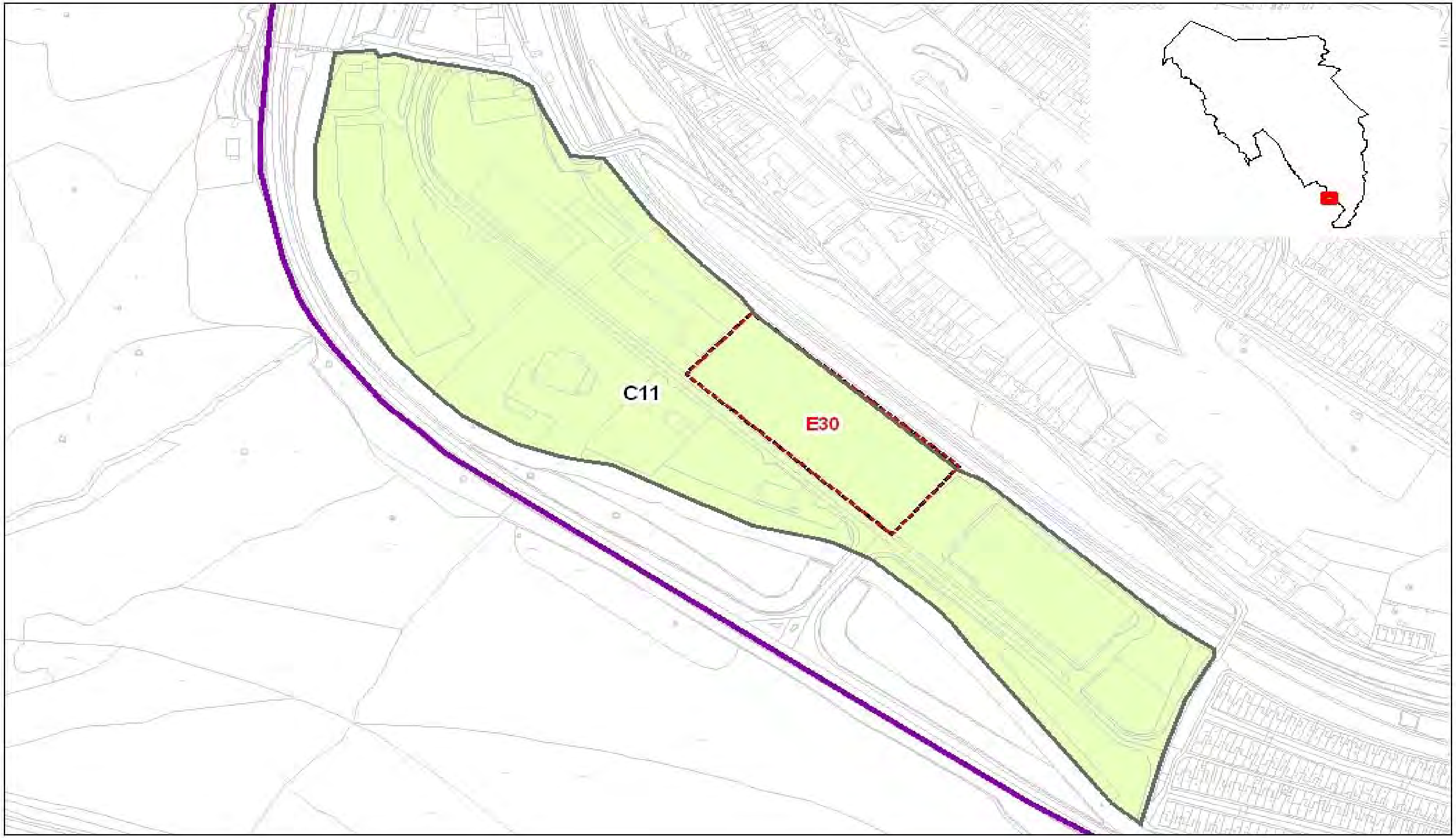

C6
E23


E13
E14
C7


E28
C8
E29


E15
C9


E10
C10


C11
E30


E31
E36
E27 C
C12


C13

Appendix 4: Employment SIC Codes under B-use Class

SIC codes under B1 (Office) use class

2211: Publishing of books
2212: Publishing of newspapers
2213: Publishing of journals and periodicals
2214: Publishing of sound recordings
6330: Activities of travel agencies and tour operators;
tourist assistance activities not elsewhere classified
6340: Activities of other transport agencies
6511: Central banking
6512: Other monetary intermediation
6521: Financial leasing
6522: Other credit granting
6523: Other financial intermediation not elsewhere classified
6601: Life insurance
6602: Pension funding
6603: Non-life insurance
6711: Administration of financial markets
6712: Security broking and fund management
6713: Activities auxiliary to financial intermediation not elsewhere classified
6720: Activities auxiliary to insurance and pension funding
7011: Development and selling of real estate
7012: Buying and selling of own real estate
7020: Letting of own property
7031: Real estate agencies
7032: Management of real estate on a fee or contract basis
7110: Renting of automobiles
7121: Renting of other land transport equipment
7122: Renting of water transport equipment
7123: Renting of air transport equipment
7131: Renting of agricultural machinery and equipment
7133: Renting of office machinery and equipment including computers
7134: Renting of other machinery and equipment not elsewhere classified
7140: Renting of personal and household goods not elsewhere classified
7210: Hardware consultancy
7221: Publishing of software
7222: Other software consultancy and supply
7230: Data processing
7240: Data base activities
7260: Other computer related activities
7411: Legal activities
7412: Accounting, book-keeping and auditing activities; tax consultancy
7413: Market research and public opinion polling
7414: Business and management consultancy activities
7415: Management activities of holding companies
7420: Architectural and engineering activities and related technical consultancy
7430: Technical testing and analysis
7440: Advertising
7450: Labour recruitment and provision of personnel

7460: Investigation and security activities
7470: Industrial cleaning
7481: Photographic activities
7485: Secretarial and translation services
7486: Call centre activities
7487: Other business activities not elsewhere classified
7511: General (overall) public service activities
7512: Regulation of the activities of agencies that provide health care, education, cultural services and other social services excluding social security
7513: Regulation of and contribution to more efficient operation of business
7514: Supporting service activities for the government as a whole
7530: Compulsory social security activities
9111: Activities of business and employers organisations
9112: Activities of professional organisations
9120: Activities of trade unions
9131: Activities of religious organisations
9132: Activities of political organisations
9133: Activities of other membership organisations not elsewhere classified

SIC codes under B2 (Manufacturing) use class

1511: Production and preserving of meat
1512: Production and preserving of poultry meat
1513: Production of meat and poultry meat products
1520: Processing and preserving of fish and fish products
1531: Processing and preserving of potatoes
1532: Manufacture of fruit and vegetable juice
1533: Processing and preserving of fruit and vegetables not elsewhere classified
1541: Manufacture of crude oils and fats
1542: Manufacture of refined oils and fats
1543: Manufacture of margarine and similar edible fats
1551: Operation of dairies and cheese making
1552: Manufacture of ice cream
1561: Manufacture of grain mill products
1562: Manufacture of starches and starch products
1571: Manufacture of prepared feeds for farm animals
1572: Manufacture of prepared pet foods
1581: Manufacture of bread; manufacture of fresh pastry goods and cakes
1582: Manufacture of risks and biscuits; manufacture of preserved pastry goods and cakes
1583: Manufacture of sugar
1584: Manufacture of cocoa, chocolate and sugar confectionery
1585: Manufacture of macaroni, noodles, couscous and similar farinaceous products
1586: Processing of tea and coffee
1587: Manufacture of condiments and seasonings
1588: Manufacture of homogenised food preparations and dietetic food
1589: Manufacture of other food products not elsewhere classified
1591: Manufacture of distilled potable alcoholic beverages
1592: Production of ethyl alcohol from fermented materials
1593: Manufacture of wines

1594: Manufacture of cider and other fruit wines
1595: Manufacture of other non-distilled fermented beverages
1596: Manufacture of beer
1597: Manufacture of malt
1598: Manufacture of mineral waters and soft drinks
1600: Manufacture of tobacco products
1711: Preparation and spinning of cotton-type fibres
1712: Preparation and spinning of woollen-type fibres
1713: Preparation and spinning of worsted-type fibres
1714: Preparation and spinning of flax-type fibres
1715: Throwing and preparation of silk including from noels and
throwing and texturing of synthetic or artificial filament yarns
1716: Manufacture of sewing threads
1717: Preparation and spinning of other textile fibres
1721: Cotton-type weaving
1722: Woollen-type weaving
1723: Worsted-type weaving
1724: Silk-type weaving
1725: Other textile weaving
1730: Finishing of textiles
1740: Manufacture of made-up textile articles, except apparel
1751: Manufacture of carpets and rugs
1752: Manufacture of cordage, rope, twine and netting
1753: Manufacture of non-woven and articles made from non-woven, except apparel
1754: Manufacture of other textiles not elsewhere classified
1760: Manufacture of knitted and crocheted fabrics
1771: Manufacture of knitted and crocheted hosiery
1772: Manufacture of knitted and crocheted pullovers, cardigans and similar articles
1810: Manufacture of leather clothes
1821: Manufacture of work wear
1822: Manufacture of other outerwear
1823: Manufacture of underwear
1824: Manufacture of other wearing apparel and accessories not elsewhere classified
1830: Dressing and dyeing of fur; manufacture of articles of fur
1910: Tanning and dressing of leather
1920: Manufacture of luggage, handbags and the like, saddler and harness
1930: Manufacture of footwear
2010: Saw milling and planning of wood, impregnation of wood
2020: Manufacture of veneer sheets; manufacture of plywood,
laminboard, particle board, fibre board and other panels and boards
2030: Manufacture of builders carpentry and joinery
2040: Manufacture of wooden containers
2051: Manufacture of other products of wood
2052: Manufacture of articles of cork, straw and plaiting materials
2111: Manufacture of pulp
2112: Manufacture of paper and paperboard
2121: Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
2122: Manufacture of household and sanitary goods and of toilet requisites
2123: Manufacture of paper stationery

2124: Manufacture of wallpaper
2125: Manufacture of other articles of paper and paperboard not elsewhere classified
2215: Other publishing
2221: Printing of newspapers
2222: Printing not elsewhere classified
2223: Bookbinding
2224: Pre-press activities
2225: Ancillary operations related to printing
2231: Reproduction of sound recording
2232: Reproduction of video recording
2233: Reproduction of computer media
2310: Manufacture of coke oven products
2320: Manufacture of refined petroleum products
2330: Processing of nuclear fuel
2411: Manufacture of industrial gases
2412: Manufacture of dyes and pigments
2413: Manufacture of other inorganic basic chemicals
2414: Manufacture of other organic chemicals
2415: Manufacture of fertilisers and nitrogen compounds
2416: Manufacture of plastics in primary forms
2417: Manufacture of synthetic rubber in primary forms
2420: Manufacture of pesticides and other agro-chemical products
2430: Manufacture of paints, varnishes and similar coatings, printing ink and mastics
2441: Manufacture of basic pharmaceuticals
2442: Manufacture of pharmaceutical preparations
2451: Manufacture of soap and detergents, cleaning and polishing preparations
2452: Manufacture of perfumes and toilet preparations
2461: Manufacture of explosives
2462: Manufacture of glues and gelatine
2463: Manufacture of essential oils
2464: Manufacture photographic chemical material
2465: Manufacture of prepared unrecorded media
2466: Manufacture of other chemical products not elsewhere classified
2470: Manufacture of man-made fibres
2511: Manufacture of rubber tyres and tubes
2512: Rethreading and rebuilding of rubber tyres
2513: Manufacture of other rubber products
2521: Manufacture of plastic plates, sheets, tubes and profiles
2522: Manufacture of plastic packing goods
2523: Manufacture of builders ware of plastic
2524: Manufacture of other plastic products
2611: Manufacture of flat glass
2612: Shaping and processing of flat glass
2613: Manufacture of hollow glass
2614: Manufacture of glass fibres
2615: Manufacture and processing of other glass including technical glassware
2621: Manufacture of ceramic household and ornamental articles
2622: Manufacture of ceramic sanitary fixtures
2623: Manufacture of ceramic insulators and insulating fittings

2624: Manufacture of other technical ceramic products
2625: Manufacture of other ceramic products
2626: Manufacture of refractory ceramic products
2630: Manufacture of ceramic tiles and flags
2640: Manufacture of bricks, tiles and construction products, in baked clay
2651: Manufacture of cement
2652: Manufacture of lime
2653: Manufacture of plaster
2661: Manufacture of concrete products for construction purposes
2662: Manufacture of plaster products for construction purposes
2663: Manufacture of ready-mixed concrete
2664: Manufacture of mortars
2665: Manufacture of fibre cement
2666: Manufacture of other articles of concrete, plaster and cement
2670: Cutting, shaping and finishing of stone
2681: Production of abrasive products
2682: Manufacture of other non-metallic mineral products not elsewhere classified
2710: Manufacture of basic iron and steel and of Ferro-alloys
2721: Manufacture of cast iron tubes
2722: Manufacture of steel tubes
2731: Cold drawing
2732: Cold rolling of narrow strip
2733: Cold forming or folding
2734: Wire drawing
2741: Precious metals production
2742: Aluminium production
2743: Lead, zinc and tin production
2744: Copper production
2745: Other non-ferrous metal production
2751: Casting of iron
2752: Casting of steel
2753: Casting of light metals
2754: Casting of other non-ferrous metals
2811: Manufacture of metal structures and parts of structures
2812: Manufacture of builders' carpentry and joinery of metal
2821: Manufacture of tanks, reservoirs and containers of metal
2822: Manufacture of central heating radiators and boilers
2830: Manufacture of steam generators, except central heating hot water boilers
2840: Forging, pressing, stamping and roll forming of metal; powder metallurgy
2851: Treatment and coating of metals
2852: General mechanical engineering
2861: Manufacture of cutlery
2862: Manufacture of tools
2863: Manufacture of locks and hinges
2871: Manufacture of steel drums and similar containers
2872: Manufacture of light metal packaging
2873: Manufacture of wire products
2874: Manufacture of fasteners, screw machine products, chains and springs
2875: Manufacture of other fabricated metal products not elsewhere classified

2911: Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
2912: Manufacture of pumps and compressors
2913: Manufacture of taps and valves
2914: Manufacture of bearings, gears, gearing and driving elements
2921: Manufacture of furnaces and furnace burners
2922: Manufacture of lifting and handling equipment
2923: Manufacture of non-domestic cooling and ventilation equipment
2924: Manufacture of other general purpose machinery not elsewhere classified
2931: Manufacture of agricultural tractors
2932: Manufacture of other agricultural and forestry machinery
2941: Manufacture of portable hand held power tools
2942: Manufacture of metalworking machine tools
2943: Manufacture of other machine tools not elsewhere classified
2951: Manufacture of machinery for metallurgy
2952: Manufacture of machinery for mining, quarrying and construction
2953: Manufacture of machinery for food, beverage and tobacco processing
2954: Manufacture of machinery for textile, apparel and leather production
2955: Manufacture of machinery for paper and paperboard production
2956: Manufacture of other special purpose machinery not elsewhere classified
2960: Manufacture of weapons and ammunition
2971: Manufacture of electric domestic appliances
2972: Manufacture of non-electric domestic appliances
3001: Manufacture of office machinery
3002: Manufacture of computers and other information processing equipment
3110: Manufacture of electric motors, generators and transformers
3120: Manufacture of electricity distribution and control apparatus
3130: Manufacture of insulated wire and cable
3140: Manufacture of accumulators, primary cells and primary batteries
3150: Manufacture of lighting equipment and electric lamps
3161: Manufacture of electrical equipment for engines and vehicles not elsewhere classified
3162: Manufacture of other electrical equipment not elsewhere classified
3210: Manufacture of electronic valves and tubes and other electronic components
3220: Manufacture of television and radio transmitters and apparatus
for line telephony and line telegraphy
3230: Manufacture of television and radio receivers,
sound or video recording or reproducing apparatus and associated goods
3310: Manufacture of medical and surgical equipment and orthopaedic appliances
3320: Manufacture of instruments and appliances for measuring,
checking, testing, navigating and other purposes, except industrial process control equipment
3330: Manufacture of industrial process control equipment
3340: Manufacture of optical instruments and photographic equipment
3350: Manufacture of watches and clocks
3410: Manufacture of motor vehicles
3420: Manufacture of bodies (coachwork) for motor vehicles:
manufacture of trailers and semi-trailers
3430: Manufacture of parts and accessories for motor vehicles and their engines
3511: Building and repairing of ships
3512: Building and repairing of pleasure and sporting boats
3520: Manufacture of railway and tramway locomotives and rolling stock

3530: Manufacture of aircraft and spacecraft
3541: Manufacture of motorcycles
3542: Manufacture of bicycles
3543: Manufacture of invalid carriages
3550: Manufacture of other transport equipment not elsewhere classified
3611: Manufacture of chairs and seats
3612: Manufacture of other office and shop furniture
3613: Manufacture of other kitchen furniture
3614: Manufacture of other furniture
3615: Manufacture of mattresses
3621: Striking of coins and medals
3622: Manufacture of jewellery and related articles not elsewhere classified
3630: Manufacture of musical instruments
3640: Manufacture of sports goods
3650: Manufacture of games and toys
3661: Manufacture of imitation jewellery
3662: Manufacture of brooms and brushes
3663: Other manufacturing not elsewhere classified
4533: Plumbing
4534: Other building installation
4541: Plastering
4542: Joinery installation
4543: Floor or wall covering
4544: Painting and glazing
4550: Renting of construction or demolition equipment with operator
5020: Maintenance and repair of motor vehicles
5040: Sale, maintenance and repair of motorcycles and related parts and accessories
7132: Renting of construction and civil engineering machinery and equipment
7250: Maintenance and repair of office, accounting and computing machinery
7482: Packaging activities

SIC codes under B8 (Warehouse) use class

5111: Agents involved in the sale of agricultural raw materials,
live animals, textile raw materials and semi-finished goods
5112: Agents involved in the sale of fuels, ores, metals and industrial chemicals
5113: Agents involved in the sale of timber and building materials
5114: Agents involved in the sale of machinery, industrial equipment, ships and aircraft
5115: Agents involved in the sale of furniture, household goods, hardware and ironmongery
5116: Agents involved in the sale of textiles, clothing, footwear and leather goods
5117: Agents involved in the sale of food, beverages and tobacco
5118: Agents specialising in the sale of particular products or
ranges of products not elsewhere classified
5119: Agents involved in the sale of a variety of goods
5121: Wholesale of grain, seeds and animal foods
5122: Wholesale of flowers and plants
5123: Wholesale of live animals
5124: Wholesale of hides, skins and leather
5125: Wholesale of unmanufactured tobacco

5131: Wholesale of fruit and vegetables
5132: Wholesale of meat and meat products
5133: Wholesale of dairy produce, eggs and edible oils and fats
5134: Wholesale of alcoholic and other beverages
5135: Wholesale of tobacco products
5136: Wholesale of sugar and chocolate and sugar confectionery
5137: Wholesale of coffee, tea, cocoa and spices
5138: Wholesale of other food including fish, crustaceans and molluscs
5139: Non-specialised wholesale of food, beverages and tobacco
5141: Wholesale of textiles
5142: Wholesale of clothing and footwear
5143: Wholesale of electrical household appliances and radio and television goods
5144: Wholesale of china and glassware, wallpaper and cleaning materials
5145: Wholesale of perfume and cosmetics
5146: Wholesale of pharmaceutical goods
5147: Wholesale of other household goods
5151: Wholesale of solid, liquid and gaseous fuels and related products
5152: Wholesale of metals and ores
5153: Wholesale of wood, construction materials and sanitary equipment
5154: Wholesale of hardware, plumbing and heating equipment and supplies
5155: Wholesale of chemical products
5156: Wholesale of other intermediate products
5157: Wholesale of waste and scrap
5181: Wholesale of machine tools
5182: Wholesale of mining, construction and civil engineering machinery
5183: Wholesale of machinery for the textile industry, and of sewing and knitting machines
5184: Wholesale of computers, computer peripheral equipment and software
5185: Wholesale of other office machinery and equipment
5186: Wholesale of other electronic parts and equipment
5187: Wholesale of other machinery for use in industry, trade and navigation
5188: Wholesale of agricultural machinery and accessories and implements, including tractors
5190: Other wholesale
6311: Cargo handling
6312: Storage and warehousing
6321: Other supporting land transport activities
6411: National post activities
6412: Courier activities other than national post activities

Appendix 5: Blaenau Gwent County Borough Employment Sites and Premises inset map

(See attached A0 size map)