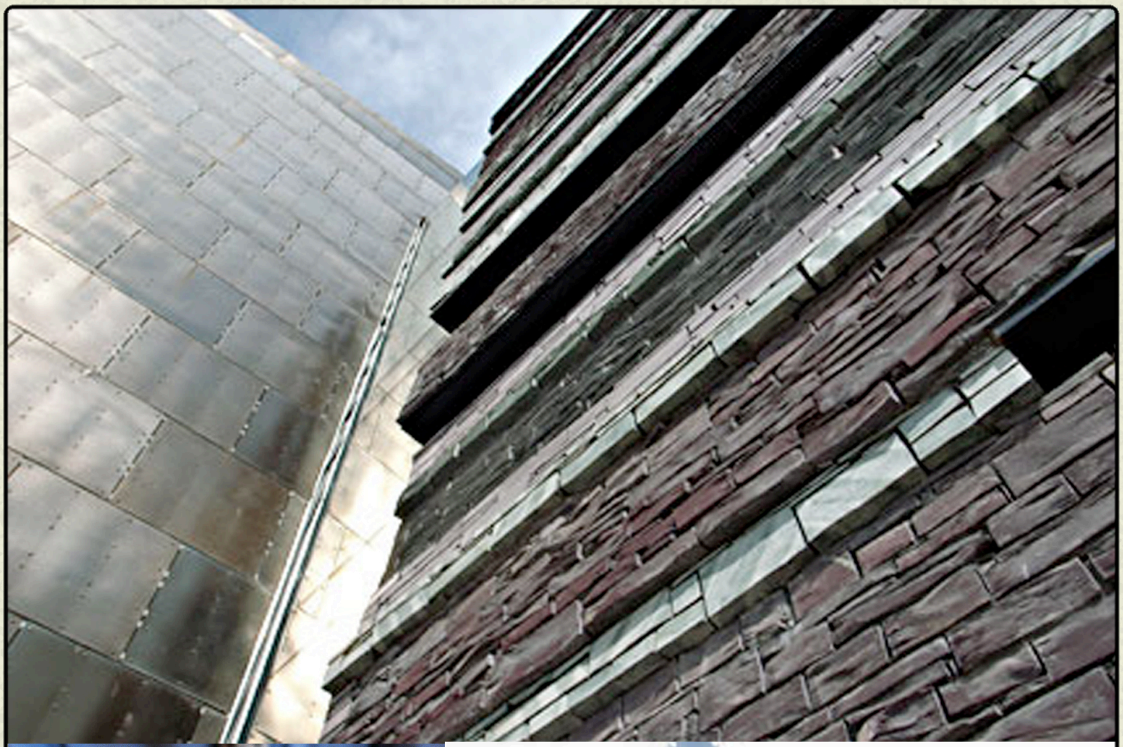
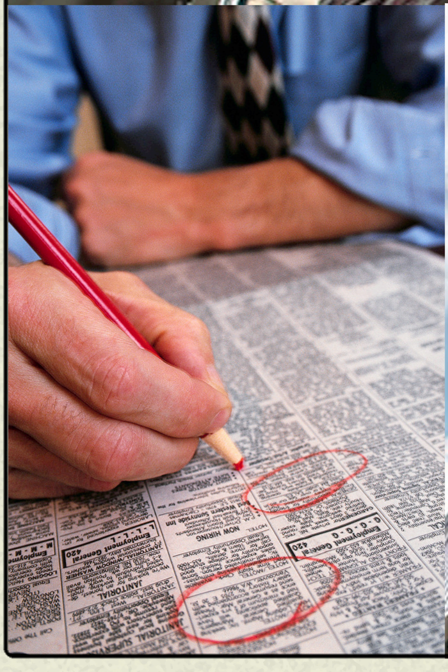
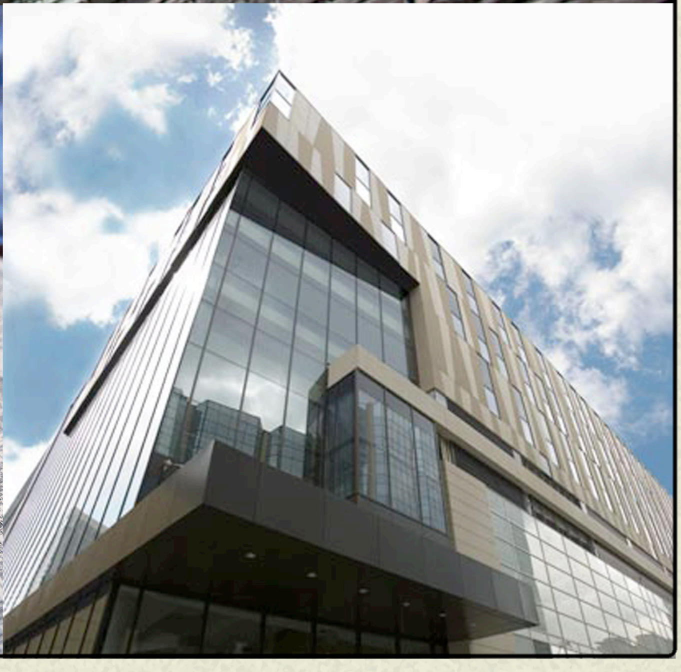
Further Analysis of Land Survey Data

Final Report

5th July 2007







HARMERS
TOWN PLANNING AND DEVELOPMENT CONSULTANTS

south east wales
ECONOMIC FORUM

FURTHER ANALYSIS OF SEWEF LAND SURVEY DATA 2000-2005

FINAL REPORT - 5 JULY 2007

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1 PROJECT BRIEF

1.1 SEWEF Employment Land Data

The South East Wales Economic Forum (SEWEF) is a partnership of the major bodies involved in economic development in South East Wales. Its purpose is to examine strategic issues, policy directions and action plans for specific areas of economic activity. It is intended that the forum will deliver a coherent regional economic policy and programme for South East Wales.

One of the roles of the Forum is the research and monitoring of the economy of South East Wales. This helps to promote coordination of activity across local authorities. Since 1999 SEWEF has assembled local authority-wide data on undeveloped employment land in order to provide a means for assessing the supply and take-up.

This data has been supplied to SEWEF by each of the ten local authorities on a biennial basis and provides an account of the bank of undeveloped employment land allocated or with planning permission for uses falling within Part B of the Town and Country Planning (Use Classes) Order 1987 (as amended). No analysis has hitherto been made on the quantum of developed land and the impact of this on job creation or on existing or planned land banks across the SEWEF region.

Although individual local authorities may have undertaken their own studies of employment land for marketing or development plan-making purposes, the wider remit of SEWEF is particularly important given the creation of the sub-regional Spatial Planning Areas. Further consideration needs to be given to the method of data collection and monitoring by SEWEF bearing in mind changing needs and circumstances.

1.2 Study Purpose

Using the SEWEF database, the study firstly seeks to identify the amount of employment development that has occurred on the available land over the period 2000-2005 in each local authority, and to provide an analysis of spatial and land use trends that may be emerging. The data has also been categorised into the three South East Wales Spatial Planning Areas – the City Coastal, the Connections Corridor, and the Heads of the Valleys Plus. It also looks at the type of development attracted to the area in terms of the Use Classes and the number of jobs created.

Secondly, as local authorities commence their preparation of the first round of Local Development Plans under the new Planning Acts, an analysis is made of the available land and any development trends against the employment land provisions of extant development plans. This will help to identify whether there may be early signs of future land shortages or surpluses arising, and so help policy makers avoid land-use policy inadvertently stifling job creation opportunities or including large allocations of land for employment which are unlikely to be developed in the lifetime of the Development Plan.

Finally, the study seeks to identify changes in employment trends across South East Wales, to identify whether there is a correlation with land supply and to review future growth scenarios and the implications this may have for land-use policy and future site availability

1.3 Methodology

The ten local authorities provide the primary source of data on employment land availability in terms of their annual surveys for SEWEF. In practice, each authority highlights changes to the previous year's survey. These may be changes in the size of the developable area of land, sites no longer available and new employment sites. Once a site has been developed (for employment or another use) it is taken off the schedule.

Harmers analysed the schedules for 2000 and for 2005. In addition, a list of sites which appeared on the schedule for 2000 but not for 2005 was prepared by SEWEF for each local authority and became known as the 'differences' tables. Each site on the 'differences' table was analysed, together with all sites registered with a developable area which was different in 2005 from that in 2000. A further check on sites developed for employment uses 2000-2005 was undertaken with considerable help from the local authorities' economic development officers and planning officers. This revealed sites which had slipped the net for various reasons. Finally more detailed information was sought from the local authorities in terms of occupiers, use class and numbers employed on all employment land developed between 2000 and 2005. This information appears in the tables in Appendix 2. For Cardiff, the data derives from the Council's Strategic Planning Annual Business and Industrial Landbank Monitoring schedules which are more reliable than the SEWEF schedules.

A comparison was made between the local authorities' 'developed land' data and the SEWEF 'available land' data to illustrate the pattern of employment land development activity that has occurred over the 6 years of the study period 2000-2005. It should be noted from the outset however that the two sets of data are not necessarily directly compatible. That is, it has not been possible to track the activity of one particular site over the course of the 6-year period to obtain an absolute picture of its development. This is because the SEWEF data simply provides a 'start year' and an 'end year' picture of the supply of land and does not record activity and, because over time sites become sub-divided or reallocated to other uses or, simply become known by different names. Moreover, there are examples of sites being developed by the local authorities that do not feature on either the year 2000 SEWEF land schedule or the year 2005 because they became available and were developed in the intervening period between 2001 and 2004.

The information derived from the SEWEF schedules relates specifically to employment development on land allocated for employment uses. It does not include employment development on non-allocated sites or windfall sites or employment development on existing sites. Similarly the study excludes consideration of the loss of erstwhile employment sites to other uses. This is a major concern in Cardiff for example, and therefore the figures for land developed for employment are an under-representation of the development that has taken place not only there, but probably in Newport and Bridgend as well, where a considerable amount of redevelopment on existing sites has taken place.

In order to understand the changes during the study period on land earmarked on the SEWEF schedules, more detailed investigations have been carried out on sites marked as 'redefined', 'sold or let' and 'not available'. In some circumstances sites had been '*redefined*' where separate plots may have been identified in an earlier survey but were subsequently amalgamated into a larger site in a later survey. In other circumstances sites had been categorised as *“sold or let”* when they had been developed for example, in Blaenau Gwent the Glandwr site in Llanhilleth was categorised as *“sold or let”* but further investigations, revealed that it is privately owned and a fully developed industrial site of approximately 4.8 hectares (see Appendix 2). A large number of these sites have been developed, if not for industrial use then often for residential or retail and in future studies this information should be recorded as it is important to the study and contributes to an understanding of overall trends.

There have been problems with data collection and analysis. Under separate cover, Harmers has offered constructive comments on improvements to the surveys in the future. It has nevertheless still been possible to analyse the supply and demand for employment land across local administrative areas, reapportion this to the new geographies of the Spatial Planning Areas and identify trends emerging from the interaction between land supply and job creation.

2 ANALYSIS OF DEVELOPED EMPLOYMENT LAND BY LOCAL AUTHORITY AREAS

2.1 Employment Land Take-up in the SEWEF Region

In order to determine the take-up of employment land, information was initially taken from the SEWEF schedules which identified the changes over the study period and this was refined through liaison with each of the local authorities.

Table 1 Supply and Development of Employment Land in SEWEF Region 2000-2005, by Local Authority

	Supply at 2000[1]		Developed Land (Ha)[2]		Supply at 2005[1]	
	Hectares available	**Number of sites.**	**B1 B2 B8 Uses**	**Sui generis & other employment generating uses (excluding housing)**	**Hectares available**	**Number of sites.**
Blaenau Gwent	90	48	22.08	0	89	29
Bridgend	270	47	32.35	1.05	219	19
Caerphilly	145	30	11.88	0	114	12
Cardiff	114	30	44.02	5.25	55	18
Merthyr	47	19	10.85	0	37	11
Monmouthshire	82	23	0.24	0	71	20
Newport	336	74	89.46	0	313	46
RCT	186	74	27.42	5.75	276	53
Torfaen	87	31	11.83	1.29	71	20
Vale of Glamorgan	122	32	3.31	14.23	144	26
SEWEF Total	**1,479**	**408**	**253.44**	**27.57**	**1,389**	**254**

[1] Source: SEWEF annual employment land availability surveys
[2] Source: Unitary Authorities' revised figures

In addition to B1, B2 & B8 use classes, which are the traditional 'employment' uses (see 2.2 for details), there are other use classes which generate employment and these account for 27.57 hectares of a total 281 hectares of land developed for employment uses between 2000 and 2005. These 'other employment-generating uses' are indicated below.

Sui Generis; a use on its own, includes a trailer store, civic amenity site, Mercedes centre and a vehicle recovery centre in Bridgend, motorway services and car showrooms in Cardiff, waste plant, car sales, van hire, car park, waste recycling and composting facilities in RCT, car park in Torfaen and car sales, scaffolding business, waste and recycling plant and car park in the Vale.

A2 covers a job centre in Porth, RCT and an Architects office in Cardiff.

A3 includes a restaurant in Torfaen.

C1 includes a hotel (4.90 ha) at Cardiff Airport in the Vale and hotel at Lower Mill, Torfaen.

D1 includes a Brethrens Assembly Room and a Media Technology Learning Centre in RCT, an Orthopaedic Centre in Cardiff.

There has also been a loss of employment land to housing (C3) and retailing (A1)- see Section 2.3.

Table 1 illustrates that whilst there has been an overall diminishing supply of employment land between 2000 and 2005 by some 90 hectares, the actual amount of employment development is 281 hectares. The highest rates of development activity as expected are found within the coastal belt and in the major conurbations along the M4 corridor at Cardiff, Newport and Bridgend. The supply situation for the region is bolstered by large new allocations made through the Newport UDP and the windfall planning permission at the former Llanilid Opencast site within RCT. These go some way to offsetting the dwindling stock of land in Cardiff and the trend especially in the Capital for available industrial land to be developed for non-industrial uses.

The Table suggests that the Valleys area local authorities of Blaenau Gwent, Caerphilly, Merthyr Tydfil, Torfaen and Rhondda Cynon Taff were responsible for 84 hectares which is 33% of the total B1, B2 & B8 development in the SEWEF Region. This figure appears to mask the true picture of the location of the development within those areas, however, and this is explored in more detail in the context of the Spatial Planning Areas in Section 3. Monmouthshire has maintained large land banks of employment land over the study period yet records the lowest rate of development of the 10 authorities surveyed with apparently only 0.24 hectare being developed for employment. In the Vale of Glamorgan, 17 hectares of employment land has been developed and this comprises only 3 hectares in Use Classes B2 and B8 and 9 hectares in sui generis which includes a 6.5 hectare car park and also a 4.9 hectare hotel (use class C1) at Cardiff International Airport.

In the SEWEF area between 2000 and 2005, 281 hectares of land has been developed for employment purposes and this represents 19% of the land available (1479 hectares) in 2000.

2.2 Type of Employment by Use Class

Table 2 shows type of employment development categorised by land use classification using the Town and Country Planning (Use Classes) Order 1987 (as amended). The definitions are:

B1 Business

a) Offices, other than a use within Class A2 (Financial Services)
b) Research and development of products or processes
c) Light industry

B2 General Industrial

General industry: use for the carrying out of an industrial process other than one falling in class B1

B8 Storage & Distribution

Use for storage or distribution centre

For the purposes of Table 2, where more than one use class operates on any one site, then the predominate use class has been recorded.

Table 2 Type of Employment Development Achieved on Employment Land in SEWEF Region 2000 – 2005, by Local Authority

	Total Hectares Developed for employment	Predominantly B1 (Ha)	Predominantly B2 (Ha)	Predominantly B8 (Ha)	Mixed Use (Ha)	Sui Generis and Other Employment Uses (Ha)	Known Jobs Created on B1 B2 & B8 developments
Blaenau Gwent	22.08	3.21	15.55	3.32	-	-	716
Bridgend	33.40	6.71	12.34	13.30	-	1.05	1762
Caerphilly	11.88	0.81	11.07	-	-	-	620
Cardiff	49.28	10.27	3.40	18.98	11.38	5.25	7750
Merthyr	10.85	5.53	-	-	5.32	-	nk
Monmouthshire	0.24	-	0.19	0.05	-	-	10
Newport	89.46	7.90	39.26	42.30	-	-	3673
RCT	33.17	16.21	3.10	6.29	1.82	5.75	1901
Torfaen	13.12	5.79	5.24	-	0.8	1.29	610
Vale	17.54	-	2.53	0.78	-	14.23	100
SEWEF TABLE	**281.02**	**56.43**	**92.68**	**85.02**	**19.32**	**27.57**	17,142

The table shows that in the six year study period, 281 hectares of land has been developed for employment purposes: 56.43 hectares (20 %) for predominantly B1 uses, 92.68 hectares (33%) for predominantly B2 uses and 85.02 hectares (30%) for B8 uses. 19.32 hectares (7%) has been developed for mixed B1/B2/B8 uses and 27.57 hectares (10%) for sui generis and other employment generating uses. In total, the 281 hectares of development has generated over 17,000 jobs. (The numbers employed are unknown on all 7 sites in Merthyr, on one site in Monmouth and one large site in Torfaen).

In Newport, 89 hectares has been developed for employment creating 3673 jobs, compared with 49 hectares in Cardiff and 7750 jobs, 33 hectares in Bridgend and 1762 jobs, and 33 hectares in RCT and 1901 jobs.

Development in Newport for B2 uses accounts for 39 of the total of 93 hectares in the SEWEF area, and for B8 uses accounts for 42 of the 85 hectares in the SEWEF area. Most B1 uses have been in RCT (16.21 hectares), Cardiff (10.3 hectares) and Bridgend (6.7 hectares).

2.3 Loss of employment land to other uses

Information on the loss of employment land to other uses was not readily available from the SEWEF database. In the case of loss of employment land to residential use, some sites were identified from further investigations into the "*developed*" (Blaenau Gwent and the Vale), "*not available*" (Caerphilly) or "*re-allocated*" (Merthyr and Monmouthshire) columns on the differences tables. Different local authorities used different categories. In other cases information was sought directly from Planning and Economic Development staff (in Cardiff and RCT) and an analysis of development control records (in Torfaen). The following figures are therefore given as an indication of a trend, and are not to be taken as a comprehensive investigation, showing the amount of employment land used for housing over the 2000 – 2005 period. With the exception of Torfaen and part of Cardiff (where there may have been a change of name), the housing development sites can be traced to employment sites identified on the SEWEF schedules for the year 2000. Thus most of the 85 hectares represents allocated employment land used for housing and taken from the supply of land for employment as at 2000.

Known Housing development on employment land 2000 – 2005 (hectares).

Blaenau Gwent	1.4
Bridgend	10.8
Caerphilly	3.0
Cardiff	36.8
Merthyr	3.4
Monmouthshire	0.2
Newport	14.5
RCT	1.6
Torfaen	13.1
Vale	0.4
TOTAL	**85.2**

In Cardiff, a significant amount of employment land has been used for residential development (36.8 hectares) and to a lesser extent this has occurred in Newport (14.5 hectares), Torfaen (13.1 hectares) and Bridgend (10.8 hectares).

Known retail development on employment land 2000 – 2005 (hectares)

Blaenau Gwent	Dunlop Semtex	2.4
Caerphilly	Crossways Park	2.75
Monmouthshire	Beaufort Park & Severnbridge	0.91
Newport	Crindau Transco	10.46
TOTAL		**16.52**

The loss of employment land to retailing does not appear to be as great with only 4 of the 10 authorities identifying a loss.

When residential and retail uses are added to employment uses, it can be seen that 382 hectares out of 1479 hectares of the land allocated for employment in 2000 in the SEWEF region has been developed. (This does not take account of other uses such as higher education or leisure for example). Of the 382 hectares, 74% has been developed for employment, 22% for housing and 4% for retail. These figures should be treated with caution because the SEWEF schedules have been designed to show employment land supply and take-up but not the details of the development that has taken place for housing and retail.

2.4 Land Take-up and job creation

Table 2 on page 9 shows that the development of the 281 hectares of land for employment uses led to the creation of over 17,000 jobs in the period 2000 to 2005. 15,000 of these jobs were created in Cardiff (7750), Newport (3673), RCT (1901) and Bridgend (1762). Figures are unavailable for Merthyr, and incomplete for Monmouthshire (10) and for the Pavilions office development in Torfaen. For the remaining authorities, the Table shows that 716 jobs were created in Blaenau Gwent, 620 in Caerphilly, 610 in Torfaen (incomplete data) and 100 in the Vale.

It is not known whether some of the employment development might be relocations, in which case the job creation figures should be treated with caution, as they may not necessarily be additional jobs created.

Table 3 below provides an estimate of the number of jobs created for each of the traditional employment use classes and provides an indication of the number of jobs per hectare for each use class. The figures used are those from the tables provided in Appendix 2 where the use class is clearly indicated and the numbers employed are known. Where a site is vacant or numbers unknown, the development is not included and this accounts for 22 hectares (the difference between the 253 hectares total in Table 1 and 231 hectares in Table 3). Where the site is indicated as in mixed use, even where it may be predominantly B2 (see examples in Bridgend), then for the purposes of this table the development is included in mixed use.

It can be seen from the table that whilst considerably less land was developed for B1 use (approximately 20% of the total land) it generated over half of the jobs created. As a consequence, the jobs per hectare ratio for B1 use is considerably higher than the jobs per hectare for land developed for B2 and B8 uses. The implications for the release of additional employment land in the future are discussed later in the Report.

Table 3 Job creation by use class and by jobs /land ratio, 2000-2005

	Hectares Developed	Jobs Created	Jobs per hectare
B1	44.01	9940	226
B2	75.58	3006	40
B8	72.95	1406	19
Mixed B1, B2, B8	38.56	2790	72
Total	**231**	**17,142**	**74**

2.5 Land Take-up compared with Development Plan provision.

The Brief also required a comparison between the developed land and UDP figures. Whilst each UDP or latest development plan for each local authority makes provision for employment land there is no separate system for monitoring its take-up. However, it is possible to compare the annual rate of take-up of the developed land with the annual requirement in each UDP or latest plan. This is set out in Table 4.

With the exception of Newport the annual take-up of land in each authority over the 2000-2005 period was less than the latest development plan provision. The figures indicate in quantative terms an adequate supply of employment land within the SEWEF region. However no analysis has been made of the quality of the sites and whether there are any constraints to their development. Whilst it is appropriate to provide flexibility over and above take-up rates, local authorities will be reviewing their employment land requirements during the preparation of their Local Development Plans and it is suggested that a 50% flexibility allowance over and above past take-up rates would be sufficient to provide a range and choice of sites.

Table 4 Comparison of Land Developed for Employment Purposes with Development Plan Allocation and Annual Requirement.

LOCAL AUTHORITY	UDP/ PLAN PROVISION (for 15 year period)	ANNUAL REQUIREMENT	ANNUAL TAKE-UP OF DEVELOPMENT LAND 2000-2005*
Blaenau Gwent	180	12.0	3.7
Bridgend	252	16.8	5.6
Caerphilly	185	12.3	2.0
Cardiff	220	14.7	8.2
Merthyr	75	5.0	1.8
Monmouthshire	90	6.0	0.04
Newport	200	13.3	14.9
RCT	280	18.7	5.5
Torfaen	100	6.7	2.2
Vale of Glamorgan	160	10.7	2.9
Total	**1742**	**116.2**	**46.84**

* Figure derived from ‘Developed land’ in Table 2.

2.6 Local Area Commentaries

Note: this Section should be read in conjunction with Appendix 2 "*Developed Employment Land 2000 – 2005*", which contains one schedule for each of the ten Local Authorities.

Blaenau Gwent

The employment land supply has remained constant in Blaenau Gwent over the study period, despite the development of 26 hectares of land in total (22 hectares for employment uses and 3.83 hectares for residential and retail), because new land has been included at Rassau extension (west) and adjoining Blaen y Cwm school. The actual supply is likely to be higher than the 2005 SEWEF figure as a further 8 hectares of land removed from this schedule at Rassau, Garden Festival and Crown Avenue remains available.

The total number of jobs created on the 22 hectares is 716. The major employment generating use is the B2 food processing development by Tillery Valley Foods which employs around 250 people at Cwmtillery Valley. Other centres of employment which have developed over the study period include the Glandwr Estate in Llanhilleth (100 jobs) and the Rising Sun site at Blaina/Nantyglo (100 jobs). Throughout Blaenau Gwent 15.5 hectares of the employment land developed are in B2 use. Of these uses, the major land consumer is the waste recycling facility developed by EnviroWales at Rassau which occupies a 5 hectare site and employs 40 workers at present. These facilities are being expanded to include a £20 million car battery recycling plant which it is hoped will lead to the creation of 130 new jobs.

At the former Dunlop Semtex factory at Brynmawr, the 3.83 hectares of land shown on the 2000 SEWEF schedule has been developed for housing (1.41 hectares) and for retail (2.42 hectares).

Like most of the local authorities in this study, the Blaenau Gwent County Borough Council does not currently monitor the development of industrial land systematically, instead choosing to focus on the *availability* of land through an annual updated register.

The UDP for Blaenau Gwent was adopted in 2006 and this allocates around 180 hectares of land for employment purposes for the period up to 2011. This study shows a 3.7 hectare per annum take up of employment land compared with a proposed UDP rate of 12.0 hectares per annum.

Bridgend

Bridgend has achieved one of the highest rates of employment land development throughout the SEWEF region, 44 hectares in total developed between 2000 and 2005. This achievement is in part a measure of the availability of general industrial land on the well-established Bridgend industrial estates and of the proximity to the M4 and to the South Wales labour markets. Of the 44 hectares of employment land developed between 2000 and 2005, 33.4 hectares has been for employment uses: 13 hectares for B8 uses, 12 hectares for B2 uses and almost 7 hectares for B1 uses.

A continuing plentiful supply of employment land in excess of 200 hectares remains in Bridgend despite the 45 hectare Wern Fawr site being deleted through the UDP process, although this site's deletion partly explains the reduced land bank from 270 in 2000 to 219 at 2005.

The major employers developing over the study period include Lloyds TSB (800 jobs) at land South West of Sony and Lidl (85 jobs) at their distribution centre adjacent to the Ford plant. At Bridgend Industrial Estate around 350 jobs and at Village Farm Road 150 jobs have been created in the study period. In total it is estimated that some 1,762 jobs have been created throughout Bridgend.

10.75 hectares of employment land have been lost to residential development at sites at Tondu (6.75 hectares) and the Pencoed Triangle site (4 hectares).

The UDP was adopted in May 2005 and this makes provision for some 252 hectares of industrial land up to 2016. The rate of development of employment land in Bridgend has averaged 5.6 hectares per annum, compared with the UDP provision of 16.8 hectares per annum.

The Bridgend County Borough Council monitors the development of employment land through both its Economic Development and Planning functions.

Caerphilly

In Caerphilly 12 hectares of employment land have been developed for employment uses: 11.07 hectares for B2 and 0.81 hectare for B1 uses. Most development has been focussed around the regeneration of the Oakdale Colliery where some 6 hectares have been developed for B2 uses and where the main employer is General Dynamics who have created 350 jobs. The remaining new B2 employment developments have been small scale in Bedwas (Industrial Estate), Ystrad Mynach (Dyffryn Meadows), Caerphilly (Western Industrial Estate), Rogerstone (Rogerstone Park) and Crumlin (Croespenmaen Industrial Estate). The only B1 development has taken place at Tredomen Business Park in Ystrad Mynach where 90 jobs have been created. There has been no new B8 development.

4.35 hectares of employment land at the Penallta Colliery in Ystrad Mynach and at Crossways Park in Caerphilly have been developed for residential and retail uses.

The Council produces information relating to industrial land availability which has been supplemented by a 2006 study by Atkins, although the Planning Section does not monitor the supply and demand situation as a matter of course.

The Caerphilly UDP has not been formally adopted but forms the basis of the Council's planning decisions until its replacement by the LDP in due course. Some 185 hectares of industrial land is allocated through the UDP for the period up until 2011. The take up rate of 2.0 hectares per annum over the study period is well below the UDP allocation of 12.3 hectares per annum.

Cardiff

Cardiff, more than any of the other areas, has experienced a greater overall level of development of employment land between 2000 and 2005, 44 hectares and 7750 jobs plus approximately 37 hectares for residential uses.

Employment growth over the study period has taken place on many industrial estates such as Cardiff Gate Business Park (8.09 hectares), Southpoint Business Park (7.2 hectares), Pacific Business Park (4.65 hectares) and Ocean Park (4.38 hectares). The growth in number of jobs at Cardiff Gate has been large and includes 1300 jobs at The Number 118118 which moved on to the site in 2000, 570 jobs at Scottish and Southern Energy and 225 at the International Baccalaureate Organisation in 2001, all of which contribute to the total 4000 jobs in B1 use class which have been created between 2000 and 2005. Cardiff Gate also developed 5 hectares of land for "*sui generis*" use by the Audi Centre and the motorway services. Elsewhere in Cardiff, approximately 900 jobs have been created at Ocean Park generally, 600 jobs at the Zurich Insurance call centre at Fusion Point, 300 jobs at Southpoint Business Park, 800 in Callaghan Square at Eversheds, ING and the Allied Irish Bank, 300 at Capital Business Park in Trowbridge and 350 at Celtic Gateway.

19 hectares have been developed for B8 uses, 10.3 hectares for B1 and 3.4 hectares for B2 uses specifically, plus 11.3 hectares of mixed B1 B2 and B8 use.

The single greatest consumer of employment land in Cardiff will be the retailing and leisure uses of the International Sports Village. To date this has resulted in the reallocation of approximately 35 hectares of employment land at the Celtic Gateway/Ely Fields business park and has been a major factor in the halving of the supply of employment land in the capital, from 114 hectares in 2000 to around 55 at 2005 according to the SEWEF schedules.

It should be noted that the SEWEF database under-represents the supply of industrial land at Capital Business Park, Wentloog Corporate Park and at Cardiff Gate and that this land to the east of the city provides the largest supply of industrial land post 2005. The SEWEF database shows 10.1 hectares at Capital Business Park whereas the Cardiff Business and Industrial Land Bank Monitoring schedule shows 9.2 hectares plus 14.6 hectares on adjoining land. The SEWEF figure for Wentloog is 7.3 hectares compared with 29 hectares in the schedule and for Cardiff Gate is 6.1 compared with 13.7 hectares in the July 2006 schedule. There are therefore a further 43 hectares of land not included in the 2005 SEWEF schedule.

In land use terms a large quantity of employment land in Cardiff has been lost to residential use over the six year study period on sites such as Roath Basin, Phoenix Brickworks, Willowbrook, Taff Basin, North Wentloog, Prospect Place and Victoria Wharf. A figure of 37 hectares for employment land used for residential is a guideline and should not be taken as a definitive figure because it has not been derived from the SEWEF database but from separate enquiries. However, in addition to employment *land*, many established employment *sites* have been lost during this period: Arjo Wiggins (Ely Paper Mill), Colchester Avenue Industrial Estate, Thermocouple site and adjoining land at Pentwyn and part of the Panasonic site, Atlas Works in Canton, the ROF on Caerphilly Road, the former Federal Mogul site and adjoining land at Cardiff Business Park. Also land at the northern end of Dumballs Road, Tyndall Street and Alfred Cooke House, home to Cyrus Engineering and Taylor Engineering are committed to, and the former Admiral House (ex BT) is currently being converted to, residential use. All these sites have been lost from employment to residential use. Other former employment sites have been lost to higher education and to leisure uses. The Cardiff case underlines a major problem for the study, that the database only shows employment land availability, and should perhaps be developed to show loss of employment land to other uses, and in particular housing.

The Cardiff UDP did not progress beyond the Deposit Stage of 2003 and planning decisions are consequently based on a combination of the policies of the UDP, the 1996 Cardiff Local Plan, and the 1996 South Glamorgan Structure Plan. The UDP provides an employment land requirement and 220 hectares is allocated for the 15-year period to 2016. The annual take-up of employment land in Cardiff for employment purposes has been 8.2 hectares per annum compared with the UDP allocation of 14.7 hectares per annum.

The Cardiff LDP is under preparation and will provide a single development plan for the area once adopted and will address the requirement for employment land up to 2021. Cambridge Econometrics have forecast that employment in Cardiff will grow by an additional 23,200 jobs (10.7%) by 2021 and, as 40% of jobs in Cardiff are taken by in commuters, the implications for accommodating this growth in Cardiff and the effect on the transport infrastructure will be a major consideration.

The Strategic Planning service within Cardiff Council maintains an annual register of available employment land that supplements the SEWEF data to gain an accurate picture of the supply situation. These figures have been relied upon in this study. The Economic Development department has supplied detailed information on occupiers and numbers employed.

Merthyr Tydfil

Figures for Merthyr are provisional. We have been unable to obtain detailed information from the Council. However, it would appear that Merthyr has achieved around 14 hectares of development on allocated employment land over the study period, 10.85 hectares for employment uses and 3.38 hectares for residential uses.

The development of 14 hectares has been achieved within a context of the supply of 47 hectares of land in 2000, providing the fourth highest ratio of development to allocated land across all of the unitary authorities. The Merthyr ratio is 23 % compared with Cardiff 43%, Newport 26% and Blaenau Gwent 24%. Like most other areas within the SEWEF region Merthyr has experienced some loss of employment land to other uses with the Willows South and Cyfarthfa Plateau sites both being developed for housing.

There do not appear to be any new employment sites added to the SEWEF schedule over the study period. However the Merthyr Tydfil Local Plan was adopted in 1999 and this makes special provision for a further 21 hectares on the Rhydycar West site for regional employment, which has not been fully accounted for in the SEWEF figures. Merthyr Tydfil did not make any significant progress with its UDP and will review its employment land requirements in the LDP.

The total Local Plan employment allocation of 75 hectares equates to an annual average of 5 hectares, compared with the ‘provisional’ annual rate of development of 1.8 hectares.

Monmouthshire

Monmouthshire has experienced an exceptionally low rate of employment land development with only 1.37 hectares of new development within the study period. This amounts to little more than 1.7% of the 82 hectares available at the start of the SEWEF study period. There has been only 0.24 hectares developed for employment uses and 1.15 hectares for retail and residential uses. There are however current proposals being considered by the County Council for the Newhouse Park Estate that should yield further industrial development in the near future and which should bolster the low rate of development achieved so far.

Information on the jobs created on the developed sites is available for only one of the two sites: 10 jobs at Hicks Logistics, Severnbridge.

The available supply of land stands at around 72 hectares at 2005 according to the SEWEF schedule. There have been no new allocations and one loss of 1.7 hectares at the Llanfoist Depot.

The Monmouthshire UDP is adopted and makes provision for 90 hectares of industrial and business land over the period 1996-2011 which equates to a take up rate of 6 hectares per annum. The employment land requirement will be considered afresh when the Council commences work on their Local Development Plan, although there is no timetable for preparation at the present time.

Newport

Newport has achieved the highest level of employment land development throughout the region at a total of 114 hectares over the study period. This rate of development includes some 25 hectares of development for non-employment uses, principally food retail (10 hectares) and housing (15 hectares). At Newport it is important to note that the development rate includes the recycling of some existing industrial premises, such as those of Monsato, LG and Corus. This may well not be the case in other authorities.

89.46 hectares have been developed for employment purposes, providing 3673 jobs. Newport hosts the single largest developed site in the region, the Tesco and Wilkinsons distribution centre at Gwent Europark which occupies 42 hectares and employs 95 and 900 people respectively. The remaining balance of Class B employment development is more in keeping with the levels achieved in Cardiff and Bridgend. Another large employment site developed over the study period has been Newport Docks where 21.20 hectares has been developed for B2 uses. Occupiers include Sims Metal (110 jobs), Jewsons (47 jobs) and Severn Sands (28 jobs).

Other large employers who have moved to employment-allocated land between 2000 and 2005 include Bisley Office Equipment who occupy 2.90 hectares at Reevesland

Industrial Estate and provide 500 jobs, Wales and West Utilities with 350 jobs and HM Prison Service with 330 jobs at Celtic Springs, the Quadrant at Cleppa Park where it is estimated that 200 jobs have been created, Wern Industrial Estate where it is estimated that Avana Bakeries employ 180 people, the Royal Mail at Mill Street where there are 160 jobs, Langstone Business Park with approximately 135 jobs and the LG site where Quinn Radiators have created 110 jobs.

Newport has enjoyed the highest take-up not only of B8 employment land in the study area: 44 hectares represents over half the total for the SEWEF Region but also the highest take-up of B2 land at 39 hectares which is 43% of the total for the SEWEF Region. By contrast, the take-up of B1 land at 7.9 hectares is small in comparison with RCT and Cardiff.

In keeping with the trend established elsewhere within the growth areas along the M4 corridor, Newport has lost some of the available employment land to other uses: 10.46 hectares to food retail at Crindau Transco, and 14.49 hectares to residential at the Lysaghts Institute, Gloucester Wharf, Rodney Parade and East Dock Road. However, with an identified supply of over 300 hectares at the time of the SEWEF 2005 survey this will barely impact on the overall quantum of employment land available. Large new industrial land allocations are made through the adopted Newport UDP at Tatton Farm and Nash Road but these do not feature on the SEWEF 2005 schedules. The UDP requirement is for 200 hectares over the plan period to 2011, but new allocations and existing commitments are in excess of 300 hectares. The rate of take up of industrial land at 14.9 hectares per annum exceeds the UDP provision of 13 hectares per annum.

Rhondda Cynon Taff

RCT has developed 33 hectares for employment land use, most of which is in the southern part of the County.

The L'Oreal extension at Garth Isaf has been the largest development in terms of size in RCT between 2000 and 2005. Six other developments extended over one hectare, including a further 2.06 hectare development at Garth Isaf for units and workshops for Thompson Broadband, M & M Medical amongst others. The five other sites over one hectare in size are: Parc Nantgarw where 4.54 hectares have been developed into 9 units and occupied by Cadw and others; Bryn Pica landfill site at Llwydcoed, Aberdare where new offices and improved recycling and composting facilities have been developed and 34 people are employed; the former East Glamorgan Hospital site in Church Village now occupied by Local Health Trust offices employing 40; Gwaun Ely, Llantrisant where high tech units have been built and Marks International Ltd employs 40; and at Nipa, Llantwit Fardre where 1.35 hectares is occupied by Clariant chemical manufacture employing 40 people.

RCT has attracted 1901 new jobs in the study period, compared with 7750 in Cardiff, 3673 in Newport and 1762 in Bridgend. Of the 1901 jobs, 1423 were created on 14.92 hectares for B1 use classes, 182 on 2.43 hectares for B2 use classes and the remaining 296 jobs on sui generis and mixed use sites. The largest new employment site in terms of job creation is north of the Travellers Rest in Abercynon for RCT offices where there are 400 jobs.

There have been four developments in the Abercynon area (north of the Travellers Rest, at Navigation Park, Pontycynon Industrial Estate and at Ynysybwl) and four developments further north. These have been at Bryn Pica (sui generis and B1 uses for Amgen Cymru's waste management and recycling centre and Encia Consulting), Hirwaun Industrial Estate (sui generis use for Verdant waste management), Aberaman Industrial Estate (B2 uses- Every White extension, District Energy and Showa extension), and at the Polikoff site in Treherbert (for B2 use) which is currently vacant.

The RCT Table in Appendix 2 shows a further 3 new employment sites are currently vacant. However in RCT there have been many new developments completed in 2006 (including the Ensinger site at Parc Eirin, Tonyrefail which now employs 111 people), under construction and in the pipeline. The 18 hectare Dragon Film Studios site at Llanilid will help to address any loss of employment land but this remains undeveloped during the study period.

In RCT only 1.6 hectares of former employment land at Cadwalladers Yard in Llantwit Fardre was developed for residential use and this was following an appeal.

The development plan position in RCT is complicated by the existence of old style development plans from the former Borough Councils and the Mid Glamorgan County Council. The Plans provide for a total RCT employment land allocation of approximately 280 hectares (15 hectares in Rhondda, 170 hectares in Taff Ely, and 95 hectares in Cynon Valley) which implies a requirement for 18.7 hectares per annum compared with a take-up of only 5.5 hectares per annum over the 2000 – 2005 period.

Work has commenced on the LDP and this will serve to consolidate employment land policy across a unified area. The Council has published an early release LDP topic paper into future industrial land requirements and this suggests that some 225 hectares of land would be required over a fifteen-year period.

Torfaen

In Torfaen 13 hectares of land has been developed for employment purposes, mainly south of Pontypool at the established industrial estates of Llantarnam, Pontyfelin and Mamhilad. 5.8 hectares has been developed for B1 use, 5.2 hectares for B2 uses plus 0.8 hectares for mixed use and 1.3 hectares for sui generis.

The number of jobs created at the Pavilions office development at Llantarnum Park is not known but notwithstanding this, 311 jobs have been created on other parts of the site by Capita Gwent Consultancy, a warehouse and an electroservices office, and the Innovation centre. Elsewhere 130 jobs have been created at the Eastern Valley Housing Office at Lower Mill, 55 at the Gilchrist Thomas estate in Blaenavon, and in B2 use class, 34 jobs at Easibake Foods in Pontypool and 80 jobs at Carlisle car components and Ultrapharm on the Mamhilad Technology Park, giving a total of 600 jobs.

Some land has been lost from employment use with, for example, the development of part of the Lower Mill site for hotel and restaurant purposes. A detailed search of recent planning applications also indicates that some 13 hectares of employment land in the South Pontypool/Cwmbran area has been lost to residential use (source: TCBC).

In total, therefore, around 26 hectares of industrial land has been developed for employment and other purposes from the 87 hectares of land available for employment in 2000. Nevertheless, 71 hectares of land remains available according to the 2005 SEWEF schedule.

The Council adopted the Torfaen Local Plan in 2000 and decided not to progress with the preparation of a UDP. Baseline information is currently being compiled which will inform the preparation of Strategic Options for the LDP, including a comprehensive authority-wide employment land review. For the time being, therefore, the Council is working to the strategic land policies of the Gwent Structure Plan, which makes provision for some 100 hectares over the fifteen-year period 1991 to 2006.

The Structure Plan requirement of 6.7 hectares per annum compares with an actual rate of development of 2.2 hectares per annum over the 6-year study period.

Vale of Glamorgan

In the Vale the employment land that has been developed has not been for the B1 use classes but for B2 and B8 uses (100 jobs) and sui generic and the amount of development has been extremely small.

The original SEWEF figures for the Vale for 2000 were revised by Economic Development staff at the Vale, from 122 hectares to 175.6 hectares, with changes increasing the availability of land at Vale Business Park, Miskin, Barry Docks, and Hayes Road.

In quantitative terms, only 3.3 hectares has been developed for employment purposes, B2 and B8 uses. 64 jobs have been created on the Atlantic Trading Centre and 6 on the Vale Business Park. A further 30 jobs have been created at the Cardiff International Airport Business Park.

In addition, 11.46 hectares has been developed for uses including a car park and hotel at the Cardiff International Airport Business Park and 0.77 hectare for a car dealership at the Llandough Trading Estate. A further 0.4 hectares has been lost to housing development at the Palmerston Trading Estate.

The overall land availability situation remains healthy and has been increased above the 2000 position by the inclusion of the 54 hectares of land adjacent to the M4 at Miskin. The 2005 SEWEF survey reported a supply of 144 hectares.

The UDP makes provision for a total 199 hectares of employment land over the fifteen-year period to 2011. The rate of take up of employment land at 2.9hectares per annum is well below the UDP requirement of 10.7 but with the recent announcement that the Defence Training Academy will be located at St Athan there is potential for an increase in the demand for industrial land in the vicinity to accommodate associated businesses.

3. ANALYSIS OF DEVELOPED EMPLOYMENT LAND BY WALES SPATIAL PLANNING AREAS

The SEWEF data identifies a 1991 electoral division code for every site and this has facilitated an analysis of the development of industrial land by the three action areas proposed by the Wales Spatial Plan South East Wales Group, namely:

Heads of the Valleys Plus – an area comprising the Upper Valleys of South East Wales and which is facing some of the greatest economic and social change challenges of the late 20th century.

Connections Corridor – an area of Mid Valleys and rural South East Wales increasingly under pressure for economic and housing development spilling out of cities. The area has a crucial role in connecting the growth in city areas with the deprivation in the Heads of the Valleys.

City Coast – an area including the two main cities of Cardiff and Newport as well as smaller rural and coastal communities with a high quality of life.

These boundaries are illustrated against a background map of the SEWEF region for reference at Appendix 1.

Table 5 Population estimates for the Spatial Planning Areas

Area	Mid year estimates		Percentage change
	2001	2004	2001-2004
Heads of the Valleys Plus	275,410	271,311	-1.5%
Connections Corridor	450,248	453,858	0.8%
City Coastal Zone	673,643	687,829	2.1%
South East Wales	**1,399,301**	**1,412,998**	**1.0%**
Rest of Wales	1,510,931	1,539,464	1.9%
Wales	**2,910,232**	**2,952,462**	**1.5%**

Source: ONS Small Area Population Estimates

Table 5 includes mid-year population estimates for the three Spatial Planning Areas for 2001 and 2004. The population of the Heads of the Valleys Area is approximately 20% of the total population of the SEWEF Region and over the 2001-2004 period declined by 1.5%. The Connections Corridor Area accommodates approximately 32% of the total population of the SEWEF area and over the 2001-2004 period grew by 0.8%. The remaining 48% of the population lives within the City Coastal Area and this had the highest percent of growth which was 2.1% over the same period.

As the Spatial Planning Areas are based on 2005 ward boundaries they are not necessarily contiguous with the 1991 electoral divisions used for the SEWEF surveys. It has been necessary therefore using the ONS Ward History Database to attribute each site developed to current ward boundaries, and subsequently to the corresponding Spatial Planning Zone.

Table 6 Supply of Employment Land at 2000 by Spatial Planning and by Local Authority Areas

	Heads of the Valleys Plus (Ha)	**Connections Corridor** (Ha)	**City Coastal** (Ha)	**Total Land Available** (Ha)
Blaenau Gwent	90.0	-	-	90.0
Bridgend	7.2	129.1	133.8	270.1
Caerphilly	5.0	140.0	-	145.0
Cardiff	-	-	114.0	114.0
Merthyr Tydfil	47.1	-	-	47.1
Monmouthshire	-	20.1	62.1	82.2
Newport	-	-	336.0	336.0
RCT	49.9	136.3	-	186.2
Torfaen	21.4	65.3	-	86.7
Vale of Glam	-	-	122.1	122.1
Spatial Planning Area	**220.6**	**490.8**	**768.0**	**1,479.4**

Table 6 categorises the total amount of industrial land available within the Spatial Planning Areas, by individual local authority.

It can be seen from the table that there is a strong bias towards the availability of employment land within the City Coastal Area which is the coastal M4 corridor belt, with over half of all the land at 2000 being located within this zone. The Connections Corridor area accounts for a third of the available land and the Heads of the Valleys less than one sixth.

Table 7 Development of Employment Land by Spatial Planning Areas

	Total Land Available 2000 (Ha)	**Developed land B1 B2 B8 uses (ha)**	**Developed land Other employment generating uses i.e. mixed use & sui generis (ha)**	**Total land developed for employment uses 2000-2005 (ha)**
HOVP	220.6	30.58	5.55	36.13
CONN	490.8	57.67	9.66	67.33
CICO	768.0	145.88	31.68	177.56
Total	**1,479.4**	**234.13**	**46.89**	**281.02**

Table 7 uses the same information as Table 2. It shows that the City Coastal bias is extended when the amount of development for employment uses, 2000-2005 is apportioned across the Spatial Planning Areas: 63% of all development in the SEWEF area has occurred within the City Coastal area, 13% in the Heads of the Valleys area and 24% in the Connections Corridor.

Using these figures, the percentage take up of land developed for employment is higher too in the City Coastal area with 23% of available land within that area being developed over the 6-year study period, compared with 16% of the available land being developed in the Heads of the Valleys area and 13 % in the Connections Corridor.

Table 8 Type of Employment Development Achieved on Employment Land by Spatial Planning Areas, 2000-2005

	Total hectares available for employment	**Predominantly B1 (ha)**	**Predominantly B2 (ha)**	**Predominantly B8 (ha)**	**Mixed use (ha)**	**Sui generis & other employment uses (ha)**	**Total hectares developed for employment**
HOVP	220.6	10.40	16.86	3.32	5.32	0.23	36.13
CONN	490.8	26.92	24.46	6.29	2.62	7.04	67.33
CICO	768.0	19.11	51.36	75.41	11.38	20.30	177.56
Total	**1,479.4**	**56.43**	**92.68**	**85.02**	**19.32**	**27.57**	**281.02**

Table 8 breaks down the development of employment land into Use Classes and Spatial Planning Areas. This shows the same breakdown by Use classes as in Table 2: B2 and B8 predominate: 93 hectares and 85 hectares respectively, compared with 56 hectares for B1.

Most B1 activity in 2000-2005 has taken place in the Connections Corridor, 26.92 hectares, almost equal to the other two Spatial Planning Areas together.
Most B2 activity has occurred in the City Coast Area, 51.36 hectares, more than the other two Spatial Planning Areas together.
Most significant of all, 75.41hectares, 89% of the total B8, has taken place in the City Coast Area.

Table 9 Job Creation 2000 – 2005 by Spatial Planning Area

	B1	**B2**	**B8**	**MIX**	**TOTAL**
HOVP	73 jobs 3.36 ha	522 jobs 14.53 ha	nk	203 jobs 6.63 ha	798 jobs 24.52 ha
CONN	2,702 jobs 22.48 ha	787 jobs 17.96 ha	nk	677 jobs 8.79 ha	4,166 jobs 49.23 ha
CICO	7,165 jobs 18.17 ha	1,697 jobs 43.09 ha	1,406 jobs 72.95 ha	1,910 jobs 23.14 ha	12,178 jobs 157.35 ha
TOTAL	**9940 jobs** **44.01 ha** ***226 jobs/ ha***	**3006 jobs** **75.58 ha** ***40 jobs/ha***	**1406 jobs** **72.95 ha** ***19 jobs/ha***	**2790 jobs** **38.56 ha** ***72 jobs/ha***	**17,142 jobs** **231.10 ha** ***74 jobs/ha***

Table 9 provides a breakdown of the jobs created by use class for each of the Spatial Planning Areas. It includes only those sites where the number of jobs generated is known. It must be remembered that the information is incomplete as no information was provided for Merthyr on jobs created, some sites in RCT for example are vacant and the number of jobs created is not known on a few remaining sites. These gaps account for the remaining 22 hectares of land developed for B1 B2 and B8 uses. The information is the same as that in Table 3. The figures illustrate the bias towards the City Coast Area for job creation. The 44.01 hectares developed for B1 have created 9940 jobs with 72% of jobs located in the City Coast; the 75.58 hectares of B2 have created 3006 jobs with 56% of these jobs located in the City Coast; and the 72.95 hectares of B8 have created 1406 jobs, all in the City Coast.

4 EMPLOYMENT CHANGES IN LOCAL AUTHORITIES FROM EXISTING DATA

This section of the report provides an analysis of employment change in the ten local authorities comprising the SEWEF area over the 2000 to 2005 period based on existing data. Whilst the previous section of the report provides an analysis of the take up of employment land and jobs created over the period, this only provides a partial indication of employment change as an element of the changes in employment will have been on land not identified on the SEWEF schedules.

There is a variety of existing data sources to provide estimates of employment change. The National Assembly for Wales Statistical Bulletin (SB 45/2006) examines a variety of existing data sources to provide an estimate of workplace employment, or total jobs, by industry sector and local authority areas. Table 3.1 which is included in Appendix 3 provides total workplace employment for local authority areas in South East Wales and extracts information from SB 45/2006. This table does not make use of any Annual Business Inquiry data and is thus based on local Labour Force Survey/Annual Population Survey data alone which are currently available to 2005. The table only covers the period 2001 to 2005, as there is no comparable data available for 2000.

Between 2001 and 2005 workplace employment increased by 3% in South East Wales which was below the 6% increase in Wales as a whole but above the 2% increase across the UK.

According to the statistics, Blaenau Gwent had the largest percentage increase (up 10%) followed by the Vale of Glamorgan (up 9%) and Rhondda Cynon Taff (up 8%). Over the same period two local authorities experienced falls in workplace employment namely, Merthyr Tydfil (down 8%) and Newport (down 2%).

In order to further examine the relationship between employment growth and the take-up of employment land it is necessary to analyse the components of employment change over the period.

The Welsh Assembly Government publications STATSWALES provides estimates for workplace employment at the local authority area for broad industry sectors. This information is available for the 2001 to 2004 period and is set out in Table 2 in Appendix 3**.**

The table only covers the 2001 to 2004 period as no comparable information is available for 2000 and 2005.It shows that the numbers employed in agriculture and hunting, forestry and fishing in South East Wales are relatively small and have declined by a further 6%. There was a loss of 10,900 jobs in production and construction over the 2001 to 2004 period with the largest percentage loss in Merthyr Tydfil (down 24%), followed by Newport (down 21%) and Blaenau Gwent (down 14%), the latter two authorities suffering from the closures of Corus's steel operations at Llanwern and Ebbw Vale in this period. However, there were increases in Torfaen (plus 1%) and the Vale of Glamorgan (plus 13%).

The service sector in South East Wales continued to grow with an increase in 27,300 jobs (up 6%). The highest percentage growth was in Blaenau Gwent (up 17%) followed by Cardiff (up 9%) and Bridgend (up 8%). Both Caerphilly (down

1%) and the Vale of Glamorgan (down 3%) registered a decrease in employment in the service sector over the 2001 to 2004 period.

The above analysis is based on workplace employment estimates which provide the most reliable information when comparing estimates over time. The Annual Business Inquiry (ABI) conducted by the Office for National Statistics (ONS) categorises numbers of employee jobs into industry groupings and detailed geographical breakdowns. However, the ABI includes employee jobs only and excludes self-employed, government supported trainees and HM Forces. As is stated in Statistical Bulletin SB 45/2006 the ABI "*is more suited to cross- sectional analysis than it is for comparisons over time*". The employee jobs included in Tables 3, 4 and 5 of Appendix 3 are obtained from Nomis information which is based on the ABI. The tables provide a comparison of the changes in the sectors for each local authority over time and therefore must be treated with caution. However they are the main source of information for disaggregating employee jobs into industry groupings and provide a valuable indication of trends.

Table 3 in Appendix 3 is derived from Nomis and includes estimates of the total employee jobs by local authority area in the South East Wales Economic Region over the period 2000 to 2005.The table indicates an increase in employee jobs in South East Wales of 40,200 (plus 7%) This scale of growth indicates a much higher level of growth in employment than was identified in the workplace employment tables (plus 3%). There are also variations in the estimates for the local authorities. In particular the workplace employment figures for the Vale of Glamorgan identified a growth in employment of 3000 jobs over the 2001 to 2005 period, whereas the Nomis data estimates a 5,100 loss in jobs over the 2000-2005 period.

Table 4 in Appendix 3 provides an estimate of changes in employee jobs over the 2000 to 2005 period for the manufacturing, construction and service sectors. For South East Wales as a whole this indicates a decline in manufacturing (down 20%) and an increase in construction (plus 7%) and the service sector (plus 16%).

The Nomis data provides a further disaggregation of the service sector and this is shown in Table 5 Appendix 3**.** As it is providing a comparison of change over the study period the information should be treated with some caution particularly the estimates for each local authority. However it is of value in identifying the main sectors within the service sector which have contributed to the growth in employee jobs over the 2001 to 2005 period. The highest percentage growth for South East Wales was in transport and communication (up 28%) followed by banking, finance and insurance (up 24%) and public administration, education and health (up 17%).

The conclusions of this analysis are that over the 2001 to 2005 period employment growth occurred as a result of growth in the service sector and in particular transport and communications, banking, finance and insurance and public administration, education and health. The main user of employment land i.e. manufacturing has continued to decline and if as it appears likely this trend will continue into the future then this will have implications for employment land allocations in Local Development Plans. The next section of the report considers the implications of employment growth forecasts.

5. REVIEW OF EMPLOYMENT FORECASTS

This section of the Report reviews forecasts of employment growth in the South-East Wales Region and the implications these may have on future site availability. Cambridge Econometrics has forecast employment growth in the South-East Wales area which is contained in the table below. There is also a comparison between the annual percentage forecast change and that which occurred over the 2001 – 2004 period

Table 10 Employment Forecasts for South East Wales by Broad Industry 2005 – 2016

(Numbers in thousands)

	2005	2016	CHANGE LEVEL	CHANGE ANNUAL PERCENT CHANGE 2005 - 2016	ANNUAL PERCENT CHANGE 2001 – 2004 (1)
Agriculture Hunting, Fishing & Forestry	9.2	7.8	-1.4	-1.26%	-1.38%
Production and Construction	144.6	126.2	-18.4	-1.53%	-1.86%
Services	511.7	561	+49.3	+0.8%	+1.70%
Total	**665.5**	**695**	**+29.5**	**+0.37%**	**+0.57%**

Source: Cambridge Econometrics March 2006 and (1) Welsh Assembly Government Stats Wales.

Cambridge Econometrics forecast a growth in employment in South East Wales of 29,500 net additional jobs over the 2005 to 2016 period. This represents an annual growth rate of 0.37% which compares with the annual growth rate of 0.57% that occurred over the 2001 – 2004 period. A continuation of the 2001-2004 growth rate would indicate an employment growth of 42,000 jobs over the 2005 – 2016 period. Cambridge Econometrics forecast a continuation in the decline in agriculture, hunting, fishing, forestry and production and construction at slightly lower levels than occurred over the 2001- 2004 period. The service sector is forecast to grow at a lower growth rate of 0.8 % per annum than the 1.7% per annum that occurred 2001-2004.

Over the 2005 – 2016 period the numbers employed in the service sector in South East Wales is forecast to increase by 49,300 jobs. Table 11 identifies the components of the service sector forecasts over the 2005 – 2016 period.

Table 11 Components of service sector forecast over 2005 – 2016 period for South East Wales

	CHANGES 2005 – 2016	**%**	**USE CLASS**
Distribution	+ 3100	+ 10%	B8
Retailing	+ 4200	+ 6%	A1
Hotels and Catering	- 100	- 0.3%	A3, C1
Transport & Communications	+ 4000	+ 12%	B1
Financial and Business Services	+ 17200	+ 16%	B1
Public Admin & Defence	+ 900	+ 2%	Existing Council offices, police, fire service etc. Some B1 Use.
Education	+ 2000	+ 3%	Existing schools, universities etc. Some B1 Use.
Health & Social Work	+ 9500	+ 11%	Hospitals and Medical Centres, Nursing Homes etc C&D Use.
Misc. Services	+ 8500	+ 21%	Recreation, cultural, sporting activities, personal services – Small proportion would require B1 space.
Total	**+ 49300**	**+ 10%**	

Table 11 provides an indication of the likely use class for those areas of the service sector which are forecast to grow over the 2005 to 2016 period. The main growth areas i.e. financial and business services, health and social work and miscellaneous services account for over 70% of the forecast growth of employment in the service sector and most of this growth will not require employment land.

In preparing LDP's local authorities should take into account these trends when preparing their employment land forecast for their LDP's. Traditional methods of forecasting, employment land requirements have estimated job growth over the plan period and applied a job/land ratio figure ranging from 25 to 50 jobs per hectare. With manufacturing jobs forecast to continue to decline and the growth in employment in the service sector forecast to continue in the future applying these traditional assumptions will lead to an over-allocation of employment land. The major part of the growth in employment is likely to be in B1 uses.

Table 3 of this Report provided an indication of the jobs generated in the SEWEF region, 2000 – 2005 by use class and the jobs/land ratio. Over half the jobs created over the 2000 – 2005 period were in the B1 Use Class at approximately 253 jobs per hectare. Table 12 provides a broad indication of the range of employment land required based on the Cambridge Econometrics Forecast of 29,500 jobs and the 42,000 jobs based on the 2001 to 2004 trend. It assumes that all these jobs will require employment land which is unlikely and the jobs will be divided into the same category of Use Classes in the same proportion as occurred over the 2001 to 2005 period and the land will be developed at the same jobs/land ratio that occurred over the 2000 – 2005 period.

Table 12 Estimate of Land Required in SEWEF Region 2005 – 2016

Cambridge Econometrics Forecast

	Employment Growth	Hectares Required
B1	16816	74
B2	5085	127
B8	2379	125
Mixed B1, B2 and B8	4720	66
Total	**29000**	**392**

2001 – 2004 Trend

	Employment Growth	Hectares Required
B1	24354	108
B2	7365	184
B8	3445	181
Mixed B1, B2 and B8	6836	95
Total	**42000**	**568**

On the assumption that all new jobs will require new employment land this provides an estimate of a land requirement in the SEWEF area over the 2005 - 2016 period of between 392 hectares and 568 hectares.

Another way of estimating land requirements is to assume that the rate of take up of employment land that occurred over the 2000 to 2005 period will continue up to 2016. The rate of take up over the 2000 to 2005 period was approximately 47 hectares per annum which would indicate a requirement of approximately 550 hectares over the 2005-2016 period, which lies towards the upper part of the above range.

These estimated land requirements compare with the supply identified on the SEWEF Schedules at 2005 of 1389 hectares. As stated in section 2.4 of this Report there is a requirement for flexibility in land supply to ensure that potential employers have a range and choice of sites to meet their requirements. It is also important to ensure that employment sites are readily available and are not constrained. No analysis has been undertaken of the 1389 hectares to identify potential constraints. However, the figures would indicate that in quantative terms there is more than an adequate supply of employment land available to meet forecast employment growth up to 2016 in the SEWEF Region. Whilst this is a detailed matter which should be reviewed by each local authority when preparing their LDPs, it would seem appropriate that in the future in considering employment land requirements there should be greater emphasis on allocating good quality land attractive to potential developers rather than allocating large quantities of land regardless of whether it is attractive to the market.

6. SUMMARY AND CONCLUSIONS

Further analysis of the SEWEF employment land schedules has identified that 281 hectares of employment land has been developed for employment uses over the study period 2000 – 2005. The majority of this land (253 hectares) was developed for B1, B2 and B8 uses and the remaining 28 hectares for sui generis, A2, A3, C2 and D1 uses. In addition approximately 85 hectares of employment land was developed for housing and 16 hectares for retailing over the same period.

Over the study period there was a slight reduction in the employment landbank with 1479 hectares available in 2000 and 1389 hectares available in 2005.

The highest rates of development were in the coastal belt where the three authorities of Newport, Cardiff and Bridgend developed 172 hectares (61%) of the 281 hectares total. RCT developed a similar amount of land for employment as Bridgend, with most of the RCT development in the Connections Corridor and a small amount in the Heads of the Valleys plus.

The study also categorised the developed land by use class and found that for the region as a whole there were roughly similar amounts of land developed for B2 and B8 use, 93 and 85 hectares respectively followed by 56 hectares of land developed for B1 use.

On the basis of known information, the development of 231 hectares led to the creation of 17,142 jobs during the study period with the majority of these jobs (88%) concentrated in the 4 authorities of Cardiff, Bridgend Newport and Rhondda Cynon Taff.

The study found that whilst a smaller amount of land was developed for B1 use (20%) than that developed for B2 or B8, B1 uses contributed to approximately 58% of the jobs created. Consequently the number of jobs created per hectare for B1 use (226 per hectare) was considerably higher than the jobs per hectare figure for B2 (40 per hectare) and B8 (19 per hectare).

A comparison between the rate of take up of the employment land and the employment requirement in the current development plan for each local authority, with the exception of Newport, indicates that the take up is below the annual development plan requirement.

The total annual take up of employment land of 47 hectares per annum for the SEWEF region over the study period compares with the annual requirement for all of the development plans in the region of 116 hectares per annum.

The analysis of the data by Wales Spatial Planning Areas revealed that there is a strong bias towards the availability of employment land within the City Coast area which also experienced the highest take-up of land followed by the Connections Corridor and the Heads of the Valleys Plus areas.

Whilst the Connections Corridor developed the highest amount of B1 land the City Coast Area developed the highest amount of B2, B8, mixed uses and other employment generators. The number of jobs created was also concentrated in the City Coast area with over 70%.

Analysis of the official employment statistics show a growth in employment over the study period of + 3% with variations between local authorities ranging from -8% in Merthyr Tydfil to +10% in Blaenau Gwent. The analysis revealed a continuation of the decline in the agriculture, manufacturing and construction sectors with an increase in the numbers employed in services.

The review of employment forecast indicated a continuation of these trends with employment forecast to grow up to 2016 with the continued decline in agricultural, production, construction and an increase in the service sector.

Within the service sector the main growth areas which are forecast to account for over 70% of the growth are:

- financial and business services
- health and social work and
- miscellaneous services.

It is evident that many of those sectors which are forecast to grow up to 2016 will not require employment land.

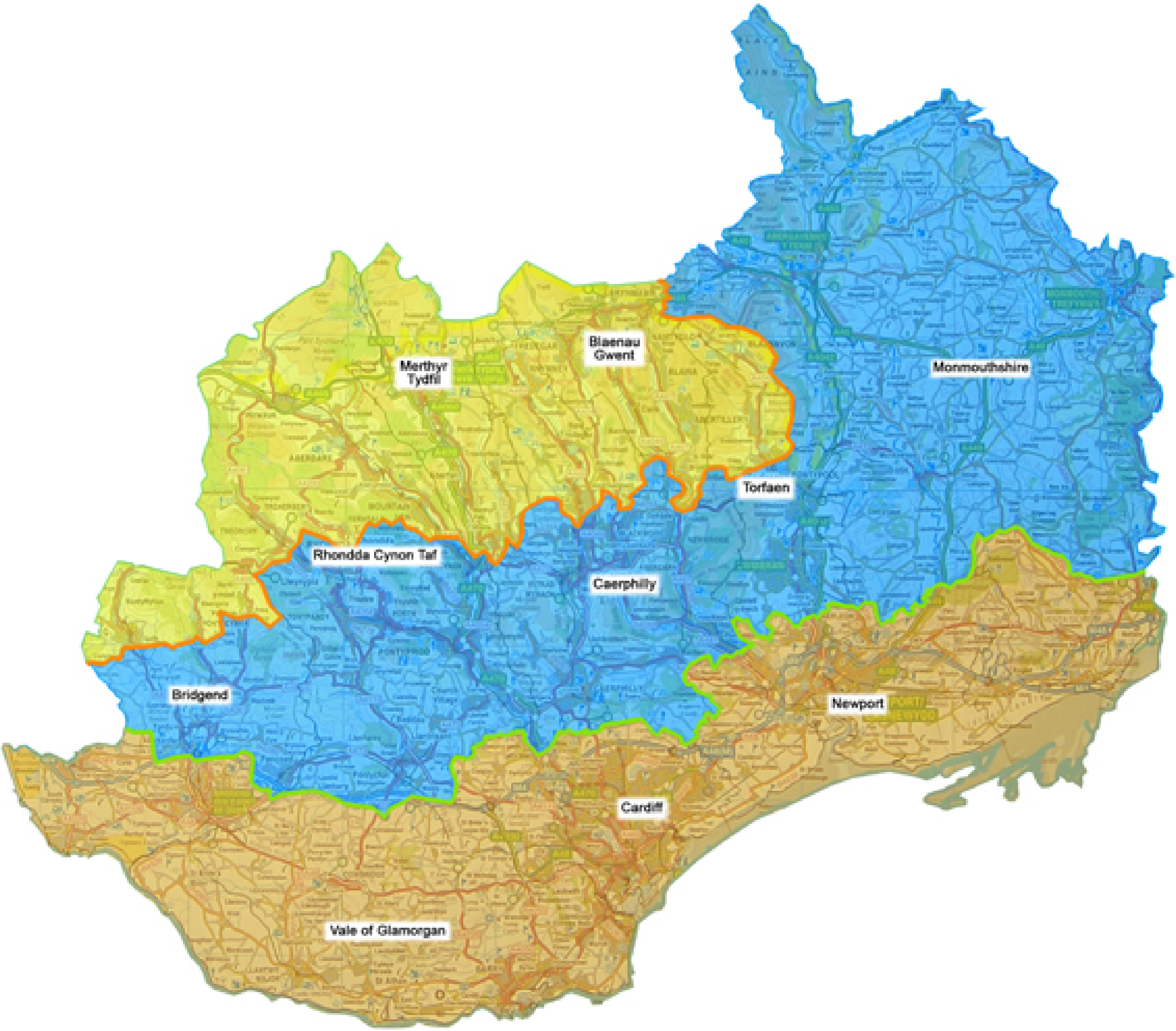
However on the basis of the most optimistic assumption that all jobs will require employment land and assuming a similar split in employment to use classes as occurred in the 2000 – 2005 period it is estimated that there is a total land requirement for the SEWEF region of between 392 and 568 hectares over the 2005 -2016 period which compares with an identified land availability in 2005 of 1389 hectares.

It is unlikely that the large proportion of the employment growth will require employment land and therefore the assumptions about future land requirements are optimistic. However it is important to ensure an adequate range and choice of employment land in the future which will require some flexibility of supply but instead of the emphasis being on the quantity of land available greater emphasis should be given to ensuring that good quality employment land is allocated in LDPs which will be attractive to the market.

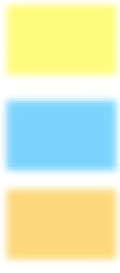
APPENDIX 1

STUDY AREA

Study Area for Further Analysis of Land Survey Data



Key:



Yellow	Heads of Valleys Plus (HOVP)
Blue	Connections Corridor (CONC)
Orange	City Coast (CICO)

APPENDIX 2

EMPLOYMENT LAND DEVELOPED 2000 - 2005.

Blaenau Gwent

Bridgend

Caerphilly

Cardiff

Merthyr

Monmouthshire

Newport

RCT

Torfaen

Vale of Glamorgan

BLAENAU GWENT

Employment land developed between 2000 & 2005

Employment uses — **Totals: 22.08 hectares, 716 jobs**

	Size (Ha)	Occupiers	Use Class	Nos Employed
Cwmtillery Valley	0.81	Tillery Valley Foods	B2	250
Garden Festival Wales A Ebbw Vale	0.38	Polymer Healthcare	B2	12
Rassau platforms L & M	5.00	Enviro Wales	B2	40
Glandwr Estate, Llanhilleth	4.80	Multi occupation	B2	100
Waun y Pound Phase 1, Ebbw Vale	1.18	Wil MorWil	B1 B8	53
Barleyfields Phase 1 & 2	1.28	Multi-occupation	B2	51
Llanhilleth Estate Units	0.10	Multi-occupation	B2	18
Tredegar Business Park	1.85	Multi-occupation (VITCC/INNOVA 1)	B1 B8	15
Garden Festival Wales E, Ebbw Vale	1.70	Multi-occupation(Innovation Centre)	B1	30
Upper Cwmcrachen Plateaus A & B, Nantyglo	1.38	Multi-occupancy	B2	12
Rising Sun, Blaina/ Nantyglo	1.26	Creative Print & Design	B2 B8	100
North Roseheyworth, Cwmtillery	2.34	Atraverda & Optical Alliance	B2 B8	35

Other uses — **Total 3.83 hectares**

West of Dunlop Semtex, Nantyglo	1.41		Residential	
Former Dunlop Semtex building, Nantyglo	2.42	ASDA	Retail - Food	

BRIDGEND

Employment land developed between 2000 & 2005

Employment uses **Totals: 32.35 hectares, 1762 jobs**

	Size (Ha)	Occupiers	Use Class	Nos Employed
Abergarw Industrial Estate, Brynmenyn	2.08	Desilout-Portable Toilets Ltd, Holbrook Timberframe, LGA Ltd, Weddel Swift Distribution	B2, B8 (mainly B2)	127
Bridgend Ind Est	3.28	Bridgend College, Davies Hallell, Harman Motive, Roma Medical Aids, 4 units in St David's Close and other various small units	B2, B8 (mainly B2)	350
Brynmenyn Ind Est	4.09	Welsh Biofuels, Valewood Furniture, Comet Group plc, Dantaag Ltd, Days Health Care	B1, B2, B8 (mainly B2)	40
Coychurch Yard, (Dunraven Business Park)	0.68	Various small units	B1, B2, B8 (mainly B2)	20
Village Farm Road, Pyle	1.26	Pyle Enterprise Centre, Sale-crest Conservatories, Springfall Properties, Absolutely Fabulous, Welsh Bottle Gas, 9 units in Green Court.	B1, B2, B8 (mainly B2)	150
Land Adjacent to Ford, (Waterton Park)	13.30	Lidl Distribution	B8	85
Pencoed Triangle - (Bocam Park)	3.60	Clay Shaw Thomas, Field Group, Nike Design	B1	150
Brackla Ind Est	1.89	Principality House 3 units - 1 let to Dragon Laser	B1, B2 (50/50 approx)	40
Land South West of Sony Technology Park, Pencoed	2.17	Lloyds TSB and additional car parking area	B1	800

Other uses **Total 11.80 hectares**

Penllwyngwent Ind Est, Ogmore Vale	0.82	Bayliss Recovery, Civic Amenity Site	Sui generis	20
Heol Ty Gwyn	0.23	Trailer Store, Civic Amenity Site	Sui generis	0
Pencoed Triangle	nk	Mercedes Centre	Sui generis	nk
Land at Tondu	6.75		Residential	
Pencoed Triangle	4.00		Residential	

CAERPHILLY
Employment land developed between 2000 & 2005

Employment uses — **Totals: 11.88 hectares, 620 jobs**

	Size (Ha)	Occupiers	Use Class	Nos Employed
Plots 2, 4, 6 Bedwas House Industrial Estate, Bedwas	0.40	Various SMEs	B2	20
Plot 8 Bedwas House Industrial Estate	0.40	Various SMEs	B2	20
Tredomen Business Park, Ystrad Mynach	0.81	Tredomen Business Centre	B1	90
Oakdale	6.07	General Dynamics Aztec Assemblies Glass Solutions Wales Circo Duraglaze	B2	350 25 15 20 15
Dyffryn Meadows, Ystrad Mynach	1.78	Centerprise	B2	25
Western Ind. Estate, Caerphilly	0.40	Western House	B2	25
Rogerstone Park, Rogerstone	1.66	Part of RF Brookes development	B2	-
Croespenmaen Industrial Estate, Crumlin	0.36	Window manufacture and warehouse	B2	15

Other uses — **Total 12.24 hectares**

Northview terrace, Caerphilly	0.67		Offices	
Crossways Park, Caerphilly	2.75		Retail (mixed)	
Penallta Colliery, Ystrad Mynach	1.60		Residential	
Waterloo extension, Machen	3.04		nk	
Pontymister extension, Risca	2.21		nk	
Old British Gas depot, Blackwood	0.62		nk	
Land at Angel Lane, Aberbargoed	1.35		Road	

CARDIFF

Employment land developed between 2000 - 2005

Employment uses — **Totals: 44.02 hectares, 7750 jobs**

	Size (Ha)	Occupiers	Use Class	Nos Employed
Ocean Park, Splott (previously known as Nettlefold Road, ASW site, Neptune Park, Trident.)	4.38	Trade park units Offices include STV & Age Concern Financial & professional services Manufacturing Storehouse & distribution	A2, B1, B2 & B8	900
Fusion Point, Dumballs Road (previously known as Timber Float site).	0.70	Zurich Insurance call centre (Phase 1)	B1	600
Greenmeadows Springs, Tongwynlais (previously known as Woodstock).	0.60		B1	150
Southpoint Business Park, Tremorfa	7.20	30-40 companies including Sheffield Insulation, Cumins diesel, Tracksafe, Cibburio & JPM.	B8	300
Capital Business Park, Parkway, Trowbridge.	7.00	Llandaff Laminates, Cardiff Business Technology, Greenlight Products, Flintec and others.	B2 & B8	300
Cardiff Gate Business Park.	8.09	60 companies including The Number 118 118, HBOS, Scottish & Southern Energy, International Baccalaureate Organisation, Royal College of Nursing, Coca Cola.	B1	4000
Wentloog	1.20	Commercial vehicle dealership	B2	200
Pacific Business Park, Splott.	2.2 2.45	Western Mail & Echo (newspaper press facility & storage), Companies including Minerva (dental equipment and distribution)	B2 B8	150
Celtic Gateway, Ely Fields.	0.76	Companies including Cardiff Council Housing & Social Services, BT data centre & other offices.	B1	350
Callaghan Square (previously known as Bute Square).	0.12	Eversheds ING. & Allied Irish Bank.	B1	600 200
Rail freight terminal	9.32		B8	0

Other uses — **Total 41.82 hectares**

Cardiff Gate Business Park	3.72 1.1 0.2 0.11	Motorway service building Audi showrooms Orthodentic centre Architects office	Sui generis Sui generis D1 A2	
Roath Basin	1.96		Residential	
Pierhead West	1.25		Residential	
Quantock View	1.13		Residential	
Caxton Place	0.54		Residential	
Phoenix Brickworks	3.76		Residential	
Willowbrook	2.92		Residential	
Bute Street	0.10		Residential	
Prospect Place, Grangetown	4.77		Residential	
Memory Lane Cakes, Caerphilly Rd, Heath	0.90		Residential	
Marks and Spencer Distribution Centre, Croescardarn Road, Pentwyn	3.19		Residential	
Maes Y Coed Road, Heath	6.04		Residential	
Freight Liner Depot, Rover Way, Splott	0.85		Residential	
Victoria Wharf, Grangetown	1.10		Residential	
Dumballs Road, Butetown	8.30		Residential	

MERTHYR TYDFIL

Employment land developed between 2000 & 2005

Employment uses				**Total 10.85 hectares**
	Size (Ha)	**Occupiers**	**Use Class**	**Nos Employed**
Former Button Factory, Goatmill Rd	0.45	nk	B1 B2 B8	nk
Broadhall Site, Goatmill Rd	1.70	nk	B1 B2 B8	nk
Lower Plateau, Rhydycar	3.09	nk	B1	nk
Riverside Plateau, Rhydycar	2.44	nk	B1	nk
Former Gas Works, Abercanaid	0.36	nk	B1 B2 B8	nk
Stephens and George Site, Goatmill Rd	1.21	nk	B1 B2 B8	nk
Dragonparc, Abercanaid	1.60	nk	B1 B2 B8	nk

Other uses				**Total 3.38 hectares**
Willows South, Abercanaid	2.13		Residential	
Cyfarthfa Plateau	1.25		Residential	

MONMOUTHSHIRE

Employment land developed between 2000 & 2005

Employment uses				**Totals: 0.24 hectares, 10 jobs**
	Size (Ha)	**Occupiers**	**Use Class**	**Nos Employed**
South Woodside, Usk	0.19	nk	B2	nk
Severnbridge (Lodge Way), Caldicot	0.05	Hicks Logistics	B8	10

Other uses				**Total 1.15 hectares**
Beaufort Park (Thornwell (a)), Chepstow	0.50		Retail DIY	
Severnbridge (central), Caldicot	0.41		Retail DIY	
Thornwell (b), Chepstow	0.24		Residential	

NEWPORT

Employment land developed between 2000 - 2005

Employment uses — **Totals: 89.46 hectares, 3673 jobs**

	Size (Ha)	Occupiers	Use Class	Nos Employed
Imperial Park	0.80	Various at Imp. House Phase II	B1	60 *
Pill	0.32	Various at Kings Parade	B2	10 *
Newport Docks	21.20	Jewsons Dowds Transit Sims Metal St. Gobain Finn Forest Island Steel Severn Sands	B2	47 10 * 110 12 2 10 28
Rogerstone Business Pk	1.33	Dalziel Foods Cardiff Trucks Kind David Tyres	B2	14 30 20
Mill Street	0.20	Royal Mail	B2	160
Queensway Meadows	2.10	Emtec Yearntree	B2	6 20
Reevesland Industrial Estate	2.90	Bisley Office Equipment	B2	500
Orb Industrial Estate	1.30	C & C Windows Wastesavers Newport Printing	B2	28 60 20
Gwent Europark	42.30	Wilkinsons Tesco	B8	900 95
Cleppa Park	2.40	The Quadrant Cedar Court Acorn Recruitment	B1	200 * 50 * 60
Celtic Springs	3.10	HM Prison Service Integra Wales & West Utilities	B1	330 30 * 350
Nash	0.70	Abel Skip Hire	B2	10
Stephenson Street	2.00	Various at Asset Site	B2	15 *
Wern Industrial Estate	0.01	Avana Bakeries	B2	180 *
Langstone Business Park	1.40	Various at 24 Severn Various at Merlin House	B1	135 *
LG Site	2.70	Quinn Radiators	B2	110
George Street	0.20	Yell.com	B1	50
Corus Site	4.50	Tarmac	B2	11

* Estimated

Other uses — **Total 24.95 hectares**

Crindau Transco	10.46		Retail - Food	
Lysaghts Institute	3.00		Residential	
Gloucester Wharf	2.13		Residential	
Rodney Parade	3.15		Residential	
East Dock Road	6.21		Residential	

RCT
Employment land developed between 2000 & 2005

Employment uses				Totals: 27.42 hectares, 1901 jobs
	Size (Ha)	Occupiers	Use Class	Nos Employed
Nipa, Llantwit Fardre	1.35	Clariant chemical manufacture	B2	40
North of Travellers Rest, Abercynon	0.72	RCTCBC offices	B1	400
Parc Nantgarw- Heol Crochendy/Charnwood Court	4.54	Cadw, Brocatalist, Wasp, C Health & Safety Solutions, Drive, LTC	B1	216
Garth Isaf, Talbot Green	6.29	L'Oreal warehouse extension	B8	redistribution
Old Parish Road, Ynysybwl	0.14	Small businesses	B2	vacant
Ynysyplwm, Ely Meadow, Lantrisant	1.00	Maris Mediscience Company	B1	vacant
Porth Plaza	0.30	Business units (A4E, Princes Trust) and Media Technology Learning Centre	B1 D1	50
Moy Road IE, Taffs Well	0.05	M & M	B1	10
Treforest IE	0.39	SCT, FD Systems, Prototech, CSS1W, AggCC, VHS, PDR	B1	159
Fairway Court, Treforest	0.66	RCT, WAG, Black Horse, NHS Trust, Fire and Rescue, Police	B1	197
Garth Isaf, Talbot Green	2.06	hompson Broadband, M&M Medical, Sameday Couriers, Noahs Ark, Arian, Brian Harris, Caravan Masters	B1	94
Ely Valley IE	0.57	Cordia Healthcare, Model Tools, Merlins Castle Playcentre	B1	33
Llantrisant BP	0.93	Dialysis Centre, Serious Food Co	B1, B2, B8	44
Parc Eirin, Tonyrefail	0.28	AKG limited	B2	88
Navigation Park, Abercynon	0.56	Venture Wales	B1	111
Pontycynon IE, Abercynon	0.02	Garth Bakeries	B2	15
Lanelay Road IE	0.29	-	B1	vacant
Beeches IE, Coedcae Lane	0.13	Aidapt, Café/takeaway, Total Package Packaging	B1/B2	52
Maritime Offices	0.35	Pontypridd Mental Health Clinic	B1	12
Woodlands, adj Coedcae Lane IE	0.35	Vision Products	B1/B2	70
Oxford Street, Nantgarw	0.16	Welsh Water/ Amec	B1	37
Uni of Glamorgan, Treforest	0.30	University office block	B1	30
Maritime IE, Pontypridd	0.11	Royal Mail relocation	B1 B2	80
Garth Isaf, Talbot Green	0.60	Interserve, Diamond Centre for Wales	B1	17
Polikoff Site, Treherbert	0.53	Extension of adjacent manufacturing business	B2	vacant
Aberaman IE	0.78	Every White extension, District Energy, Showa Extension	B2	39
Gwaun Ely	1.66	Marks International Ltd, Technology in Motion	B1	43
Former E Glam Hospital Site, Church Village	1.70	Local Health Trust Offices	B1	40
Griffin Mill Garage Site, Upper Boat	0.60	JHP, Butter Young	B1	24

Other uses				Total 7.35 hectares
Hirwaun IE	0.66	Verdant waste collection & recycling	Sui generis	40
Vans Direct Coed Ely	0.75	Extension - Find It Fund It	B1 and Sui generis	100
Bryn Pica	2.00	Amgen Cymru, Encia Consulting (office & recycling facilities)	B1 & Sui generis	34
Llwyncelyn Road, Porth	0.23	Car Sales	Sui generis	3
Parc Nantgarw	0.27	Car Park	Sui generis	1
Upper Boat	1.79	Assembly Room	D1	
Porth Job Centre	0.05	Job centre	A2	61
Cadwallader's Yard, Llantwit Fardre	1.60		Residential	

TORFAEN
Employment land developed between 2000 & 2005

Employment uses				**TotalsL 11.83 hectares, 610 jobs**
	Size (Ha)	**Occupiers**	**Use Class**	**Nos Employed**
Gilchrist Thomas South, Blaenavan	0.87	17 Industrial Units	B1	55
Lower Mill (b), Pontypool	0.40	Eastern Valley Housing Office	B1	130
Pontyfelin Ave, Pontypool	2.82	Easibake Foods	B2	34
Llantarnam Park (c), Cwmbran	2.42	Office Development	B1	nk
Llantarnam Park (f)	0.80	Offices (Capita Gwent Consultancy)/ Warehouse (nk)	B1, B8	214
Llantarnam Park (g)	1.53	Electroservices	B1	20
Mamhilad Technology Park	2.42	Carlisle car components Ultrapharm	B2	80
Llantarnam Park (a)	0.57	Innovation centre	B1	77

Other uses				**Total 14.47 hectares**
Gilchrist Thomas north	0.40	Car park	sui generis	
Lower Mill (a)	0.89	Travel Lodge Hotel Harvester Restaurant	C1, A3	
Hepworth site, Cwmbran	1.50		residential	
Former canteen, Panteg Steelworks, Griffithstown	1.48		residential	
Former steelworks (north), Panteg	6.51		residential	
Welsh Water Depot, Llantarnam	3.36		residential	
Caldicot Way/ Avondale road, Cwmbran	0.33		residential	

VALE OF GLAMORGAN

Employment land developed between 2000 & 2005

Employment uses				**Totals: 3.31 hectares, 100 jobs**
	Size (Ha)	**Occupiers**	**Use Class**	**Nos Employed**
Cardiff International Airport Business Park	0.61	Alpha Catering	B2	30
Vale Business Park, Llandow	0.25	International Aerospace Asia (UK) Ltd	B8	6
Atlantic Trading Estate, Barry	1.05	J F Bowsher (joinery business)	B2	17
Atlantic Trading Estate	0.45	9 Units	B2	20
Atlantic Trading Estate	0.53	RDM Building Services	B8	10
Atlantic Trading Estate	0.42	Acorn Timber Mouldings (joinery business) APC (Plastics)	B2 B2	17

Other uses				**Total 14.67 hectares**
Llandough Trading Estate	0.77	Porsche main dealership	Sui generis	nk
Atlantic Trading Estate	2.00	SHS (scaffolding business) Vale of Glamorgan Waste Resource /Recycling Park	Sui generis Sui generis	nk
Cardiff International Airport Business Park	6.56	Car Park	Sui generis	nk
Cardiff International Airport Business Park	4.90	Hotel	C1	nk
Palmerston Trading Estate, Barry	0.44		housing	nk

APPENDIX 3

EMPLOYMENT CHANGES

3.1 Total workplace employment, local authorities in South East Wales.

3.2 Workplace employment by local authority, broad industry 2000 – 2004.

3.3 Changes in employment 2000 – 2005 : Total employee jobs.

3.4 Changes in employee jobs 2000 – 2005 by sector.

3.5 Changes in components of service sector employee jobs 2000 - 2005

TABLE 3.1

Total Workplace Employment, Local Authorities in South East Wales

(Note: numbers in thousands)

	2001	2002	2003	2004	2005	Change 2001 to 2005	
						Level	Percent
Blaenau Gwent	22	22	23	23	24	2	10%
Bridgend	56	55	56	58	57	1	2%
Caerphilly	56	56	56	54	56	0	0
Cardiff	185	192	188	195	191	6	3%
Merthyr Tydfil	22	20	23	20	20	-2	-8
Monmouthshire	42	40	44	43	44	2	6%
Newport	74	73	73	73	72	-1	-2%
Rhondda Cynon Taff	74	79	77	78	80	6	8%
Torfaen	35	34	35	36	36	2	4%
Vale of Glamorgan	40	38	39	40	43	3	9%
South East Wales	606	609	614	620	623	17	3%
Wales	1246	1260	1284	1295	1316	70	6%
United Kingdom	28382	28534	28720	28852	29039	657	2%

Source : Labour Force Survey, Annual Business Inquiry and Welsh Agriculture Census.

TABLE 3.2

Workplace Employment by Local Authority, Broad Industry 2001 - 2004

	Agriculture, Hunting, Forestry & Fishing				Production and Construction				Services			
	2001	2004	Level	%	2001	2004	Level	%	2001	2004	Level	%
Blaenau Gwent	-	100	100	100	8600	7400	- 1200	- 14	13300	15600	+ 2300	+ 17%
Bridgend	300	300	-	-	16500	15200	- 1300	- 8%	39000	42300	+ 3300	+ 8%
Caerphilly	200	200	-	-	19300	17500	- 1800	- 9%	36400	36200	- 200	- 1%
Cardiff	300	-	- 300	- 300	28600	26100	- 2500	- 9%	155600	168900	+ 13300	+ 9%
Merthyr Tydfil	-	-	-	-	6700	5100	- 1600	- 24%	14900	15100	+ 200	+ 1%
Monmouthshire	1300	1200	- 100	- 8%	7700	8300	+ 600	+ 8%	33000	33600	+ 600	+ 2%
Newport	400	200	- 200	- 50%	19000	15100	- 3900	- 21%	54100	58100	+ 4000	+ 7%
Rhondda Cynon Taff	200	400	+ 200	+ 100%	27400	22200	- 200	- 1%	51900	55200	+ 3300	+ 6%
Torfaen	100	100	-	-	10300	10400	+ 100	+ 1%	24400	25800	+ 1400	+ 6%
Vale of Glamorgan	800	900	+ 100	+ 12	7000	7900	+ 900	+ 13%	31900	31000	- 900	- 3%
South East Wales	3600	3400	- 200	- 6%	146100	135200	- 10900	- 7%	454500	481800	+ 27300	+ 6%
Wales	35700	35100	- 600	- 2%	289100	275300	- 13800	- 5%	921500	984300	+ 62800	+ 7%
United Kingdom	437000	421500	- 15500	- 4%	5804800	5352400	- 452400	- 8%	22,140400	23,071700	+ 937300	+ 4%

Sources: Welsh Assembly Government Stats Wales

TABLE 3.3

Changes in Employment 2000 - 2005: Total Employee Jobs

	2000	2005	CHANGE	
			Nos.	Percent
Blaenau Gwent	21300	19800	-1500	-7%
Bridgend	48300	55100	6800	14%
Caerphilly	48200	48600	400	1%
Cardiff	168300	194600	26300	16%
Merthyr Tydfil	17400	21700	4300	25%
Monmouthshire	32000	35600	3600	11%
Newport	71700	73000	1300	2%
Rhondda Cynon Taff	72500	78500	6000	8%
Torfaen	36100	34200	-1900	-5%
Vale of Glamorgan	42900	37800	-5100	-12%
South East Wales	558700	598900	40200	7%
Wales	1,080,300	1,190,000	109700	10%

Source: NOMIS Annual Business Enquiry Employee Analysis

TABLE 3.4

Changes in Employee Jobs 2000 - 2005 By Sector

	MANUFACTURING			CONSTRUCTION			SERVICE		
	2000	**2005**	**% Change**	**2000**	**2005**	**% Change**	**2000**	**2005**	**% Change**
Blaenau Gwent	7100	5200	-26%	1600	700	-56%	12500	13900	11%
Bridgend	11800	10200	-14%	1800	2400	33%	34400	42400	23%
Caerphilly	14900	12800	-14%	3400	2200	-35%	28700	33500	17%
Cardiff	15400	11100	-28%	7000	10900	56%	143600	171900	20%
Merthyr Tydfil	3600	4300	19%	1100	400	-63%	12600	16900	34%
Monmouthshire	4700	4400	-6%	1300	1300	-	25000	29700	19%
Newport	16400	11600	-29%	2500	1900	-24%	52600	59400	13%
Rhondda Cynon Taff	20200	15700	-22%	1900	3000	58%	49100	58900	20%
Torfaen	9900	7300	-26%	1300	800	-38%	24100	25900	5%
Vale of Glamorgan	5000	4100	-18%	2200	2300	5%	35000	30800	-12%
South East Wales	109000	86700	-20%	24100	25900	7%	418200	483300	16%
Wales	200600	168800	-16%	56900	55700	-2%	799500	945700	18%

Source: NOMIS Annual Business Enquiry Employee Analysis

TABLE 3.5

Changes in Components of Service Sector Employee Jobs 2000 - 2005

	TOURISM	DISTRIBUTION HOTELS & RESTAURANT	TRANSPORT & COMMUNICATION	BANKING, FINANCE & INSURANCE	PUBLIC ADMINISTRATION, EDUCATION & HEALTH	OTHER
Blaenau Gwent	-500 (-36%)	+300 (+7%)	+200 (+33%)	-600 (-33%)	+1500 (+32%)	0
Bridgend	+300 (+9%)	+1500 (+14%)	+200 (+12.5%)	+2500 (+58%)	+4100 (+27%)	-200 (-8%)
Caerphilly	+200 (+7%)	+100 (+1%)	+100 (+7%)	+400 (+8%)	+3600 (+36%)	+700 (+30%)
Cardiff	+2100 (+15%)	+3000 (+8.3%)	+4000 (+50%)	+10400 (+31%)	+8700 (+16%)	+2100 (16%)
Merthyr Tydfil	+700 (+88%)	+700 (+19%)	+800 (+160%)	-400 (-19%)	+2800 (+51%)	+300 (+33%)
Monmouth	-1000 (-28%)	+1400 (+17%)	+300 (+14%)	+1700 (+63%)	+1300 (+13%)	-100 (-5%)
Newport	-400 (-9%)	+1400 (+9%)	- 300 (-7%)	+800 (+6%)	+5000 (+30%)	-200 (-7%)
Rhondda Cynon Taff	+1200 (+34%)	+1900 (+14%)	+900 (+41%)	+1600 (+30%)	+4700 (+20%)	+700 (+17%)
Torfaen	-300 (-16%)	+100 (+1%)	0	+1000 (+55%)	+300 (+2%)	-300 (-19%)
Vale of Glamorgan	-200 (-4%)	-400 (-4%)	+400 (+25%)	0	- 3900 (-23%)	-300 (-12%)
South East Wales	+2100 (+5%)	+10000 (+8%)	+ 6600 (+28%)	+17400 (+24%)	+28100 (+17%)	+ 2700 (+8%)
Wales	0	36600 (+15%)	+ 7600 (+17%)	+32300 (+26%)	+61500 (+19%)	+8300(+15%)

Source: NOMIS Annual Business Enquiry