

# **LDP2** **Ceredigion**

## **Replacement Local Development**

## **Plan**

**2018 - 2033**

## **Ceredigion Employment Land Survey**

**2017 survey data, with commentary and analysis  
completed April 2019**

## **Ceredigion County Council**

The 2017 Employment Land Survey provides data from a desktop and site based review of all the allocated and non-allocated employment sites countywide above the threshold of 0.5ha.



Cyngor Sir  
**CEREDIGION**  
County Council

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# 1. Executive Summary

- 1.1.1 This report is the first whole scale survey of employment land that Ceredigion County Council has carried out. A comprehensive review of nationally published guidance and best practice was conducted and a site assessment methodology developed. The purpose of this review was to ensure the Employment Land Review was in conformity with Welsh Government planning guidance.
- 1.1.2 Its findings will form the Ceredigion data baseline for an updated analysis of economic needs and employment land requirement planned to be undertaken as part of the regional 'Larger Than Local' economic needs study with Carmarthenshire and Pembrokeshire.
- 1.1.3 In general terms, the evidence from the sites identified and surveyed at 2016 reflects the LDP1 expectations of economic growth and suggests that provision both in the amount of undeveloped land and in the evidence of churn on existing sites, is adequate to cope with likely development pressure. Countywide the survey identifies a total of 283.76 ha of employment land by use class and locality, comprising 221.39 ha of existing employment stock (developed), with a further 62.37 ha of undeveloped land committed for employment uses either by allocation or planning consent. The survey finds that the majority of employment land is of good quality in terms of internal and external site environment, accessibility (in a rural context) and absence of constraints.
- 1.1.4 There may be a need to consider in more detail whether potential additional land should be identified to reflect the Growing Mid Wales asset-based focus for Ceredigion's economic development going forward. An addendum sets the scene in this regard, summarising further or revised locations which need to be formally acknowledged in considering land allocations in preparation of the Deposit LDP2.

## 2. Introduction

- 2.1.1 This report is the first whole scale survey of employment land that Ceredigion County Council has carried out. In previous years surveys have been limited to those conducted on allocated sites in the UDP and LDP.
- 2.1.2 For the 2016 survey a comprehensive review of nationally published guidance and best practice was conducted and a site assessment methodology developed. The purpose of this review was to ensure the Employment Land Review was in conformity with Welsh Government planning guidance. In particular it was a reflection of the requirements of:
- Planning Policy Wales Edition 9 November 2016
  - Technical Advice Note 23 on Economic Development (2014); and
  - Practice Guidance on Building an Economic Evidence Base to support a local Plan (2015)
- 2.1.3 For the purposes of this report employment land uses are taken to include those in Use Class B1, B2, B8, A2 (office) and Unique uses that closely relate to B class uses. Other uses classes will also be discussed where they occur on identified employment sites.
- 2.1.4 The survey data is taken from the year 1<sup>st</sup> of April 2016 to 31<sup>st</sup> of March 2017. In recognition of the slow rate of change in employment land take up in Ceredigion, it has been determined appropriate to update the base data with information on relevant planning applications approved every 4 years but site surveys would only be completed as and when required.
- 2.1.5 This report represents the first analysis of the base data from the 2016/17 survey. Since the base date, a new edition of Planning Policy Wales (Ed 10) has been published at December 2018, but this has had no material impact on the methodology used for the survey, which is predominantly based on the Practice Guidance 2015 as quoted above.

- 2.1.6 The report will examine the quantitative and qualitative extent of allocated and non-allocated employment land and its distribution throughout the county, in terms of existing employment stock (developed) and committed sites (allocated or with planning permission).
- 2.1.7 In respect of potential sites, which are also to be considered in a comprehensive analysis, these are not part of the base data but are those identified primarily from economic development aspirations in the newly emerging strategy for Growing Mid Wales and from desk top review and Candidate Sites submissions to the Preferred Strategy for the replacement LDP. There may be further elements to consider arising from the emerging National Development Framework, which is due for publication in the summer of 2019. As such, potential sites are dealt with separately in the report insofar as information has emerged to date and will be dealt with by way of an addendum comprising a narrative and available data.

### 3. Methodology

- 3.1.1 The 2016 – 2017 Employment Land Survey covers:
- All Ceredigion County Council LDP Employment and Mixed Use allocated sites
  - Windfall employment sites of more than 0.5 ha in the County
  - All potential employment sites of over 0.5 ha in the count)
- 3.1.2 All allocated employment sites are listed in the LDP Volume 1 Appendix 6.
- 3.1.3 In order to draw up a list of all committed windfall sites in the county a variety of sources were used, namely the planning database, which was queried with reference to applications for and extensions to search terms relevant to B uses and office space. The annual Research and Information and Planning Policy retail and employment survey was queried for non-allocated sites entries. An officer working group was convened which considered various settlements and developed a list of potential sites. This working group included the Minerals and Waste officer who provided a list of relevant sites with the exception of quarries which were excluded from the analysis. The Environmental protection team also provided a list of potential sites.
- 3.1.4 All sites submitted were recorded in a database and considered, measured and assessed which resulted in a set of 63 Employment sites over 0.5ha. These sites were then circulated internally in Ceredigion County Council and were consulted on with the Sustainable Futures Executive Group of the Public Services Body for comment.
- 3.1.5 The database records the following information for all 62 sites:



<b>Field name</b>	<b>Data type</b>
New Site ID	integer
Employment_Site_ID	integer
Site_Name	text
LDP_Settlement_Group	text
LDP_2007_2022_Allocated_Site	True/false
LDP_2007_2002_Allocated_Site_Ref	alphanumeric
Alloc Site_Category	text
Use_Class	text
Site_Ha	Integer (2 decimal places)
Existing built ha	Integer (2 decimal places)
Undeveloped_Ha	Integer (2 decimal places)
Eastings      Northings	alphanumeric
Multiple use on site	True/false
Description of operations	text
Potential for other uses	True/false
S02- S04 policy compatibility	Text / List
Site survey required	True/ false
Site survey completed	True/ false

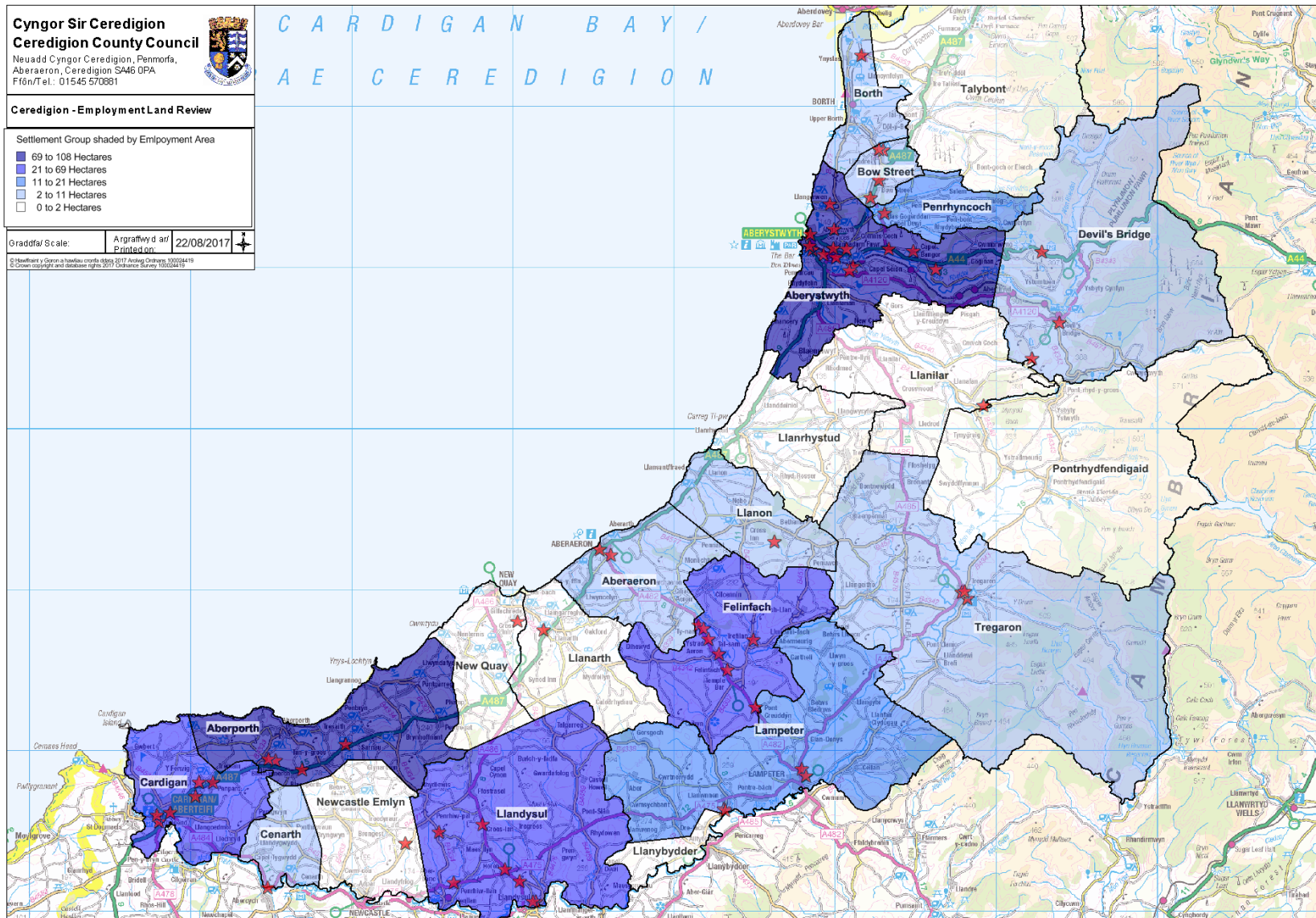
3.1.6 A further e-file created for each site holds aerial photography and site based photographs where relevant. Following entry in the database a desktop

appraisal was conducted for all sites in accordance with the following protocol:

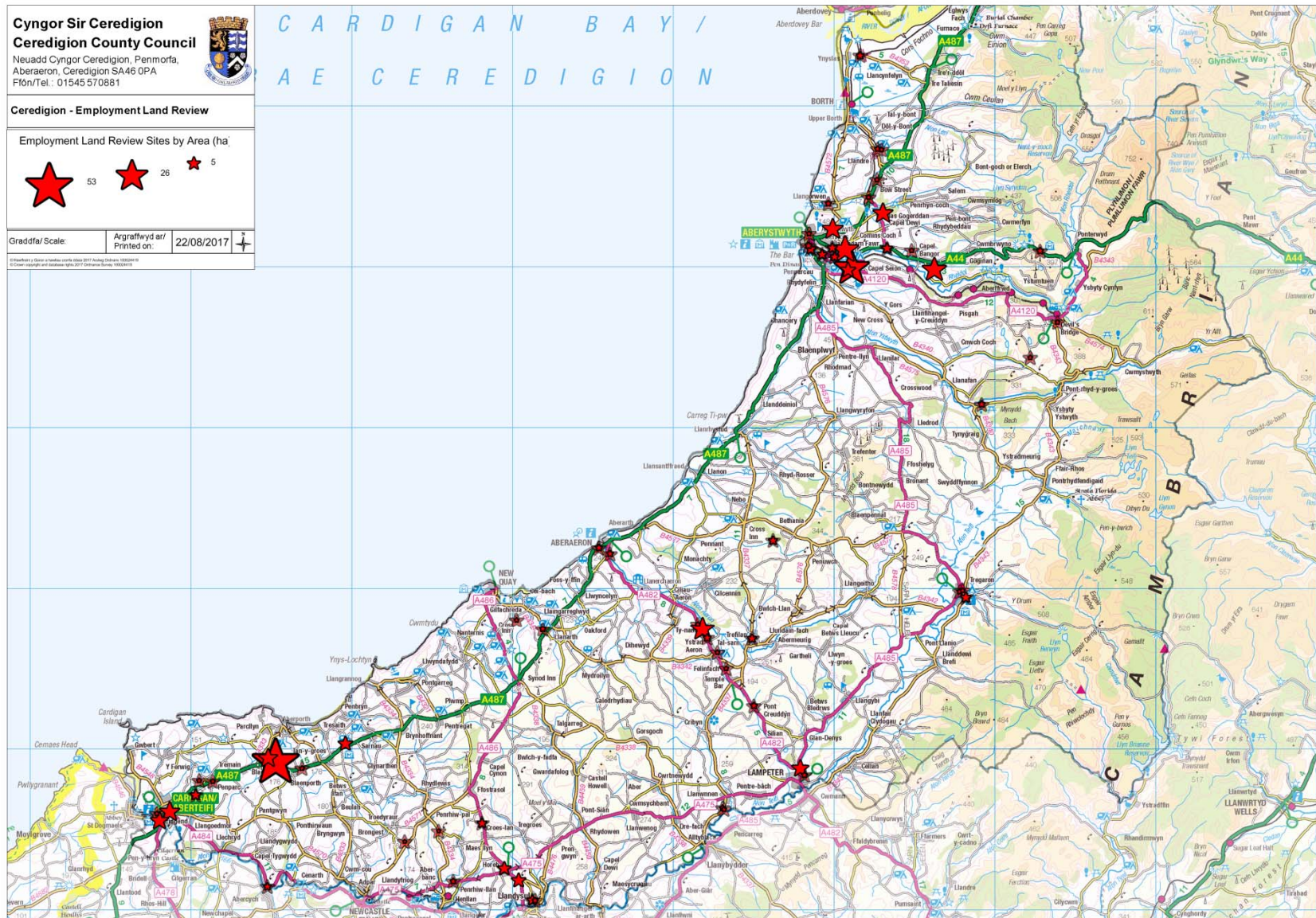
<b>Numbering and colour</b>	<b>Site Size</b>	<b>Action</b>	<b>Totals</b>
1	under 0.5ha	discounted from study	0
2	0.5ha to 3ha in size	Desktop exercise to establish if multiple businesses are present on site if so a survey will be conducted otherwise counted in the land supply and a desktop appraisal and file created but viability, and market attractiveness exercise etc not conducted as individual businesses which if shut or sold would likely only operate as that unit	35
4	3ha+	Site surveyed in full	6
5	Allocated Site	Site surveyed in full	21
Total			63

3.1.7 As a result of the filtering of sites through the desktop appraisal protocol a total of 46 sites were scheduled for a full site survey. The site survey consisted of a visit to the site and an assessment of the quantitative and qualitative features of the site in accordance with the site survey schedules see Appendix 1 for examples.

# Overview of Results and Comparative Analysis



# Employment Land Review Sites



## 4. Countywide Results

### Quantitative review of countywide employment land

#### 4.1 Land by Use class

4.1.1 Countywide there is 221.39ha of existing employment stock (developed), with a further 62.37 ha of undeveloped land committed for employment uses either by allocation or planning consent. Potential additional land is dealt with at the addendum to the report at page 52. The available land breaks down by use class to the following - where multiple uses exist on sites these have been categorised as such (historically categorised in this manner):

**Table 001: Ceredigion Total Employment Ha Countywide by Use Class**

Use Class	Existing Built Ha	Undeveloped Ha	Total Site Ha
A, B2, B8	0.99	0	0.99
B1	35.97	4.79	40.76
B1, B2	16.21	0	16.21
B1, B2, B8	51.73	35.68	87.41
B1, B2, B8, Unique	9.31	0	9.3
B1, B8	6.22	1.6	7.82
B1, Unique	3.24	0	3.24
B2	21.96	3.67	25.63
B2, B8	4.22	0	4.22
B2, B8, Unique	5.07	3.32	8.39
B8	10.93	0	10.93
D	4.62	2.52	7.14
Unique	50.93	10.79	61.72
<b>TOTALS</b>	<b>221.39</b>	<b>62.37</b>	<b>283.76</b>

4.1.2 Allocated sites account for the following hectarage of employment land countywide:

4.1.3 Non allocated sites account for the following hectarage of employment land countywide:

**Table 002a:Ceredigion Total Allocated Employment Ha Countywide by Use Class**

<b>Use Class</b>	<b>Existing Built Ha</b>	<b>Undeveloped Ha</b>	<b>Site Ha</b>
<b>B1</b>	19.44	4.79	24.23
<b>B1, B2</b>	16.21	0	16.21
<b>B1, B2, B8</b>	48.32	35.68	84
<b>B1, B2, B8, Unique</b>	9.31	0	9.31
<b>B1, B8</b>	4.83	1.6	6.43
<b>B1, Unique</b>	1.07	0	1.07
<b>B2</b>	0	3.67	3.67
<b>B2, B8</b>	2.34	0	2.34
<b>B2, B8, Unique</b>	5.07	3.32	8.39
<b>B8</b>	1.23	0	1.23
<b>Unique</b>	45.22	7.79	53.01
<b>TOTALS</b>	<b>153.04</b>	<b>56.85</b>	<b>209.89</b>

**Table 002b:Ceredigion Total Non-Allocated Employment Ha Countywide by Use Class**

<b>Use Class</b>	<b>Existing Built Ha</b>	<b>Undeveloped Ha</b>	<b>Total Site Ha</b>
<b>A, B2, B8</b>	0.99	0	0.99
<b>B1</b>	16.53	0	16.53
<b>B1, B2, B8</b>	3.41	0	3.41
<b>B1, B8</b>	1.39	0	1.39
<b>B1, Unique</b>	2.17	0	2.17
<b>B2</b>	21.96	0	21.96
<b>B2, B8</b>	1.88	0	1.88
<b>B8</b>	9.7	0	9.7
<b>D</b>	4.62	2.52	7.14
<b>Unique</b>	5.7	3	8.71
<b>TOTALS</b>	<b>68.35</b>	<b>5.52</b>	<b>73.88</b>

4.1.4 What these tables demonstrate is that if we amalgamate the primary use on site and concentrate specially at B1, B2, B8 and Unique uses we have the following amounts of employment land:

## 4.1.5 Countywide:

**Table 002c:Ceredigion Total Employment Ha Countywide by Primary Use Class**

	Primary Use of Site	Existing Built Ha	Undeveloped Ha	Totals
<b>Allocated Sites</b>	B1	99.18	42.07	141.25
	B2	7.41	6.99	14.4
	B8	1.23	0	1.23
	Unique	45.22	7.79	53.01
<b>Non-Allocated Sites</b>	B1	23.5	0	0
	B2	23.84	0	0
	B8	9.7	0	0
	Unique	5.7	3	8.71
<b>Totals</b>	<b>B1</b>	<b>122.68</b>	<b>42.07</b>	<b>141.25</b>
	<b>B2</b>	<b>31.25</b>	<b>6.99</b>	<b>14.4</b>
	<b>B8</b>	<b>9.7</b>	<b>0</b>	<b>1.23</b>
	<b>Unique</b>	<b>50.92</b>	<b>10.79</b>	<b>61.72</b>
<b>Existing and 'committed undeveloped' ha for B1,B2,B8 &amp; Unique industrial uses:</b>				<b>218.6</b>

**4.2 Units by Use class**

4.2.1 No m2 floorspace data by use class is consistently available in the Ceredigion datasets, nor are there any average ratios of m2 floorspace to site area ha by use class. Where units have been classified under a specific use class (and this is only the case for a small number of our sites, as only allocated sites in key settlements are regularly surveyed) the following results are relevant.



<b>Table 003 Employment units occupied and vacant by use class countywide (Site ha)(2017)</b>			
<b>Use Class</b>	<b>Site Ha</b>		<b>Total</b>
	<b>Occupied</b>	<b>Vacant</b>	
<b>A1</b>	4.38	0.28	4.66
<b>A1/B2</b>	0.05	0.00	0.05
<b>A2</b>	1.67	0.00	1.67
<b>A3</b>	0.04	0.00	0.04
<b>B1</b>	4.63	0.47	5.10
<b>B2</b>	10.08	0.28	10.36
<b>B8</b>	3.97	0.06	4.03
<b>C1</b>	0.11	0.00	0.11
<b>D1</b>	0.05	0.00	0.05
<b>D2</b>	0.23	0.00	0.23
<b>Unique</b>	1.37	0.00	1.37
<b>Total</b>	26.59	1.08	27.68

4.2.2 On allocated sites the totals are:

**Table 004 Employment units occupied and vacant by use class  
(Allocated Sites) (Site ha)(2017)**

Use Class	Site Ha		
	Occupied	Vacant	Total
<b>A1</b>	1.80	0.28	2.08
<b>A1/B2</b>	0.05	0.00	0.05
<b>A2</b>	0.12	0.00	0.12
<b>A3</b>	0.01	0.00	0.01
<b>B1</b>	3.47	0.47	3.93
<b>B2</b>	10.04	0.28	10.32
<b>B8</b>	3.59	0.06	3.65
<b>C1</b>	0.00	0.00	0.00
<b>D1</b>	0.03	0.00	0.03
<b>D2</b>	0.17	0.00	0.17
<b>Unique</b>	1.12	0.00	1.12
<b>Total</b>	20.39	1.08	21.47

4.2.3 The distribution of uses on allocated sites occurs over 241 employment unit sites, that is 87% of monitored sites. Table 004 indicates that only 5% by area of units on monitored allocated sites were vacant at 2017.

## 4.2.4 On non-allocated sites:

**Table 005 Employment units occupied and vacant by use class  
(Non-Allocated Sites) (Site ha)(2017)**

Use Class	Site Ha		
	Occupied	Vacant	Total
<b>A1</b>	2.58	0.00	2.58
<b>A1/B2</b>	0.00	0.00	0.00
<b>A2</b>	1.55	0.00	1.55
<b>A3</b>	0.03	0.00	0.03
<b>B1</b>	1.17	0.00	1.17
<b>B2</b>	0.04	0.00	0.04
<b>B8</b>	0.38	0.00	0.38
<b>C1</b>	0.11	0.00	0.11
<b>D1</b>	0.03	0.00	0.03
<b>D2</b>	0.06	0.00	0.06
<b>Unique</b>	0.26	0.00	0.26
<b>Total</b>	6.21	0.00	6.21

4.2.5 The distribution of uses on non-allocated sites occurs over 35 sites, that is, 13% of monitored sites. Non-allocated employment sites by their nature generally serve a specific company and demonstrate a nil vacancy rate.

4.2.6 Where the use class of units has been identified it is clear that these uses are primarily in the key employment land use areas of B1, B2 and B8. There is a high percentage of A1 use classes but this is because some large retail parks have been identified in the study due to their warehousing facilities. These are not traditional employment land, and so this is explained in the

site schedules. The county appears to have a large amount of B2 General industrial use but this may be as a result of two factors:

1. Poor classification of employment land during survey and
2. The generalised nature of industrial businesses on Ceredigion's employment parks.

4.2.7 The county has only one 'science park' intended for B1 occupiers, some of which have been filled with A2 and D1 use in an attempt to fill vacant units.

4.2.8 There were 46 vacant units at 2017, of which 41 were vacant in 2016, 32 vacant in 2015, 21 vacant in 2014, 28 vacant in 2013 and 26 vacant in 2011 (no survey 2012). This would indicate a relative reduction in market pressure for employment units between 2011 and 2017.

### 4.3 Multiple use/occupancy on site

4.3.1 The survey also considered whether the sites were dominated by one particular industry or whether they were operating on multiple industry types. As the results below demonstrate there is a 60:40 split towards multiple industry types.

4.3.2 Total hectares of land with multiple versus single uses/occupancy on site countywide:

4.3.3 Multiple:

#### 006 Total land countywide with multiple use/occupancy

Existing built ha	Undeveloped ha	Total ha
129.63	42.19	171.81

## 4.3.4 Single:

**007 Total land countywide with single use/occupancy**

Existing built ha	Undeveloped ha	Total ha
90.44	20.18	110.62

4.3.5 The survey also considered whether sites that were occupied at present had the potential for other uses and a significant amount of the available employment land, 156.76 ha has the potential for alternative employment use including 42.86 ha of undeveloped land.

**008 Total land countywide with potential flexibility of employment uses from current occupancy**

Existing built ha	Undeveloped ha	Total ha
113.9	42.86	156.76

**4.4 Employment land constrained by flooding**

4.4.1 The employment sites were assessed countywide for their flood risk and the amount of land constrained by flooding is set out below:

**009 Employment land constrained by flooding**

	Existing Built ha	Undeveloped ha	Total ha
Total C1	39.64	19.42	59.06
Total C2	53.03	13.97	67
Total Low/No risk	128.22	28.73	156.95
All Totals	220.89	62.12	283.01

4.4.2 **As the totals show, over 55% of employment land is without flooding constraints.**

## 4.5 Employment land by settlement hierarchy

4.5.1 The survey investigated how sustainably located the employment land was utilising the LDP's settlement classification as a guide. The results show;

### 010 Employment Land by Settlement Hierarchy

	Existing Built ha	Undeveloped ha	Total ha
Within USC/RSC	145.27	36.52	181.79
Adjacent USC/RSC	17.15	0	17.15
Linked Settlement or Other Location	1.93	22.01	23.94

4.5.2 As the table above demonstrates the majority of the employment land and available employment land is located within or adjoining a USC or RSC. And as the Employment Land review sites map provided earlier shows, they are largely connected by main 'A' roads, meaning they are sustainably located in a Ceredigion context. Those sites that are located in Linked Settlements and Other Locations tend to be rural specific industries such as saw mills and agricultural contractors and are often single use sites with little expectation of future re-use.

## 5. Qualitative factors affecting all surveyed countywide employment land

5.1.1 As directed by the Practice Guidance on Building an Economic Evidence Base to support a local Plan (2015) the surveying of the sites also considered qualitative factors. This included the quality of the environment and transport links associated with the site and whether the site had positive or negative adjoining uses.

### 5.2 Site quality

5.2.1 The sites considered to be of high quality were defined as follows:

5.2.2 Quality of the existing portfolio, internal and external environment\*

3	Buildings and external areas are of reasonable quality and condition providing an average range of building type and size / adequate provision of parking, circulation and servicing / quality of surrounding environment unlikely to significantly limit the attractiveness of the site for most users
4	Buildings and external areas are of good quality and condition providing a good range of building type, size and tenure / good provision of parking, circulation and servicing / quality of surrounding environment will likely be a positive factor to attracting occupiers

5.2.3 And the - Quality of the external site for most users of the environment

3	Quality / nature of surrounding environment unlikely to significantly limit the attractiveness
4	Quality / nature of surrounding environment will be a positive factor to attracting occupiers

**011 High Quality Employment ha**

<b>Existing Built</b>	<b>Undeveloped</b>	<b>Total</b>
143.28	39.82	183.09

5.2.4 The sites considered to be low quality were defined as follows:

**Quality of the existing portfolio, internal and external environment:**

1	Buildings and external areas are of very poor quality and condition / very restricted provision of parking, circulation and servicing / poor quality of surrounding environment
2	Buildings and external areas are of poor to moderate quality and condition / restricted provision of parking, circulation and servicing / quality of surrounding environment may limit the attractiveness of the site for certain users

**Quality of the external site for most users of the environment:**

1	Poor quality of surrounding environment
2	Quality / nature of surrounding environment may limit the attractiveness of the site for certain users

**012 Low Quality Employment ha**

<b>Existing Built</b>	<b>Undeveloped</b>	<b>Total</b>
13.90	5.84	19.74

5.2.5 It is positive for the future of employment sites in Ceredigion that the survey found 90% of surveyed sites to score 3 or 4 on the assessment, that is, high quality scores, as illustrated in Tables 011 and 012 above. Those sites scoring lower are predominantly older sites or sites with B2 or unique uses developed privately over time in more rural locations.



### 5.3 Amenity problems

5.3.1 The sites considered as being impacted by amenity issues are defined as follows:

#### Amenity Impacts (e.g. noise, dust & smell)

1	The site is substantially exposed to noise, dust and/or smell which significantly affects the quality of the immediate environment.
2	The site is exposed to some noise, dust or smell which somewhat affects the quality of the environment at certain periods of day.

#### 013 High Amenity Impacts Employment ha

Existing Built	Undeveloped	Total
58.67	12.32	70.99

5.3.2 The sites considered as not being impacted by amenity issues are defined as follows:

#### Amenity Impacts (e.g. noise, dust & smell)

3	Occasionally, the site appears to be exposed to some noise, dust or smell which can affect the amenity of the immediate environment.
4	The site does not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors

#### 014 Low Amenity Impacts Employment ha

Existing Built	Undeveloped	Total
162.22	46.38	208.6

5.3.3 Again it is positive that the majority of the surveyed employment land countywide does not appear to be impacted by amenity issues with 75% being considered as not being impacted by amenity issues.

## 5.4 Neighbouring Uses

5.4.1 The adjacent uses of a site can also impact upon its attractiveness to potential investors so they neighbouring uses were considered.

5.4.2 Those designated as having bad 'neighbours' were defined as such:

### Bad Adjoining Land use

1	The site is surrounded entirely by 'bad' neighbour uses and/or sensitive uses.
2	The site has some 'bad' neighbour uses' / or sensitive uses adjoining or within the site.

### 015 Bad Neighbouring Uses Employment ha

Existing Built	Undeveloped	Total
33	9	42

5.4.3 Those designated as having good 'neighbours' were defined as:

### Good Adjoining Land use

3	The site has little or no 'bad' neighbouring uses but has some potentially sensitive uses nearby.
4	The site is located in an area of other similar uses or open countryside.

### 016 Good Neighbouring Uses Employment ha

Existing Built	Undeveloped	Total
187.89	53.37	241.76

5.4.4 The results show that countywide only 15% of the available employment land has potentially off-putting neighbouring uses.

## 5.5 Accessibility

5.5.1 The proximity and visibility of employment land to main transport networks is also an important consideration for businesses wanting to locate to such sites and the general sustainability of the development. Therefore the site surveys considered how close to main transport links the sites were and how well screened or visible they were from these routes.

5.5.2 Those sites with visibility from main transport routes were defined as:

### Road Frontage Visibility

3	The site has some limited visibility to an 'A' Road / high visibility to a local road
4	The site has a highly visible frontage to an 'A' road

017 Visible from A Road Employment ha

Existing Built	Undeveloped	Total
184.26	45.44	229.7

5.5.3 The results indicate that approximately 80% of surveyed employment land countywide is located or is highly visible to an A road, this is a positive result and increases the long term sustainability of the sites. The map of employment sites in Appendix 2 clearly shows the location of employment sites and their clustering along (by Ceredigion's standards) major transport networks.

5.5.4 In order to establish what percentage of the countywide surveyed employment land is sustainably located and has good unconstrained access, the following criteria were used to consider it. Those sites which are easily accessed from an 'A' road, have good quality road access and have good quality site access were defined as:

**Ease of access to the strategic highway network (i.e. an 'A' Road)**

3	Located less than 1 kilometre away from a major arterial route but not immediately adjacent
4	Located immediately adjacent to major arterial route with easy accessibility to these routes

**Quality of local road access**

3	Surrounding roads are relatively wide / likely to be limited congestion at peak periods
4	Surrounding roads are wide / no apparent issues of congestion

**Quality of Site Access**

3	Likely to be only minimal site access (visibility constraints)
4	No apparent site access (visibility) constraints

**018 Good Access Routes Employment ha**

Existing Built	Undeveloped	Total
184.26	45.44	229.7

5.5.5 Given that Ceredigion is a predominantly rural authority with limited transport networks it is unsurprising that the majority of our employment land was unable to score highly across all measures of 'good accessibility'. Given the local highway network and the proliferation of B roads it is also not surprising that much of the employment land whilst being located visible from an A road also has issues with site access restricting some types of vehicle – for example, articulated vehicles trying to access smaller sites in Bow Street are constrained. Therefore having a quarter of our total employment land score highly across all surveyed elements of accessibility is a reasonably positive outcome for the county.

## Considering

### 5.6 Land based constraints

5.6.1 Other types of constraints such as landscape nature designations, listed buildings, ground contamination, can impact on the viability of employment land therefore the amount of unconstrained employment land is explored below:

5.6.2 Constraints have been categorised and are defined as set out below:

5.6.3 Environmental constraints and abnormal development requirements [e.g. landscape / nature conservation designations, heritage features (listed buildings and conservation areas), TPOs and identified development requirements / issues /constraints set out in Local Plan policies, site development briefs etc.] \*\*

3	The site is unlikely to be significantly constrained by environmental constraints / abnormal development requirements and these issues will likely only have a minimal impact on development potential.
4	There are no identified environmental or known abnormal development requirements applying to the site.

5.6.4 Physical site features (e.g. site size, shape, topography, pylons, drainage ditches and known underground utilities infrastructure dissecting the site) \*\*

3	may have some physical constraining features.
4	no apparent evidence of physical constraining features.

### Ground conditions/contamination \*\*

3	Likely to be only limited potential for contamination requiring minimal ground preparation and remediation works.
---	---

4	Contamination unlikely, no significant ground preparation works required.
---	---

### 019 Not Constrained Employment ha

Existing Built	Undeveloped	Total
183.85	30.04	213.89

5.6.5 Of the land assessed it is clear that 85% of countywide surveyed employment land is only partially constrained or is unconstrained, which is essential to ensure the continued viability of the sites.

## 6. Area Based Results

6.1.1 The LDP settlement strategy outlines the Urban Service Centres (USC) of Ceredigion. These are:

Aberystwyth

Cardigan

Lampeter

Llandysul

Tregaron

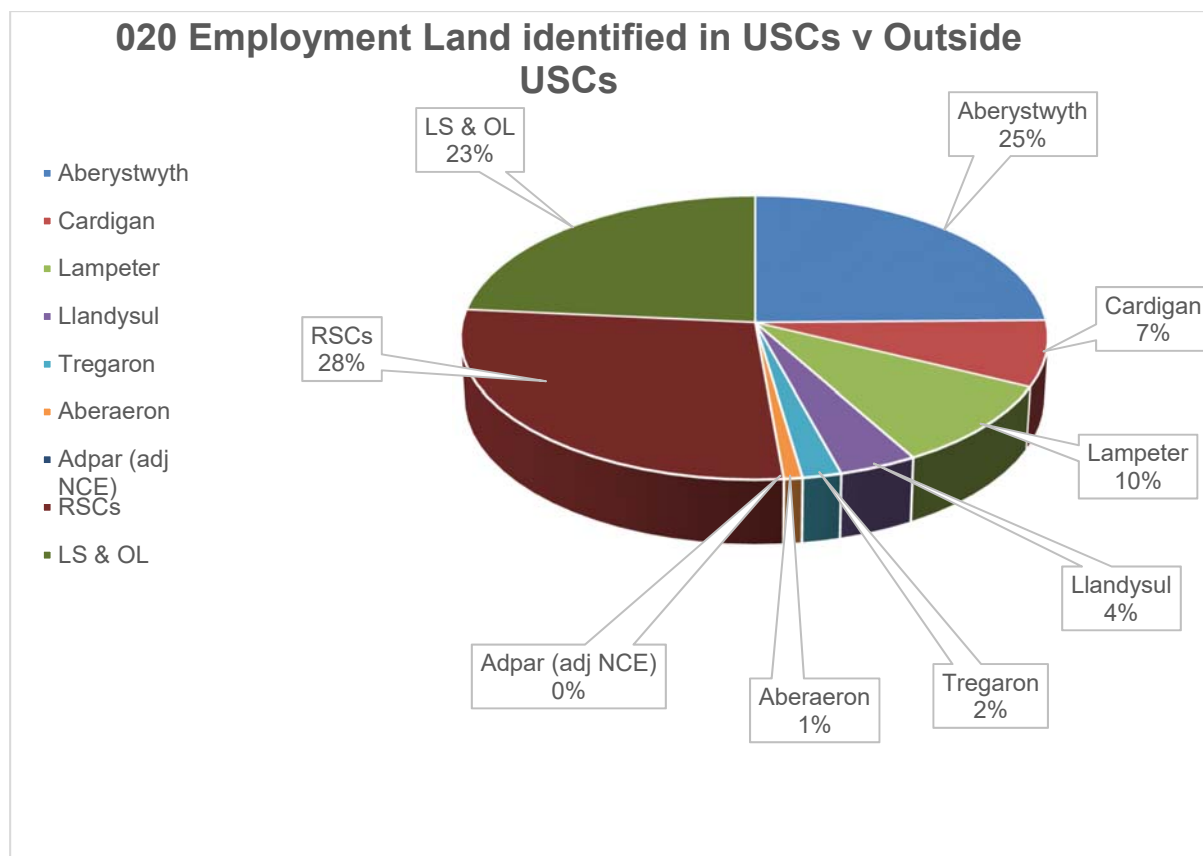
Aberaeron

Adpar (due to its proximity to Newcastle Emlyn)

6.1.2 Employment Land has been identified in the USCs as follows:

### 020 Employment Land identified in USCs v Outside USCs

USC	Amount of Employment Land (Ha)
Aberystwyth	70.2
Cardigan	21.26
Lampeter	27.31
Llandysul	11.05
Tregaron	5.49
Aberaeron	2.61
Adpar (due to its proximity to Newcastle Emlyn)	0.00
RSCs	79.11
LS & OL	66.73



6.1.3 The distribution of employment land demonstrates that the greatest opportunity lies in the most sustainable locations, with the largest share in the regionally important Aberystwyth.

6.1.4 The following sections outline the findings of the ELR by area - Urban Service Centre/ Rural Service Centre/ Other Location:



## 7. Aberystwyth

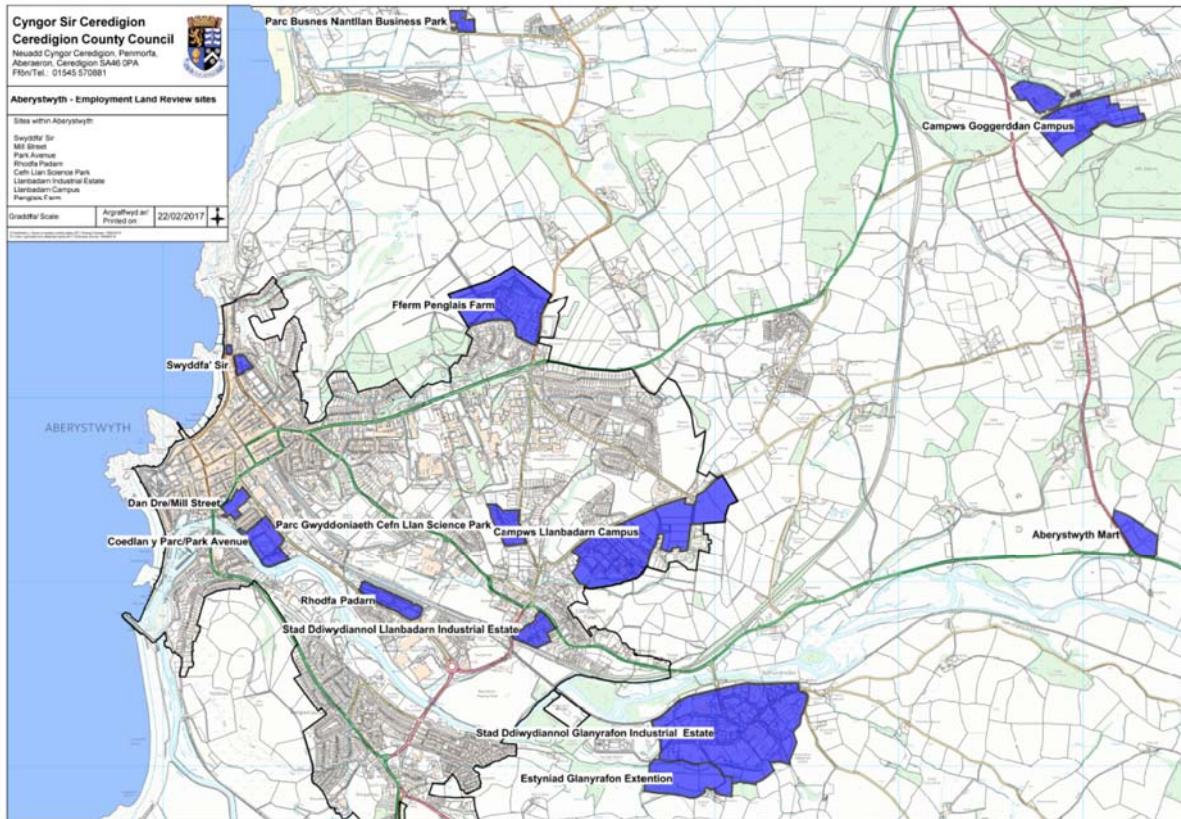
### 021 Aberystwyth USC

Amount of land available (Total Ha)	70.2
Amount of land by Use Class (Total Ha)	B1 (26.24); B1,B2, B8 (39.6); B2, B8 (2.34); B8 (1.23); Unique (0.79)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	14.33
Evidence of high churn or persistent vacancy	Of units vacant in 2017, under 50% vacant for 4 years or more back to 2011. Over 60% previously occupied by just one company
Amount of land unconstrained (by various factors)	On sites within the Aberystwyth USC 57.27ha are unconstrained, 9 ha of which are undeveloped

#### 7.1 Conclusions for USC / SG

7.1.1 In general the rate of development of allocated sites and the level of churn are within expected levels, as confirmed by the Annual Monitoring Reports. The permissive policy approach to economic developments appears to be adequate to provide for flexibility and 'local' demand. There has been no pressure for prestige development projects during the LDP1 monitoring period.

7.1.2 Map (PDF available in appendix 3)



## 8. Cardigan

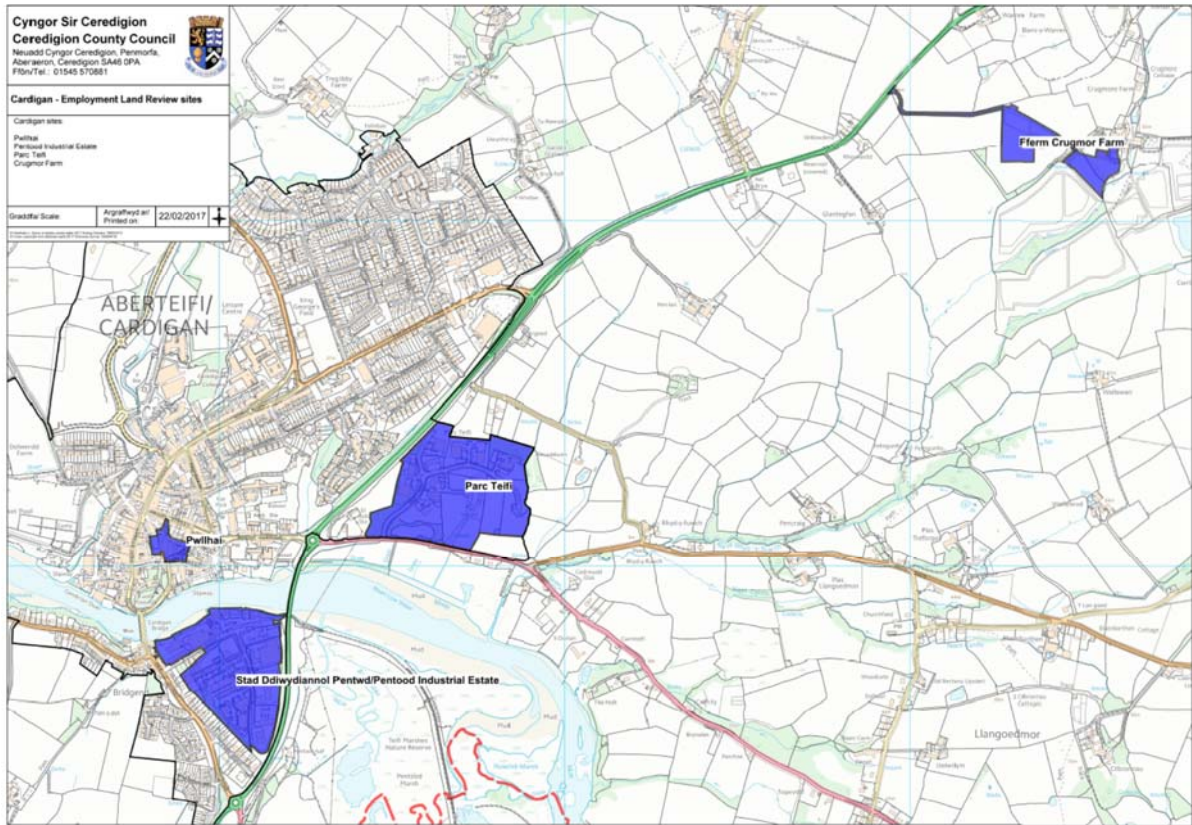
### 022 Cardigan USC

Amount of land available (Total Ha)	21.26
Amount of land by Use Class (Total Ha)	B1 (0.25); B1,B2,B8 (11.71); B1,B2,B8,Unique (9.3)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	3.65
Evidence of high churn or persistent vacancy	Of units vacant in 2017, 54% vacant for 4 years or more back to 2011. Over 70% previously occupied by just one company
Amount of land unconstrained (by various factors)	21.01

#### 8.1 Conclusions for USC / SG

8.1.1 Cardigan area has spare capacity both in terms of undeveloped land and in terms of vacancy rates in existing development. This is within the expectations of LDP1 as suggested by the Annual Monitoring Reports.

8.1.2 Map (PDF available in appendix 3)



## 9. Lampeter

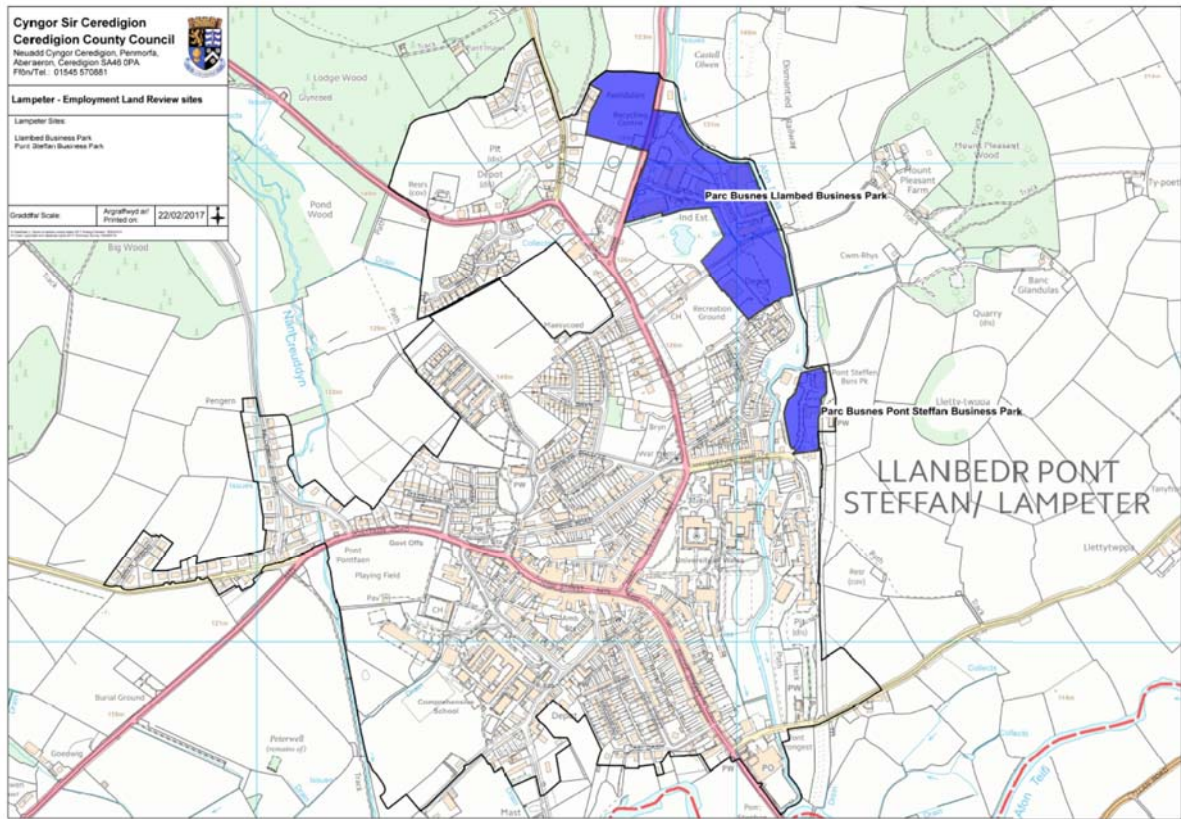
### 023 Lampeter USC

Amount of land available (Total Ha)	27.31
Amount of land by Use Class (Total Ha)	B1 (26.24); B1,B2, B8 (39.6); B2, B8 (2.34); B8 (1.23); Unique (0.79)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	9.96
Evidence of high churn or persistent vacancy	Of units vacant in 2017, 66% vacant for 6 years back to 2011. 34% previously occupied by more than one company
Amount of land unconstrained (by various factors)	8.39

#### 9.1 Conclusions for USC / SG

9.1.1 Lampeter has spare capacity both in terms of undeveloped land and in terms of vacancy rates in existing development. This is within the expectations of LDP1 as suggested by the Annual Monitoring Reports.

9.1.2 Map (PDF available in appendix 3)



## 10. Tregaron

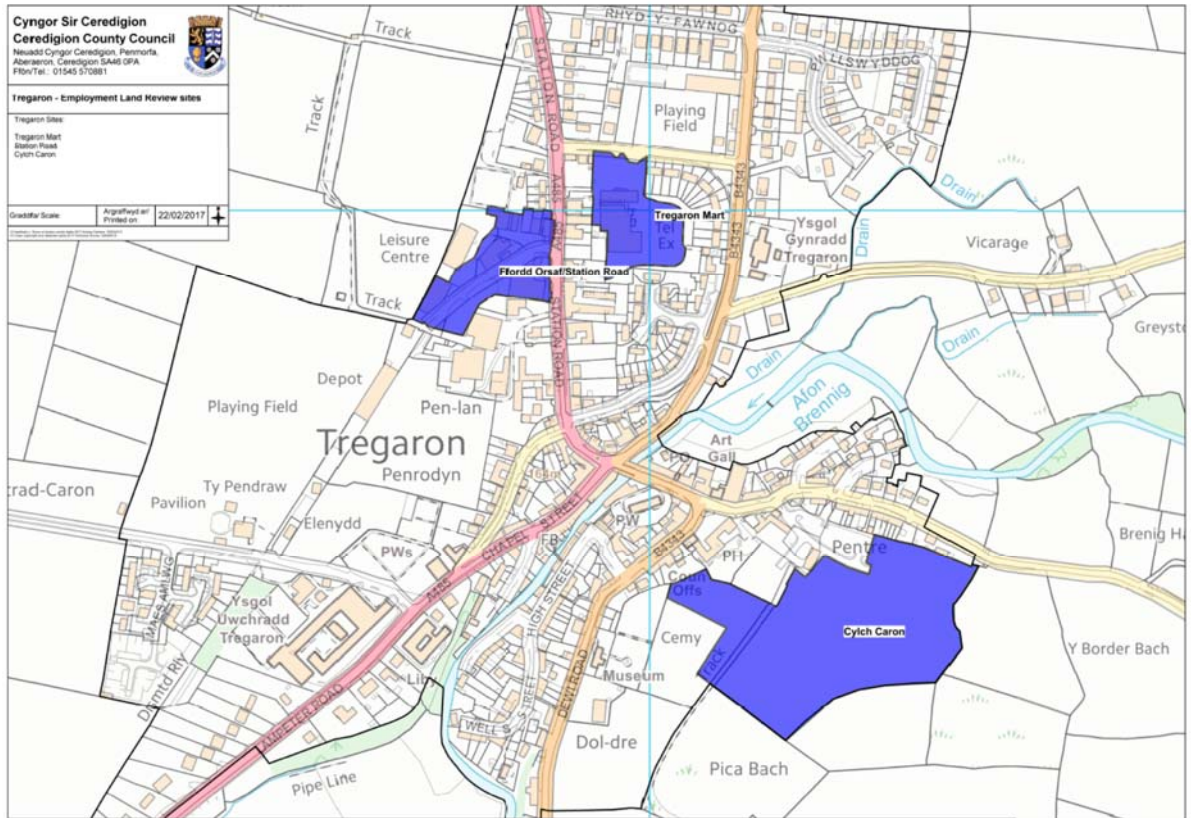
### 024 Tregaron USC

Amount of land available (Total Ha)	5.49
Amount of land by Use Class (Total Ha)	A, B2, B8 (0.99); Unique (0.83)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	3.67
Evidence of high churn or persistent vacancy	No units vacant at 2017/analysis not applicable
Amount of land unconstrained (by various factors)	1.82

#### 10.1 Conclusions for USC / SG

10.1.1 Tregaron has plenty of spare capacity in terms of undeveloped land, with very low market pressure, usually local in nature, in line with LDP1 expectations as suggested by the Annual Monitoring Reports. In funding terms the Cylch Caron project is the most significant potential development in Tregaron and benefits from planning consent.

10.1.2 Map (PDF available in appendix 3)





## 11. Llandysul

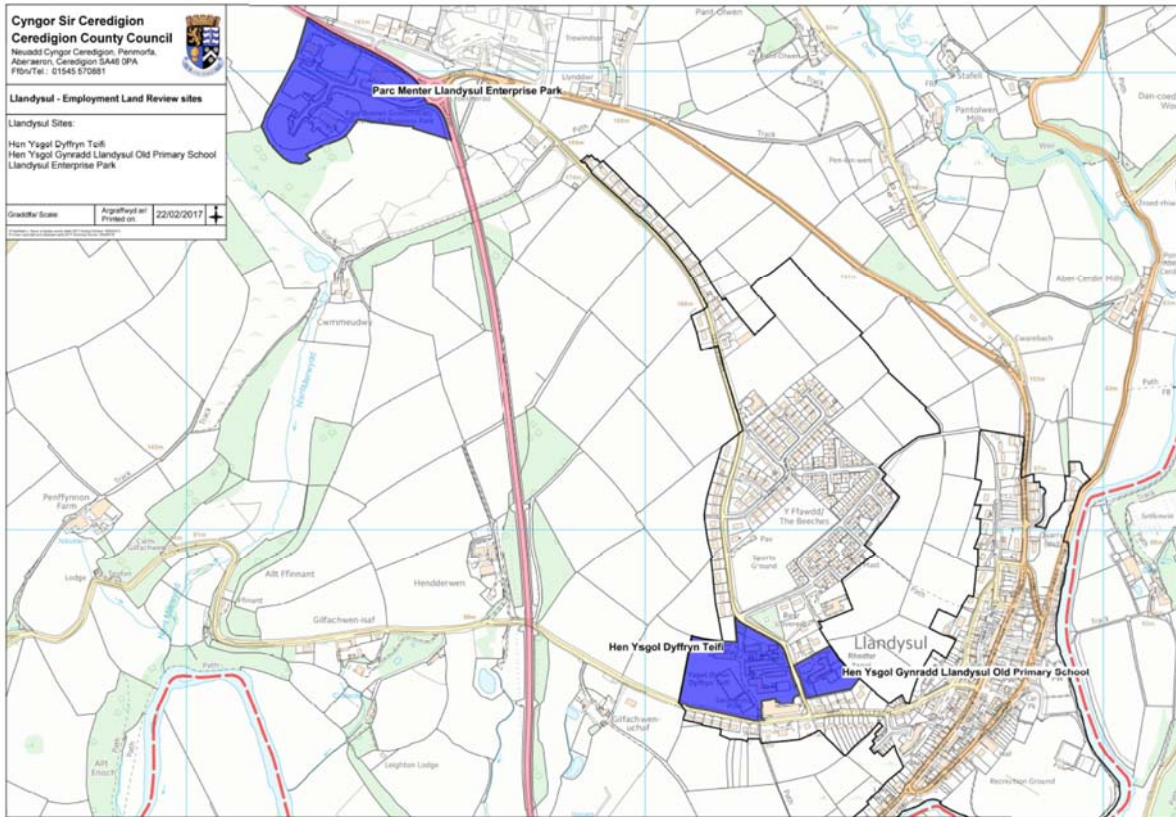
### 025 Llandysul USC

Amount of land available (Total Ha)	11.05
Amount of land by Use Class (Total Ha)	B1, B8 (4.83); D (4.62)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	1.6
Evidence of high churn or persistent vacancy	Of units vacant in 2017, 100% vacant for just 1 year previously back to 2011. Over 100% previously occupied by just one company
Amount of land unconstrained (by various factors)	10.11

#### 11.1 Conclusions for USC / SG

11.1.1 Llandysul has plenty of spare capacity both in terms of undeveloped land and in terms of vacancy rates in existing development. It benefits from high quality provision but suffers from low demand. This is within the expectations of LDP1 as suggested by the Annual Monitoring Reports. The nature of provision suggests that there may be scope to cater for growth of local companies/building on local skills in accordance with Growing Mid Wales strategic focus.

11.1.2 Map (PDF available in appendix 3)



## 12. Aberaeron

### 026 Aberaeron USC

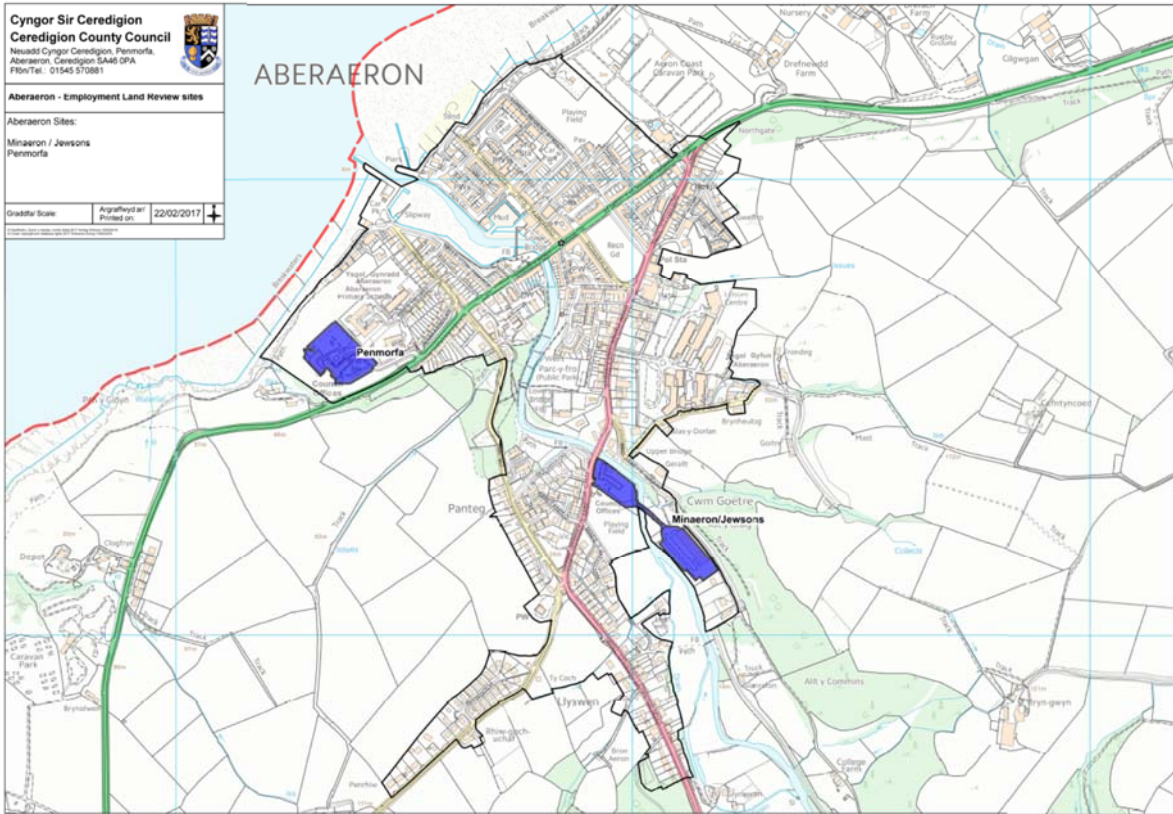
Amount of land available (Total Ha)	2.61
Amount of land by Use Class (Total Ha)	B1 (1.22) B1, B8 (1.39)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	0
Evidence of high churn or persistent vacancy	Nil
Amount of land unconstrained (by various factors)	0

#### 12.1 Conclusions for USC / SG

12.1.1 Aberaeron has no spare capacity and has considerable land constraints.

This is within the expectations of LDP1 as suggested by the Annual Monitoring Reports.

12.1.2 Map (PDF available in appendix 3)



## 13. Rural Service Centres

### 027 Rural Service Centres

Amount of land available (Total Ha)	79.11
Amount of land by Use Class (Total Ha)	B1, B2 (16.21);B1,B2, B8 10.68); Unique (52.22)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	10.2
Evidence of high churn or persistent vacancy	Of units vacant in 2017, 50% vacant for just 3 years and 50% vacant for 6 years previously back to 2011. 50% previously occupied by just one company.
Amount of land unconstrained (by various factors)	79.11

#### 13.1 Conclusions for USC / SG

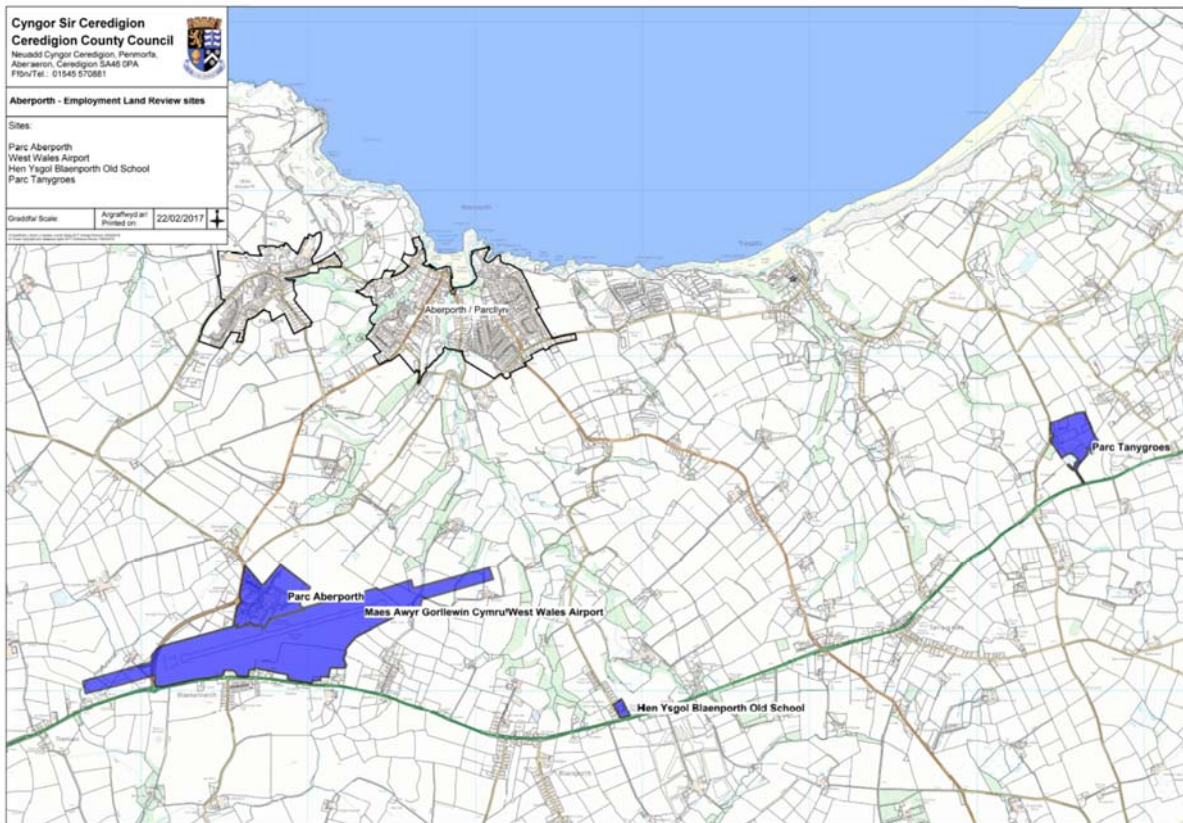
13.1.1 Land allocations outside the Urban Service Centres with the exception of Capel Bangor and Horeb reflect historic economic activity and assets. As such, these are generally adequate, with vacancy at some of these sites reflecting limited market pressure, in line with LDP1 expectations.

13.1.2 At Aberporth there is scope to acknowledge the role of Qinetiq (see Addendum on potential sites) to reflect the focus of Growing Mid Wales.

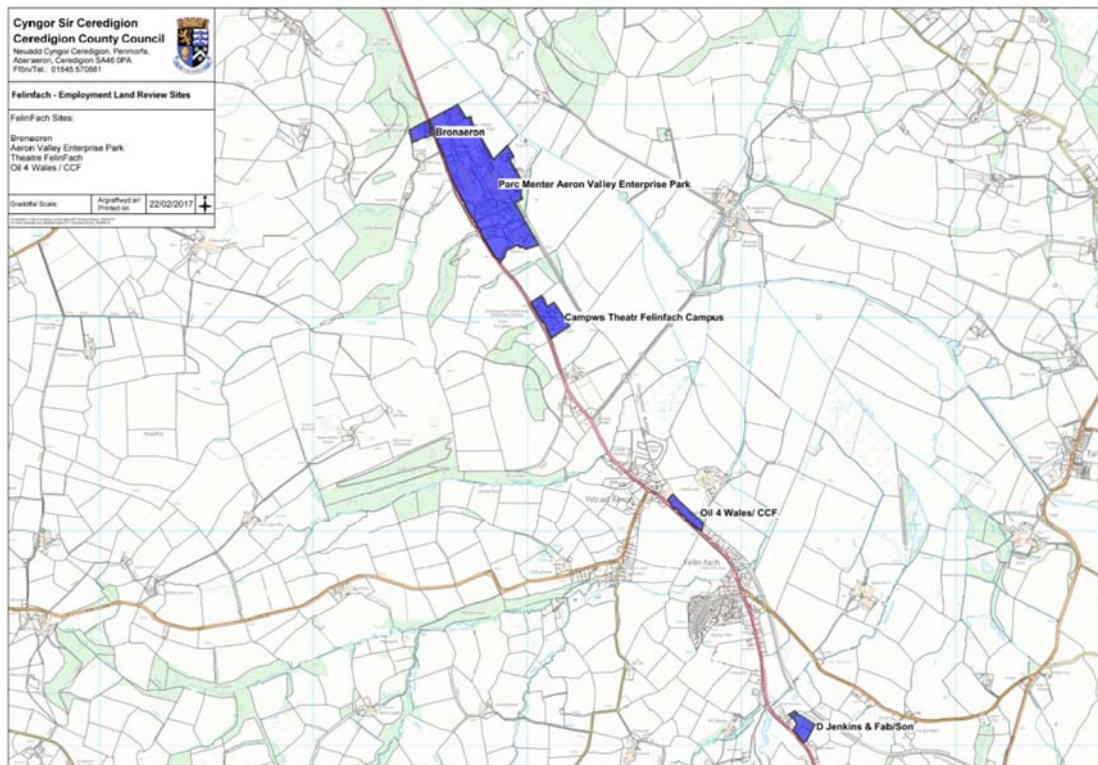
13.1.3 In respect of Capel Bangor and Horeb, see further entries.

13.1.4 Map (PDF available in appendix 3)

### Aberporth



### Felinfach



## 14. Linked settlements and other locations in Ceredigion County

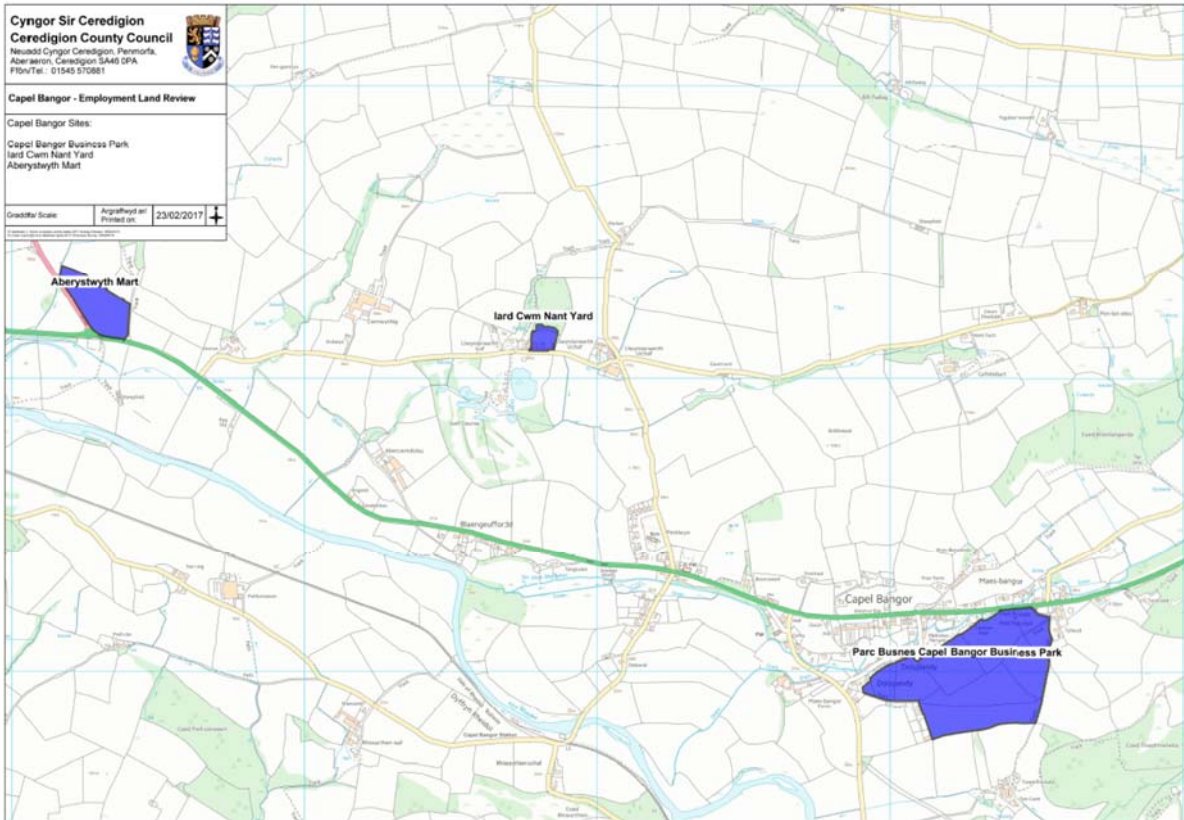
### 028 Linked Settlements

Amount of land available (Total Ha)	22.01
Amount of land by Use Class (Total Ha)	B1,B2, B8 (22.01)
Amount of potential land	Land identified as result of CS and 2019 brief review including GMW (not yet avail)
Amount of undeveloped land	20.08
Evidence of high churn or persistent vacancy	Of units vacant in 2017, 50% vacant for 2 years previously back to 2011 and 50% land allocation only for which outline consent lapsed. 50% previously occupied by just one company.
Amount of land unconstrained (by various factors)	Nil

#### 14.1.1 Map (PDF available in appendix 3)

### 14.2 Capel Bangor

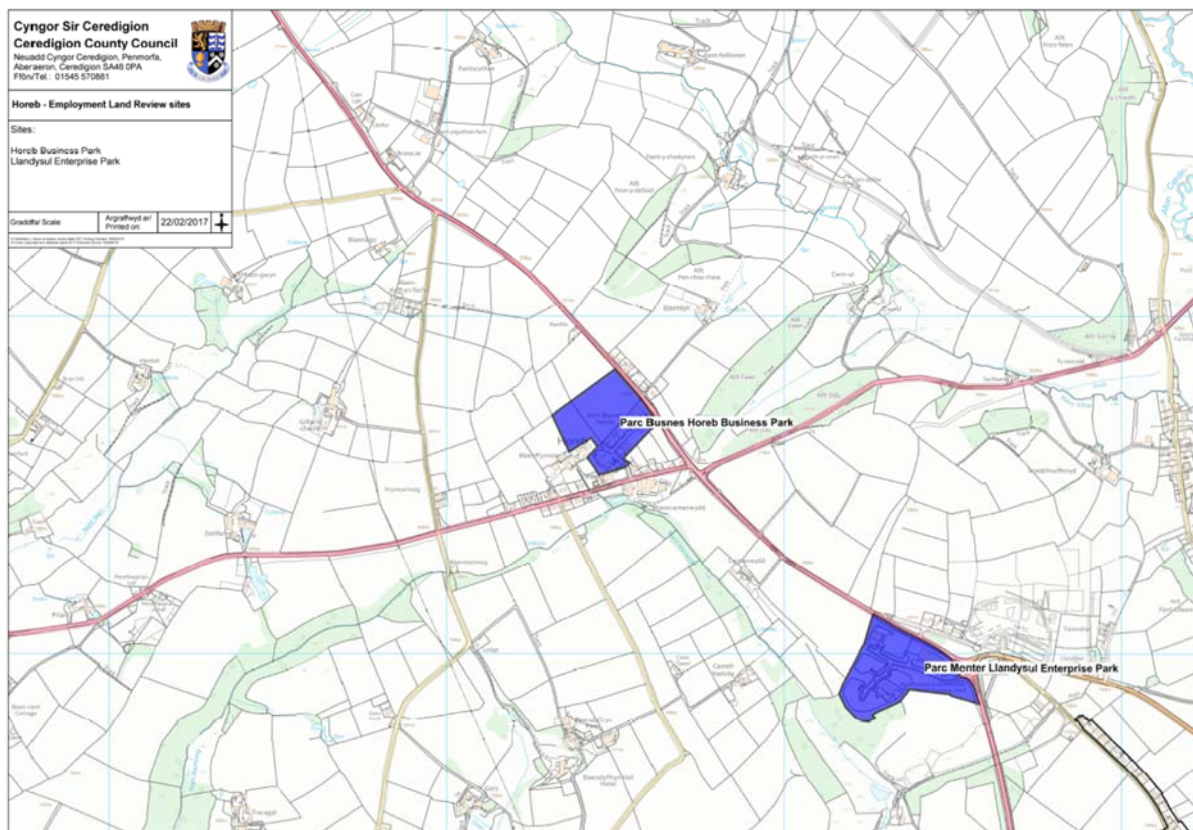
14.2.1 The absence of development at Capel Bangor and the lapse of planning permission there suggests that provision for prestige/B1/B8 development in the area based on an expectation of inward investment from footloose companies is potentially no longer appropriate, reflecting outmoded economic development policy models. The Growing Mid Wales focus on economic development strengths and existing assets is likely to require a review of the nature of employment allocations in the Settlement Group within or adjacent to those assets, predominantly the University of Aberystwyth campuses.





### 14.3 Horeb

14.3.1 There is scope for continued expansion at Horeb, in line with the ambitions in Growing Mid Wales’ focus on existing assets, i.e., Horeb Food Centre. Expansion of agri-environment ‘grow-on’ opportunity may require further land provision.



<b>029 Other locations Total county wide (Ha)</b>	<b>44.72</b>
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**15. List of all Sites appraised in the Employment Land Review**

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
Aberaeron	Minaeron/Jewsons	N			B1, B8	1.39	0	1.39	SA46 0DU	246050.54 42	262254.409 7
Aberaeron	Penmorfa	N			B1	1.22	0	1.22	SA46 0PA	245359.33 6	262619.265 3
Aber-porth/Parc-llyn	Maes Awyr Gorllewin Cymru/West Wales Airport	Y	M0801		Sui Generis	45.22	7	52.22	SA43 2AL	225240.48 82	249467.27
Blaenannerch	Parc Aberporth	Y	E0801	Prestige	B1, B2, B8	7.48	3.2	10.68	SA43 2DZ	224783.89 32	249562.552 7
Blaenporth	Hen Ysgol Blaenporth Old School	N			B1, Sui Generis	0.56	0	0.56	SA43 2BA	226877.65 23	248895.313 7
Tanygroes	Parc Tanygroes	N			B2	6.04	0	6.04	SA43 2JP	229596.85 7	250461.165 5
Aberteifi/Cardigan	Parc Teifi	Y	E0201	High Quality	B1, B2, B8	8.31	3.4	11.71	SA43 1EW	218665.82 7	246230.996 4
Aberteifi/Cardigan	Pwllhai	Y	M0201		B1	0.5	0.25	0.75	SA43 1DB	217857.27 51	246073.921 3
Aberteifi/Cardigan	Stad Ddiwydiannol Pentwd/Pentood Industrial Estate	Y	E0202	Local	B1, B2, B8, Sui Generis	9.31	0	9.3	SA43 3AD	218002.94 06	245668.317 4
Penparc	Cytiau Preswyl Kelsion Boarding Kennels	N			Sui Generis	0.6	0	0.61	SA43 1QR	220486.41 9	248118.586
Penparc	Fferm Crugmor Farm	N			B2	3.26	0	3.26	SA43 1RD	220270.76	247228.970

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
										12	7
Penparc	O C Davies ar Mab	N			Sui Generis	0.58	0	0.58	SA43 1SB	221340.06 31	248085.465 5
Aberystwyth	Campws Llanbadarn Campus	Y	M0305		B1	0	4.54	4.54	SY23 3AS	260672.56 64	281268.766 9
Aberystwyth	Coedlan y Parc/Park Avenue	Y	M0303		B1	3.67	0	3.67	SY23 1PG	258547.37 72	281217.151 7
Aberystwyth	Dan Dre/Mill Street	Y	M0302		B8	1.23	0	1.23	SY23 1JB	258394.50 55	281425.492
Aberystwyth	Fferm Penglais Farm	Y	M0306		B1	12.57	0	12.57	SY23 3FN	259887.40 58	282501.374 1
Aberystwyth	Rhodfa Padarn	N			B1	2.76	0	2.76	SY23 3UR	259235.97 17	280892.984 5
Aberystwyth	Swyddfa' Sir	Y	M0304		Sui Generis	0	0.79	0.79	SY23 2EG	258439.16 9	282173.028 1
Capel Bangor	Iard Cwm Nant Yard	N			B2, B8	0.68	0	0.68	SY23 3LL	264815.17 37	281138.794 1
Capel Bangor	Parc Busnes Capel Bangor Business Park	Y	E0305	Prestige	B1, B2, B8	0	16.88	16.88	SY23 3LT	266227.14 87	279991.972 4
Capel Dewi	Aberystwyth Mart	N			B8	3.15	0	3.15	SY23 3LL	263281.52 64	281257.030 3
Clarach	Parc Busnes Nantllan Business Park	N			B8	1.09	0	1.09	SY23 3DT	259626.11 15	284046.841 7
Llanbadarn Fawr	Parc Gwyddoniaeth Cefn Llan	Y	E0304	High Quality	B1	2.7	0	2.7	SY23 3AH	259866.71	281306.976

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
	Science Park									89	
Llanbadarn Fawr	Stad Ddiwydiannol Glanyrafon Industrial Estate	Y	E0302	Local	B1, B2, B8	30.6	1.75	32.35	SY23 3JQ	261077.34 95	280174.260 2
Llanbadarn Fawr	Estyniad Glanyrafon Extention	Y	E0301	Local	B1, B2, B8	0	7.25	7.25	SY23 3HJ	260851.31 94	279929.100 4
Llanbadarn Fawr	Stad Ddiwydiannol Llanbadarn Industrial Estate	Y	E0303	Neighbourhood	B2, B8	2.34	0	2.34	SY23 3RJ	260016.94 39	280736.659 2
Brongest	Maesffynnon	N			B1	0.54		0.54	SA38 9ER	233269.57 82	244326.871 4
Bow Street	Canolfan Adeiladu Build Centre	N			B8	0.82	0	0.82	SY24 5AT	262147.75 63	284436.670 1
Bow Street	Iard Ty Garn House Yard	N			B2	0.79	0	0.79	SY24 5AT	262668.84 41	285536.365 3
Llandre	Dan Glo	N			B1, B2, B8	0.65	0	0.65	SY24 5BY	262952.58 14	287409.419 2
Llandre	Tyn Parc	N			B2	1.15	0	1.15	SY24 5BU	262698.46 04	287449.597 7
Cross Inn	Felin Goed Bwlch Saw Mill	N			B2	0.75	0	0.75	SA44 6NW	240241.25 56	258142.366 8
Cenarth	Felin Goed James Davies Newbridge Sawmills	N			B2	1.89	0	1.89	SA38 9LA	224735.17 32	241555.804 6
Felinfach/Ystrad Aeron	D Jenkins & Fab/Son	N			B8	0.8	0	0.8	SA48 8BG	253283.20 25	255085.701 7
Felinfach/Ystrad	Oil 4 Wales/ CCF	N			B8	0.78	0	0.78	SA48 8AE	252738.30	256086.595

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
Aeron										29	2
Felin-fach/Ystrad Aeron	Bronaeron	N			B1	0.59	0	0.59	SA48 8AG	251502.31 05	257873.983 6
Felin-fach/Ystrad Aeron	Campws Theatr Felinfach Campus	N			B1, Sui Generis	1.61	0	1.61	SA48 8AF	252106.70 65	257000.913 5
Felin-fach/Ystrad Aeron	Parc Menter Aeron Valley Enterprise Park	Y	E1201	Local	B1, B2	16.21	0	16.21	SA48 8AG	251796.37 07	257629.143 7
Pont Creuddyn	Iard Sgrap Ivor Thomas Scrap Yard	N			B2	1.24	0	1.24	SA48 8BA	255000.85 49	252758.537 9
Talsarn	Storio a Dosbarthu Peter Jones and Sons Storage and Distrbution	N			B8	2.4	0	2.4	SA48 8QZ	254877.97 05	256959.885 3
Llanarth	Safle Site Penparc	N			B2	1.17	0	1.17	SA47 0NR	241858.30 17	257560.173 4
Llanbedr Pont Steffan/Lampeter	Parc Busnes Llambled Business Park	Y	E0501	Local	B2, B8, Sui Generis	5.07	3.32	8.39	SA48 8LT	257901.45 09	248932.733
Llanbedr Pont Steffan/Lampeter	Parc Busnes Pont Steffan Business Park	Y	E0502	Local	B1, Sui Generis	1.07	0	1.07	SA48 7HH	258143.86 39	248482.132
Llanwnnen	Concrit Teifi Concrete	N			B2	0.76	0	0.76	SA48 7JY	253137.99 05	246350.312 2
Llanwnnen	Parc Ddiwydiannol Glan Teifi Industrial Park	N			B2	1.19	0	1.19	SA48 7JY	253068.73 2	246428.279 9
Coedybryn	Hen Ysgol Coedybryn Old	N			D	0	2.52	2.52	SA44 5JL	235368.01	244995.829

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
	School									22	9
Ffostrasol	Depot Penrhos Depot	N			B1, B2, B8	2.76	0	2.76	SA44 4SJ	238073.62 9	245487.759 1
Horeb	Parc Busnes Horeb Business Park	Y	E0602	High Quality	B1, B2, B8	1.93	3.2	5.13	SA44 4JG	239469.11 38	242686.291
Llandysul	Hen Ysgol Dyffryn Teifi	N			D	3.68	0	3.68	SA44 4HU	241205.50 72	240695.520 9
Llandysul	Hen Ysgol Gynradd Llandysul Old Primary School	N			D	0.94	0	0.94	SA44 4HP	241396.99 05	240689.242 7
Llandysul	Parc Menter Llandysul Enterprise Park	Y	E0601	High Quality	B1, B8	4.83	1.6	6.43	SA44 4JL	240370.69 48	241958.179 4
Penrhiwllan	Parcau	N			B2	1.18	0	1.18	SA44 5NW	236288.17 75	241876.212 9
Llanafan	Felin Goed Riverside Saw Mill	N			Sui Generis	1.28	0	1.28	SY23 4BJ	269166.93 35	271563.485
Bethania	Dwr Ty Nant Water	N			B2	2.54	0	2.54	SY23 5LS	256201.09 67	263108.495 2
Penrhynoch	Campws Goggerddan Campus	N			B1	11.42	0	11.42	SY23 3EE	263035.95 55	283480.393 8
Llynwernog	Cambrian Fencing	N			B2, B8	1.2	0	1.2	SY23 3AB	272805.48 72	281097.545 9
Pontarfynach	Hen Safle Mart/Old Mart Site	N			B8	0.66	0	0.66	SY23 3JL	273897.60 32	276672.212 7
Trisant	Felin Goed Frongoch Saw Mills	N			Sui	0.77	3	3.77	SY23 4RL	272193.66	274475.091

Settlement	Site_Name	LDP 2007-2022 Allocated Site	LDP 2007- 2022 Allocated Site Ref	Site Category	Use Class	Existing Built Ha	Undevelo ped Ha	Site Ha	Post_Code	Eastings	Northings
					Generis					24	6
Tregaron	Cylch Caron	Y	M0701		B2	0	3.67	3.67	SY25 6JX	268186.34 83	259561.140 7
Tregaron	Ffordd Orsaf/Station Road	N			A, B2, B8	0.99	0	0.99	SY25 6HX	267827.96 03	259937.163
Tregaron	Tregaron Mart	N			Sui Generis	0.83	0	0.83	SY25 6HJ	267989.07 7	259995.286 4
Ynylas	Iard Gychod Leri Boatyard	N			Sui Generis	1.64	0	1.64	SY24 5LB	261606.74 84	293270.361 5
	Totals					221.39	62.37	283.76			

## 16. Addendum: Potential Sites

- 16.1.1 A 4 year review period for ELR in Ceredigion has been deemed appropriate and sustainable, given the relatively slow rate of change on employment land in Ceredigion. It is therefore considered sufficient to provide a simple interim headline review alongside this report analysis and commentary to identify further existing sites and potential sites.
- 16.1.2 The headline review has taken into account the emerging economic strategy for Growing Mid Wales and the Candidate Sites submissions to the invitation issued in preparation for the Ceredigion LDP2 Preferred Strategy in June-September 2018.
- 16.1.3 The priorities for Growing Mid Wales provide an inter-linked programme of activities that are required to deliver sustainable economic growth, more productive jobs and support prosperous communities in Mid Wales by 2033. The key features relate to natural, intellectual and innovation assets. Within Ceredigion, these are identified as:
- 16.1.4 **Tourism** – focus on harbours
- 16.1.5 **Manufacturing** – life sciences – e.g,
- Protherics, UK and
  - Aber Instruments
- 16.1.6 **Agriculture and land based economy** – R&D strengths of Aberystwyth University and Food Centre Wales, Horeb.
- Ceredigion's world leading research centres such as the Institute of Biological, Environmental and Rural Sciences (IBERS) has been identified as employment land in the 2017 survey.
  - Opportunities to further exploit the research strengths of the region's agri-tech and bioscience sector exist. An Agricultural Innovation Centre would help to develop new products and processes to facilitate farm



diversification, which may be possible adjacent to the Food Centre Wales, at Horeb.

- Mid Wales has existing strengths in veterinary science via the Wales Veterinary Science Centre and the £4.2m Vet Hub development. The proposed location for this hub should be incorporated in employment land allocations. An Animal Health Campus would promote innovation and address critical skills shortages within this vitally important agricultural sector.

**16.1.7 Defence and security** – pioneering defence related activity with segregated airspace for Remotely Piloted Aircraft Systems.

- (Qinetiq, Aberporth). Radio Spectrum – Ceredigion is an important location for UK defence operations, offering segregated airspace for Remotely Piloted Aircraft Systems (RPAS) off the coast of West Wales. A National Spectrum Innovation, Engineering and Experimentation Centre (N-SIEEC) offers the potential to promote innovation, develop new product and applications, supporting resilience, integrity and security to place Mid Wales at the centre of UK Government's Spectrum Strategy.

**16.1.8** Whilst it is inappropriate to define or allocate Ceredigion's harbours as employment land, the ambitions identified in the GMW strategy suggest that sites associated with existing assets should be considered in addition to the sites surveyed in 2017.

## **16.2 Candidate Sites exercise**

**16.2.1** The Candidate Sites invitation exercise undertaken from June-September 2018 generated submissions in respect of employment land, though the quality of information provided and the number of sites was relatively limited. Given the range of sites named in the Growing Mid Wales literature, the response to the Candidate Sites invitation is disappointing. There will be a further invitation to submit Candidate Sites alongside the publication of the

Preferred Strategy for LDP2 in July 2019. The sites identified for employment allocation to date are as follows:

**Candidate Sites located in USCs/RSCs**

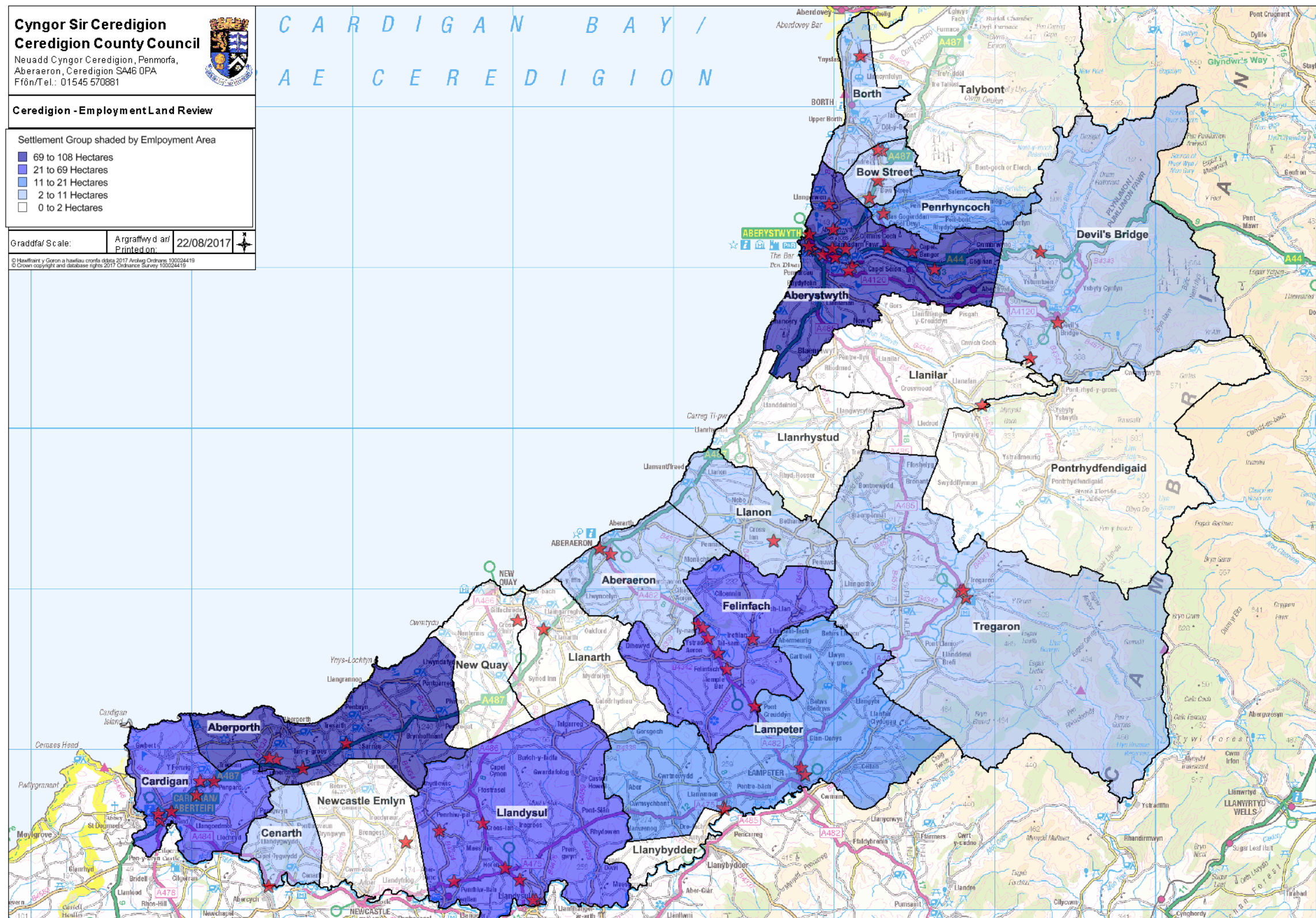
<b>Nearest LDP2 Settlement</b>	<b>S_ID</b>	<b>Maillist ID</b>	<b>Name Location</b>	<b>OS Ref</b>	<b>Area Ha</b>	<b>Existing Use</b>	<b>Proposed Use</b>	<b>Existing Allocated Site</b>
Llannarth - RSC	126	466	land forming part of Wenfron	SN 427 574	1.94	Agri, Garden	Unsure, Employment, Mixed, Housing, Tourism,	Na/No
Aberteifi/Cardigan - USC	20	387	Troedyrhiw	SN 179 451	0.74	Agri	Employment, Mixed, Housing, Tourism	Na/No
Aberystwyth/Llanbadarn Fawr/Waunfawr/Penparcau/Comins-coch/Rhydyfelin - USC	137	473	Parc Llety Gwyn	SN 601 805	3.41	Open Space/Recreation	Other, Employment, Retail	Na/No
Aberystwyth/Llanbadarn Fawr/Waunfawr/Penparcau/Comins-coch/Rhydyfelin - USC	140	475	E0301 Ymestyn Stad Ddiwydiannol	SN 615 800	9.99	Agri, Employ/Retail	Employment, Retail	E0301

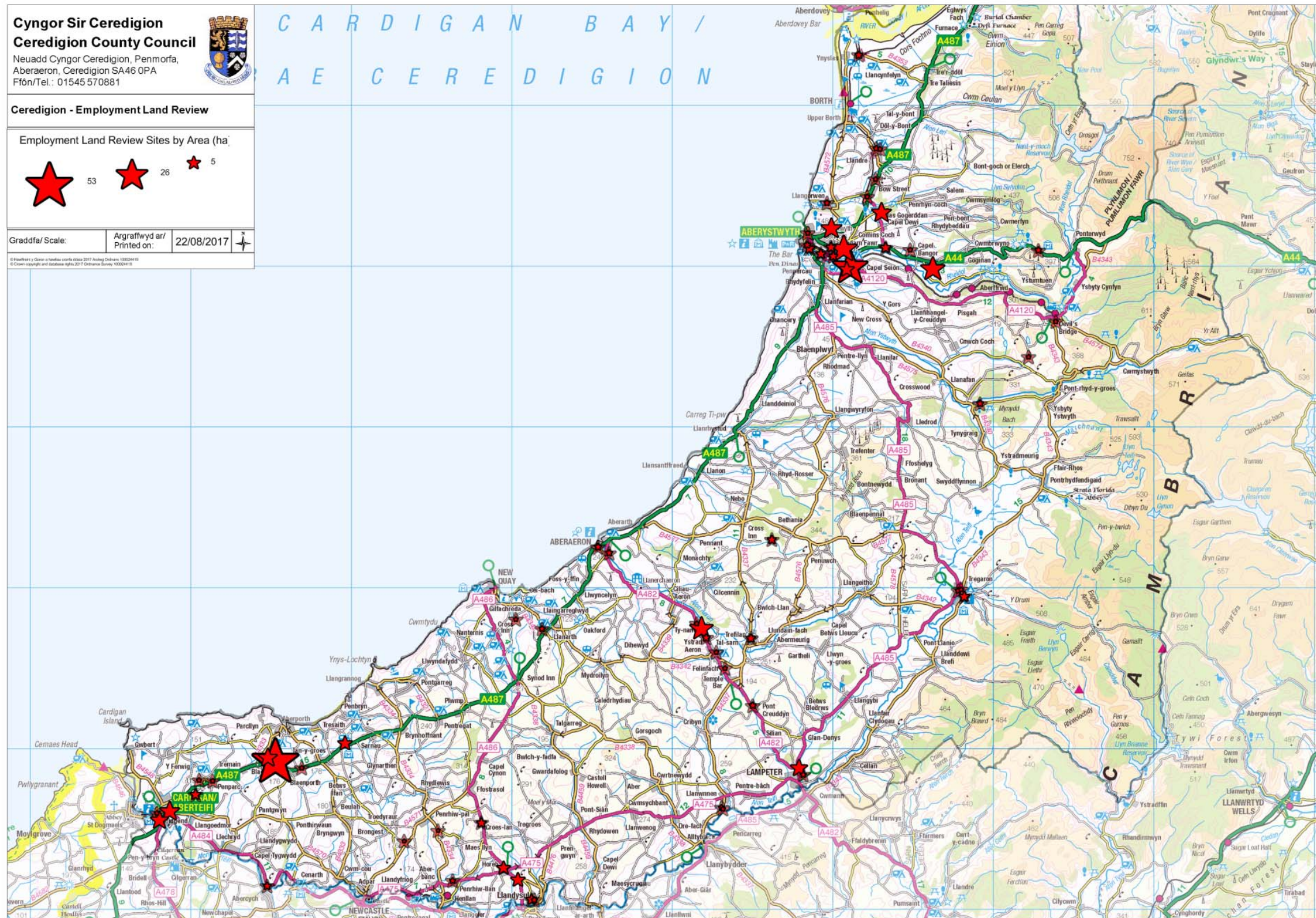
			Glanyrafon & est					
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### Candidate Sites located outside Service Centres

Nearest LDP2 Settlement	S ID	Maillist ID	Name Location	OS Ref	Area Ha	Existing Use	Proposed Use
Horeb - LS	65	420	land adj Llandysul Enterprise Park	SN 400 421	5.39	Agri	Employment, Retail, Housing,
Rhydlewis - LS	165	494	field opposite Pandy	SN 345 481	2.29	Agri	Unsure Employment, Mixed, Open Space, Retail, Housing, Tourism, Renewable Energy
Llanfarian - LLS	29	393	Royal Oak Garage	SN 589 776	0.24	Employ/Retail, Other	Unsure, Employment, Housing,

# 17. Appendix 1 Countywide Maps





## 18. Appendix 2 site survey schedule and notes sheet

### Qualitative Employment Land review

#### Market Attractiveness Assessment Criteria

Appraisal criteria	Indicator	Score	Scoring criteria
Quality of Existing Portfolio and Internal Environment	Quality of the existing portfolio, internal and external environment*	1	Buildings and external areas are of very poor quality and condition / very restricted provision of parking, circulation and servicing / poor quality of surrounding environment
		2	Buildings and external areas are of poor to moderate quality and condition / restricted provision of parking, circulation and servicing / quality of surrounding environment may limit the attractiveness of the site for certain users
		3	Buildings and external areas are of reasonable quality and condition providing an average range of building type and size / adequate provision of parking, circulation and servicing / quality of surrounding environment unlikely to significantly limit the attractiveness of the site for most users
		4	Buildings and external areas are of good quality and condition providing a good range of building type, size and tenure / good

			provision of parking, circulation and servicing / quality of surrounding environment will likely be a positive factor to attracting occupiers
Quality of the external site for most users of the environment	1		Poor quality of surrounding environment
	2		Quality / nature of surrounding environment may limit the attractiveness of the site for certain users
	3		Quality / nature of surrounding environment unlikely to significantly limit the attractiveness
	4		Quality / nature of surrounding environment will be a positive factor to attracting occupiers
Amenity Impacts (e.g. noise, dust & smell)	1		The site is substantially exposed to noise, dust and/or smell which significantly affects the quality of the immediate environment.
	2		The site is exposed to some noise, dust or smell which somewhat affects the quality of the environment at certain periods of day
	3		Occasionally, the site appears to be exposed to some noise, dust or smell which can affect the amenity of the immediate environment.
	4		The site does not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors



Quality of the wider environment	Adjoining Land use	1	The site is surrounded entirely by 'bad' neighbour uses and/or sensitive uses
		2	The site has some 'bad' neighbour uses' / or sensitive uses adjoining or within the site
		3	The site has little or no 'bad' neighbouring uses but has some potentially sensitive uses nearby
		4	The site is located in an area of other similar uses or open countryside
	Road Frontage Visibility	1	The site is not visible from any road frontage
		2	The site has some visibility to a local road
		3	The site has some limited visibility to an 'A' Road / high visibility to a local road
		4	The site has a highly visible frontage to an 'A' road
Highway Accessibility	Ease of access to the strategic highway network (i.e. an 'A' Road)	1	Located more than 2 kilometres away from a major arterial route
		2	Located 1 - 2 kilometres away from major arterial route
		3	Located less than 1 kilometre away from a major arterial route but not immediately adjacent
		4	Located immediately adjacent to major arterial route with easy

Market Conditions / Perception of Demand	Quality of local road access		accessibility to these routes
		1	Very narrow surrounding roads potentially unadopted / heavy congestion at most periods
		2	Width of surrounding roads could create potential issues for HGV access / potential for heavy congestion at peak periods
		3	Surrounding roads are relatively wide / likely to be limited congestion at peak periods
	4	Surrounding roads are wide / no apparent issues of congestion	
	Quality of Site Access	1	Significant site access (visibility) constraints / possible 'ransom' issues
		2	Possible site access (visibility) constraints, including for larger commercial vehicles, which could constrain development
		3	Likely to be only minimal site access (visibility constraints)
		4	No apparent site access (visibility) constraints
	Duration of availability **	1	Site has been available (e.g. allocated in LDP / UDP) for more than 10 years
2		Site has been available (e.g. allocated in LDP / UDP) for 6 – 10	

			years
		3	Site has been available (e.g. allocated or committed) for 2 – 5 years
		4	Site has been available (e.g. allocated or committed) for less than 2 years
	Marketing and enquiry interest	1	No evidence of active marketing, recent completions or development under construction at the time of the survey. On developed sites vacancy levels may appear very high
		2	Evidence of limited marketing but low level of interest for employment uses indicated by agents / limited or no recent completions or development under construction at the time of the survey. On developed sites, vacancy levels may appear high
		3	Evidence of active marketing with moderate levels of interest for employment uses indicated by agents / may be some recent completions or development under construction at the time of the survey. On developed sites, vacancy levels appear average
		4	Evidence of active marketing with high levels of interest for employment uses indicated by agents / good level of recent completions or development under construction at the time of the survey. On developed sites, vacancy levels appear low

		5	Not Applicable
Ownership	Ownership / Owner aspirations	1	Site owner(s) actively pursuing non-employment uses (e.g. extant planning permission exists for non-employment use / recent pre-application discussions/ submissions for non employment uses through LDP)
		2	Site is in unknown multiple / single ownership, no extant planning permissions / recent pre-application discussions for employment or non-employment development, owner aspirations unknown
		3	Site is in known multiple / single ownership, no extant planning permissions for employment or non-employment development, owner aspirations for employment appear neutral
		4	Site owner(s) actively pursuing employment uses (e.g. extant planning permission exists for employment use / recent pre-application discussions)
Site development constraints	Environmental constraints and abnormal development requirements [e.g. landscape / nature conservation designations,	1	The site is constrained by several environmental constraints / abnormal development requirements which will likely significantly limit development potential
		2	The site is constrained by some environmental constraints / abnormal development requirements which could limit development

	heritage features (listed buildings and conservation areas), TPO's and identified development requirements / issues / constraints set out in Local Plan policies, site development briefs etc.] **		potential
		3	The site is unlikely to be significantly constrained by environmental constraints / abnormal development requirements and these issues will likely only have a minimal impact on development potential
		4	There are no identified environmental or known abnormal development requirements applying to the site
	Physical site features (e.g. site size, shape, topography, pylons, drainage ditches and known underground utilities infrastructure dissecting the site) **	1	significantly constrained by physical site features
		2	constrained by certain physical site features
		3	may have some physical constraining features
		4	no apparent evidence of physical constraining features
	Ground conditions/contamination **	1	Likely to be significantly contaminated requiring substantial ground preparation and remediation
		2	Likely to be contaminated requiring some ground preparation and remediation
		3	Likely to be only limited potential for contamination requiring minimal

			ground preparation and remediation works
		4	Contamination unlikely, no significant ground preparation works required
		5	Not Applicable
	Flooding	1	High risk of flooding on the site (Flood Risk Zone C1 )
		2	Medium risk of flooding on site (Flood Risk Zone C2)
		3	Low / no risk of flooding on site (Flood Risk Zone A/B)

\* Applies to occupied sites / re-use opportunities only

\*\* Applies to vacant / part vacant sites and redevelopment opportunities only

**Environmental Sustainability Assessment Criteria**

Appraisal criteria	Indicator	Score	Scoring criteria
Prudent use of Natural Resources	Sequential Location	1	The site is located in the Linked settlements or other locations
		2	The site is located out of an urban and rural service centre, but within close proximity to the boundary of an urban / rural service area
		3	The site is located adjacent to an existing urban or rural centre
		4	The site is located within an existing urban or rural service centre
	Land classification	1	The site is predominately / wholly Greenfield
		2	The site is less than 50% brownfield
		3	The site is more than 50% brownfield
		4	The site is wholly brownfield
	Ease of access to public transport	1	The site is not located on an hourly bus route
		2	The site is more than 10 minutes walk from an hourly bus service route
		3	The site is less than 10 minutes walk from an hourly bus service route
		4	The site is less than 5 minutes walk from an hourly bus service route and is close to a rail or bus station
	Ease of walking and	1	There are no existing footpaths or cycle links to the site

	cycling	2	There are some footpaths or cycle links to the site although provision is limited and is not continuous
		3	There are reasonable footpath and/ or cycle links to the site but use may be constrained by certain factors
		4	There are good and attractive footpath and cycle links to the site
Effective protection and enhancement of the Environment	Potential to enhance environmental quality without impacting on the sensitivity of environmental resources **	1	Development of a greenfield site which would significantly detract from the existing environmental quality and would be detrimental to the environmental resources in this area
		2	Development / redevelopment will neither detract nor enhance the townscape or additionally impact on the environmental resources in the area
		3	Development / redevelopment will provide an improvement to the existing townscape quality without additionally impacting on environment resources
		4	Development / redevelopment will significantly improve the quality of the wider environmental quality and townscape without impacting on environmental resources

\* Applies to occupied sites / re-use opportunities only \*\* Applies to vacant / part vacant sites and redevelopment opportunities only



### Strategic Planning Assessment Criteria

Appraisal criteria	Indicator	Score	Scoring criteria
Regeneration and Economic Development	Potential to address multiple deprivation	1	The site is within a neighbourhood ranked within the most affluent for multiple deprivation (ward level data is in top quartile of least deprived (75% plus) for the county)
		2	The site is within a neighbourhood ranked as average to affluent for multiple deprivation (ward level data is in the 50% to 75% least deprived quartile for the county)
		3	The site is within a neighbourhood ranked as average to deprived for multiple deprivation (ward level data is in the 50% to 25% quartile for deprivation in the county)
		4	The site is within a neighbourhood ranked as deprived for multiple deprivation (ward level data is in the 25% or below quartile for deprivation in the county)
	Ability to deliver specific regeneration and / or regeneration objectives (including comprehensive/ mixed use development)	1	Development/ redevelopment of the site would significantly conflict with local regeneration and / or economic strategies for the area
		2	Development/ redevelopment of the site would likely have a neutral impact on local regeneration and / or economic strategies for the area

		3	Development/ redevelopment of the site could contribute towards local regeneration and / or economic strategies for the area
		4	Development / redevelopment of the site could make a substantial contribution towards local regeneration and / or economic strategies for the area
	Ability to improve local economic activity rates	1	The site is located in a ward of high economic activity (ward level data is in top quartile of least economically deprived (75% plus) for the county)
		2	The site is located in a ward of good economic activity (Ward level data is in the 50% to 75% least economically deprived quartile for the county)
		3	The site is located in a ward of moderate economic activity (ward level data is in the 50% to 25% quartile for economic deprivation in the county)
		4	The site is located in a ward of low economic activity (ward level data is in the 25% or below quartile for economic deprivation in the county)

**Notes sheet for site survey****Site name/Allocation number:**

	<b>Comment</b>
<b>Multiple uses on site</b>	
<b>Description of operations</b> Including use class if known	
<b>Potential for other uses</b> Consider potential for other uses based on location to services, sustainability, compliance with policy, whether the site is strategically located etc – consider whether if this site shut down i.e. a saw mill – would it realistically start as something else and if possible would we support such an application? And if so would it be for a singular or multiple use?	
<b>S02- S04 policy compatibility</b> Consider the application in accordance with S0 policies and mark compliance i.e. S04	

requires that any dev in linked settlements and other locations is commensurate with the size of the settlement – so you need to consider whether the site is commensurate with its settlement	
<b>Site survey complete</b>	

### 19. Appendix 3 Settlement specific maps

