



**Parc Cenedlaethol  
Arfordir Penfro**  

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**Pembrokeshire Coast  
National Park**

# **Employment Survey Report, 2022**

## **September 2025**

**Pembrokeshire County Council**

**and**

**Pembrokeshire Coast National Park Authority**

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# 1 Introduction

- 1.1 Pembrokeshire County Council carried out employment surveys for land within its planning jurisdiction on a bi-annual basis from 2003 to 2013. Since 2013, there have been further surveys, in 2015, 2016, 2017, 2019 and most recently 2022. Since 2017, the surveys have also included key employment sites within the Pembrokeshire Coast National Park.
- 1.2 The survey methodology has been reviewed to conform with the latest Welsh Government planning advice. In particular, it reflects the requirements of:
  - The current edition of Planning Policy Wales
  - Technical Advice Wales 23 on Economic Development and
  - Practice Guidance on Building an Economic Development Evidence Base to Support a Local Development Plan.
- 1.3 The baseline for the new survey methodology is 2013. However, the methodology has been further updated since then and National Park sites were included from 2017. 2013 coincides with the adoption date of the Council's Local Development Plan (LDP) while 2017 was the date that LDP review commenced at PCC. For the National Park Authority, their first LDP was adopted in 2010 and their replacement LDP (LDP 2) reached adoption in 2020. For each survey year, the position set out is that for the 1<sup>st</sup> April in that year. The survey methodology is outlined below.
- 1.4 For the purposes of this report, employment land uses are taken to include those in Use Classes B1, B2, B8, A2 (offices) and Sui Generis uses that closely relate to the B Class uses.
- 1.5 Also, for the purposes of providing comparative data for the 2022 Employment Survey Report, the results from the earlier surveys in 2013, 2017 and 2019 are included, alongside those for 2022.

## 2 Methodology

### 2.1 The 2022 employment survey covers:

- All County Council LDP employment and mixed-use allocations (policies SP 3, GN.5 and GN.7). A marina proposal (policy GN.21) with an employment element is also included.
- All existing employment sites listed in the Council's Development Sites SPG. This does not cover all existing employment sites, but it does include the main ones. The list of sites is periodically reviewed.
- Windfall employment sites of more than 0.5 hectares in the Council's planning area, where permitted since adoption of the Council's LDP and where not already on the Development Sites SPG existing sites list.
- The main employment sites within the Pembrokeshire Coast National Park, nominated for inclusion by the National Park Authority.

### 2.2 Small sites in the Council's planning area (windfall employment sites of less than 0.5 hectares consented since adoption of the Council's LDP) are referenced, but these are not surveyed.

### 2.3 In total 85 sites were surveyed in 2022, of which 77 were in the Council's planning area and 8 in the National Park. The information collected for each of these is:

- The site area
- The buildings and land within each site area that were in use
- The vacant land and buildings not in use within each surveyed site
- Buildings and open land in use for employment purposes
- Buildings and enclosures in use for other purposes within an employment site  
*(this covers land areas that are not being used for purposes which are within use classes B1, B2, B8 and A2 – or for Sui Generis uses closely related to the B class employment uses)*

- Land used for infrastructure and landscaping or likely to be difficult to develop  
*(this includes shared infrastructure such as roads and car parking, landscaped areas and land unlikely to be amenable for development, perhaps because of steep topography or poor access)*
- An area-based breakdown for land and buildings in use, into the component land uses, the categories being use classes B1, B2, B8, A2 and 'Other' and
- For sites in the Council's planning area, planning application reference numbers for employment and non-employment planning permissions.

Historic information from 2013, 2017 and 2019 is shown for comparative purposes, but that for surveys prior to 2013 and also for 2015 and 2016 is not included in this report.

2.4 Area measurements are recorded in square metres. These can be converted into hectares by dividing by 10,000.

2.5 A results spreadsheet, recording the full results from the 2022 survey, has been prepared (see chapter 13).

### 3 Overview of changes 2013-2022 and summary of the 2022 results (where comparative data is not available)

#### Baseline position

- 3.1 The total site area of land identified for employment purposes (permitted, allocated or built) in 2013 (the baseline position) was 11,373,700 m<sup>2</sup> (1137.37 hectares). However, this figure relates only to the Council's area of planning jurisdiction and does not include National Park sites.

By 2017, this figure had risen to 11,999,136 m<sup>2</sup> (1199.91 hectares) in PCC's planning area, with the National Park contribution being 848,231 m<sup>2</sup> (84.82 hectares).

The equivalent figures for 2019 were 12,062,522 m<sup>2</sup> (1206.25 hectares) in the Council's planning area and 848,232 m<sup>2</sup> (84.82 hectares) in the National Park.

The 2022 survey results have seen the figure for the Council's planning area further increase to 12,361,884 m<sup>2</sup> (1236.19 hectares) and the equivalent total for the National Park rise to 856,288 m<sup>2</sup> (85.62 hectares).

For the 2022 survey, efforts were made to improve the digitising of sites and to reduce anomalies in the table of results. However, the main contributors to the increases in provision over successive years have been expansions on sites already included in the survey onto new land or previously vacant land and the inclusion of a few new sites each time the survey is conducted, mostly in response to new permissions being granted on windfall sites.

#### Site area in use

- 3.2 The site area in use in 2013 was 9,448,700 m<sup>2</sup> (944.87 hectares), this figure not including National Park sites.

In 2017, the figure had increased to 9,837,489 m<sup>2</sup> (983.75 hectares) for sites in the Council's planning area and was recorded as 811,405 m<sup>2</sup> (81.14 hectares) in the National Park.

For 2019, the figures had further increased to 9,944,211 m<sup>2</sup> (994.42 hectares) in the Council's planning area and 812,089 (81.21 hectares) in the National Park.

The 2022 survey results show further increases, to 10,373,519 m<sup>2</sup> (1037.35 hectares) in the Council's planning area and 825,632 m<sup>2</sup> (82.56 hectares) in the National Park.

### Vacant land and buildings

- 3.3 The vacant land figure included vacant buildings in 2013 and was recorded as 1,925,000 m<sup>2</sup> (192.50 hectares), this figure not including National Park sites. From 2017 onwards, PCC and National Park figures are available and figures for vacant buildings are recorded separately from those for vacant land.

In 2017, the vacant land (this time excluding buildings) for sites in the Council's area was 1,995,261 m<sup>2</sup> (199.53 hectares), with the equivalent figure for the National Park being 36,100 m<sup>2</sup> (3.61 hectares). Buildings not in use in 2017 occupied 166,386 m<sup>2</sup> (16.64 hectares) in the Council's planning area and 726 m<sup>2</sup> (0.07 hectares) in the National Park.

In 2019, the vacant area figure reduced to 1,931,942 m<sup>2</sup> (193.19 hectares) in the Council's area and to 35,403 m<sup>2</sup> (3.54 hectares) in the National Park. The buildings not in use figures for 2019 were 186,369 m<sup>2</sup> (18.64 hectares) for the Council's planning area and 740 m<sup>2</sup> (0.07 hectares) in the National Park.

The 2022 survey results show a further reduction in the vacant area figure, to 1,826,431 m<sup>2</sup> (182.64 hectares) in the Council's area and to 30,492 m<sup>2</sup> in the National Park. The buildings not in use figures for 2022 were 161,934 m<sup>2</sup> (16.19 hectares) in the Council's planning area and 163 m<sup>2</sup> (0.02 hectares) in the National Park.

3.4 In 2022, the geographical distribution of the vacant land excluding buildings and buildings not in use (in combination and for Council and National Park sites together) was as follows:

- Pembroke and Pembroke Dock – 15.61% in 2022 (15.84% in 2019)
- Milford Haven and Waterston – 27.88% in 2022 (26.24% in 2019)
- Haverfordwest and Merlins Bridge – 21.65% in 2022 (21.59% in 2019)
- Fishguard, Goodwick, Scleddau and Trecwn – 16.63% in 2022 (17.26% in 2019)
- Neyland – 5.28% in 2022 (5.47% in 2019)
- Narberth – 0.45% in 2022 (0.50% in 2019)
- Other locations within the Council's planning area – 10.98% in 2022 (11.30% in 2019) and
- National Park sites – 1.52% in 2022 (1.80% in 2019).

There is some variation between 2019 and 2022, but the two sets of figures are not significantly different.

3.5 The land area covered by buildings / enclosures in use for employment purposes in the Council's planning area in 2017 was recorded as 6,987,520 m<sup>2</sup> (698.75 hectares), with a further 784,956 m<sup>2</sup> (78.50 hectares) recorded in the National Park area. Buildings / enclosures in use on the surveyed sites for other purposes in 2017 was recorded as 2,253,095 m<sup>2</sup> in the Council's planning area and 2,915 m<sup>2</sup> in the National Park.

In 2019, the land area covered by buildings / enclosures in use for employment purposes increased slightly in the Council's planning area to 7,024,103 m<sup>2</sup> (702.4 hectares) and 785,795 m<sup>2</sup> in the National Park area. Also in 2019, buildings / enclosures in use for non-employment purposes covered 2,278,658 m<sup>2</sup> in the Council's planning area, plus 2,284 m<sup>2</sup> in the National Park.

In 2022, the land area covered by buildings / enclosures in use for employment purposes increased further in the Council's planning area to 7,163,938.43 m<sup>2</sup> and to 793,414.30 m<sup>2</sup> in the National Park. Also in 2022, buildings / enclosures in use for non-employment purposes covered 2,483,106.33 m<sup>2</sup> in the Council's planning area, plus 3,659.96 m<sup>2</sup> in the National Park.



There is a modest but growing trend towards the use of land and buildings on employment sites across Pembrokeshire for a variety of non-employment uses.

### Land used for infrastructure, landscaping or otherwise considered to be difficult to develop

- 3.6 Land used for infrastructure, landscaping or otherwise considered to be difficult to develop is recorded separately from the vacant land excluding buildings and the buildings not in use.

In 2017, the land area figure in this category for the Council's planning area was recorded as 594,885 m<sup>2</sup> (59.49 hectares) and in the National Park as 23,281 m<sup>2</sup> (2.33 hectares). In 2019, these figures increased to 641,450 m<sup>2</sup> (64.15 hectares) for the Council's planning area and 24,009 m<sup>2</sup> (2.40 hectares) for the National Park. For 2022, the equivalent figures were 726,473.88 m<sup>2</sup> (72.65 hectares) for the Council's planning area and 28,557.94 m<sup>2</sup> (2.86 hectares).

Again, the trend is for gradual growth in this category, possibly partly attributable to the provision of more supporting infrastructure on sites and to more extensive use of landscaping for screening purposes.

- 3.7 For land in use for employment and other purposes on the surveyed sites, the land areas used in the various recorded categories were as follows in 2017:

Council's planning area:

- Class B1 – 54,274 m<sup>2</sup> (5.43 hectares)
- Class B2 – 2,590,801 m<sup>2</sup> (259.08 hectares)
- Class B8 – 4,340,918 m<sup>2</sup> (434.09 hectares)
- Class A2 – 1,527 m<sup>2</sup> (0.15 hectares) and
- Other – 2,253,095 m<sup>2</sup> (225.31 hectares)

National Park:

- Class B1 – 616 m<sup>2</sup> (0.06 hectares)
- Class B2 – 780,508 m<sup>2</sup> (78.05 hectares)
- Class B8 – 3,832 m<sup>2</sup> (0.38 hectares)
- Class A2 – 0 m<sup>2</sup> (0 hectares) and
- Other – 2,915 m<sup>2</sup> (0.29 hectares)

The comparable figures for 2019 are as follows:

Council's planning area:

- Class B1 – 53,166 m<sup>2</sup> (5.32 hectares)
- Class B2 – 2,633,678 m<sup>2</sup> (263.37 hectares)
- Class B8 – 4,336,066 m<sup>2</sup> (433.61 hectares)
- Class A2 – 1,193 m<sup>2</sup> (0.12 hectares) and
- Other – 2,278,658 m<sup>2</sup> (227.87 hectares)

National Park:

- Class B1 – 664 m<sup>2</sup> (0.07 hectares)
- Class B2 – 777,829 m<sup>2</sup> (77.78 hectares)
- Class B8 – 7,302 m<sup>2</sup> (0.73 hectares)
- Class A2 – 0 m<sup>2</sup> (0 hectares) and
- Other – 2,284 m<sup>2</sup> (0.23 hectares)

For 2022, the figures are as follows:

Council's planning area:

- Class B1 – 53,944.12 m<sup>2</sup> (5.39 hectares)
- Class B2 – 4,981,151.98 m<sup>2</sup> (498.12 hectares)
- Class B8 – 2,127,813.69 m<sup>2</sup> (212.78 hectares)
- Class A2 – 1,028.64 m<sup>2</sup> (0.10 hectares) and
- Other – 2,483,106 m<sup>2</sup> (248.31 hectares)

National Park:

- Class B1 – 1100.34 m<sup>2</sup> (0.11 hectares)
- Class B2 – 778,620.11 m<sup>2</sup> (77.86 hectares)
- Class B8 – 13693.85 m<sup>2</sup> (1.37 hectares)
- Class A2 – 0 m<sup>2</sup> (0 hectares) and
- Other – 3,659.96 m<sup>2</sup> (0.37 hectares)

The figures present a broadly consistent picture from 2017 through to 2022, but there is one important exception to this, relating to the split of the B2 and B8 figures for Council planning area sites between 2019 and 2022. The figure for the B2 use class significantly increases in 2022, while that for the B8 uses is much lower. This is largely attributable to a re-evaluation of the appropriate use class classifications for some of the major industrial sites along the Haven Waterway between the 2019 and 2022 surveys.

There may be further changes to that balance in future years as Celtic Freeport proposals come forward, based on the transformation from carbon-rich industrial activities to those based on hydrogen, to energy storage proposals and to activities related to the development of offshore floating wind energy proposals in the Celtic Sea. However, that will be something on which future surveys will report.

## 4 Area-based results

4.1 Locations in the Pembroke Dock / Pembroke and Milford Haven / Waterston areas make the biggest contributions to the site area totals, providing more than 75% of the employment land surveyed. The major industrial sites along the Haven Waterway are of at least national importance and this is clearly reflected in the survey outcomes.

4.2 The table below presents a summary of the total site area results by geographical location for 2017, 2019 and 2022:

<b>Location</b>	<b>2017 total m<sup>2</sup></b>	<b>2017 %</b>	<b>2019 total m<sup>2</sup></b>	<b>2019 %</b>	<b>2022 total m<sup>2</sup></b>	<b>2022 %</b>
1. Pembroke and  Pembroke Dock Area	5,081,631	39.55 %	5,109,816	39.58 %	5,320,657.90	40.25 %
2. Milford Haven  and Waterston Area	4,828,341	37.58 %	4,828,607	37.40 %	4,842,261.87	36.63 %
3. Haverfordwest and Merlins Bridge Area	751,913	5.85 %	763,712	5.92 %	817,892.29	6.19 %

<b>Location</b>	<b>2017 total m<sup>2</sup></b>	<b>2017 %</b>	<b>2019 total m<sup>2</sup></b>	<b>2019 %</b>	<b>2022 total m<sup>2</sup></b>	<b>2022 %</b>
4. Fishguard and Goodwick, including Scleddau and Trecwn Area	435,407	3.39 %	435,374	3.37 %	433,896.48	3.28 %
5. Neyland Area	226,540	1.76 %	226,541	1.75 %	226,509.62	1.71 %
6. Narberth Area	53,456	0.42 %	53,454	0.41 %	53,450.30	0.40 %
7. Other Areas PCC	621,848	4.84 %	645,018	5.00 %	667,215.36	5.05 %
8. National Park Authority sites	848,231	6.60 %	848,232	6.57%	856,287.61	6.48 %
<b>Totals</b>	<b>12,847,367</b>	<b>100 %</b>	<b>12,910,754</b>	<b>100 %</b>	<b>13,218,171.43</b>	<b>100 %</b>

- 4.3 Most of the major industrial installations along or close to the Milford Haven Waterway are located within PCC's area of planning jurisdiction. However, a significant part of the South Hook LNG terminal is located within the National Park – and indeed this is by far the largest industrial site within the National Park. As well as South Hook LNG, the other key industrial sites along or close to the Waterway are the Valero Refinery, Pembroke Power Station, the Puma Energy site, Dragon LNG etc' at Waterston and Blackbridge (where there is no current use, but a LDP employment allocation is in place).

## 5 Pembroke and Pembroke Dock area

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	5,027,100	502.71
2017	5,081,631	508.16
2019	5,109,816	510.98
2022	5,320,657.90	532.07
Change 2019-2022	+ 210,841.90	+ 21.08

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	4,644,200	464.42
2017	4,751,407	475.14
2019	4,787,051	478.71
2022	5,005,369.75	500.54
Change 2019-2022	+ 218,318.75	+ 21.83

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	382,900	38.29
2017 vacant area	317,439	31.74
2017 buildings not in use	12,785	1.28
2019 vacant area	311,580	31.16
2019 buildings not in use	11,185	1.12
2022 vacant area	307,930.79	30.79
2022 buildings not in use	7,357.36	0.74
Change 2019-2022 vacant area	- 3,649.21	- 0.36
Change 2019-2022 buildings not in use	- 3,827.64	- 0.38

- 5.1 Pembroke and Pembroke Dock area conclusions – the total site area available for employment purposes has increased with each successive survey, 2013 through to 2022. The site area in use figures have also increased with each successive survey. Regarding vacant land area and vacant buildings, the trend is for a gentle reduction with each successive survey.

Pembroke and Pembroke Dock area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	5,320,657.90	532.07	
Buildings / enclosures in use for employment purposes	2,499,836.21	249.98	46.98 %
Buildings / enclosures in use for other purposes	2,310,490.01	231.05	43.42 %
Buildings not in use	7357.36	0.74	0.13 %
Vacant, undeveloped	307,930.79	30.79	5.79 %
Infrastructure, landscaping and difficult to develop land	195,043.53	19.50	3.67 %

- 5.2 The table above demonstrates that just under 47% of the available land was in use for employment purposes. About 43% was in use for other purposes. This mainly reflects the classification of Pembroke Power Station as a sui generis use, rather than a B Class use. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just under 6% of the total. Infrastructure, landscaping and ‘difficult to develop’ land made up slightly less than 4% of the total.



Pembroke and Pembroke Dock area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	27,821.88	2.78
Use class B2	2,305,350.13	230.54
Use class B8	166,664.20	16.67
Use class A2	0	0

- 5.3 The table above confirms that most of the in-use employment land in the Pembroke / Pembroke Dock area is in use class B2 (general industrial).
- 5.4 Of the 9 sites surveyed in 2022, 3 included land being advertised for sale.

## 6 Milford Haven and Waterston area

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	4,501,000	450.10
2017	4,828,341	482.83
2019	4,828,607	482.86
2022	4,842,261.87	484.23
Change 2019-2022	+ 13,654.87	+ 1.37

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	3,984,800	398.48
2017	4,177,708	417.77
2019	4,177,404	417.74
2022	4,279,354.88	427.94
Change 2019-2022	+ 101,950.88	+ 10.20

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	516,200	51.62
2017 vacant area	536,577	53.66
2017 buildings not in use	114,056	11.41
2019 vacant area	516,201	51.62
2019 buildings not in use	135,002	13.50
2022 vacant area	435,740.97	43.57
2022 buildings not in use	127,166.02	12.72
Change 2019-2022 vacant area	- 80,460.03	- 8.05
Change 2019-2022 buildings not in use	- 7,835.98	- 0.78

- 6.1 Milford Haven and Waterston area conclusions – the total site area available for employment purposes has increased with each successive survey, 2013 through to 2022. The site area in use figures increased between 2013 and 2017, fell slightly between 2017 and 2019 and then increased modestly between 2019 and 2022. Regarding vacant land area and vacant buildings, the trends are not that clear. There was an increase between 2013 and 2017. Between 2017 and 2019, the vacant land area falls slightly, while the buildings not in use area increases slightly. Between 2019 and 2022, the vacant land area and buildings not in use areas both reduce.

Milford Haven and Waterston area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	4,842,261.87	484.23	
Buildings / enclosures in use for employment purposes	4,105,993.44	410.60	84.79 %
Buildings / enclosures in use for other purposes	50,007.01	5.00	1.03 %
Buildings not in use	127,166.02	12.72	2.63 %
Vacant, undeveloped	435,740.97	43.57	9.00 %
Infrastructure, landscaping and difficult to develop land	123,354.43	12.34	2.55 %

- 6.2 The table above demonstrates that just under 85% of the available land was in use for employment purposes. Just over 1% was in use for other purposes. Buildings not in use represent just over 2.5% of the total. Vacant, undeveloped land accounted for 9% of the total. Infrastructure, landscaping and ‘difficult to develop’ land made up just over 2.5% of the total.

Milford Haven and Waterston area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	8,623.83	0.86
Use class B2	2,525,548.46	252.55
Use class B8	1,571,122.76	15.71
Use class A2	698.39	0.07

- 6.3 The table above confirms that most in-use employment land in the Milford Haven / Waterston area is in class B2 (general industrial).
- 6.4 Of the 12 sites surveyed in 2022, 3 included land being advertised for sale.

## 7 Haverfordwest and Merlins Bridge area

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	685,300	68.53
2017	751,913	75.19
2019	763,712	76.37
2022	817,892.29	81.79
Change 2019-2022	+ 54,180.29	+ 5.42

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	260,700	26.07
2017	314,099	31.41
2019	334,824	33.48
2022	380,719.10	38.07
Change 2019-2022	+ 45,895.10	+ 4.59

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	424,600	42.46
2017 vacant area	434,774	43.48
2017 buildings not in use	3,040	0.30
2019 vacant area	424,671	42.47
2019 buildings not in use	4,217	0.42
2022 vacant area	434,793.79	43.48
2022 buildings not in use	2,379.40	0.24
Change 2019-2022 vacant area	+10,122.79	+1.01
Change 2019-2022 buildings not in use	- 1,837.60	- 0.18

- 7.1 Haverfordwest and Merlins Bridge area conclusions – the total site area available for employment purposes has increased with each successive survey, 2013 through to 2022. The site area in use figures have also steadily increased with each successive survey. Regarding vacant land area and vacant buildings, the trends are not entirely clear. For vacant land, there was an increase between 2013 and 2017, a fall between 2017 and 2019 and then an increase back to about 2017 levels in 2022. For buildings not in use, the figures are fairly low generally, with a slight increase between 2017 and 2019 and then a reduction between 2019 and 2022.

Haverfordwest and Merlins Bridge area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	817,892.29	81.79	
Buildings / enclosures in use for employment purposes	192,889.10	19.29	23.58 %
Buildings / enclosures in use for other purposes	41,627.36	4.16	5.09 %
Buildings not in use	2,379.40	0.24	0.29 %
Vacant, undeveloped	434,793.79	43.48	53.16 %
Infrastructure, landscaping and difficult to develop land	146,202.64	14.62	17.88 %

- 7.2 The table above demonstrates that slightly more than 23.5% of the available land was in use for employment purposes. Just over 5% was in use for other purposes. Buildings not in use represented an insignificant proportion of the total, while just over 53% of the available land was vacant and undeveloped. However, it is worth noting that in this case, the overall land areas involved are much smaller than, for example, at Pembroke and Pembroke Dock and at Milford Haven and Waterston. Infrastructure, landscaping and ‘difficult to develop’ land made up just under 18% of the total, partly reflecting the amount of infrastructure that has been installed on the site, for example in terms of the road network.



Haverfordwest and Merlins Bridge area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use	m <sup>2</sup>	Hectares
for employment purposes, 2022		
Use class B1	7,122.45	0.71
Use class B2	56,503.24	5.65
Use class B8	129,206.58	12.92
Use class A2	56.83	0.01

- 7.3 The table above confirms that most in-use employment land in the Haverfordwest and Merlins Bridge area is in classes B2 (general industrial) and B8 (distribution and storage).
- 7.4 Of the 14 sites surveyed in 2022, 6 included land being advertised for sale.

8 Fishguard and Goodwick, including Scleddau and Trecwn, area

Total Site Area

Year	m <sup>2</sup>	Hectares
2013	433,800	43.38
2017	435,407	43.54
2019	435,374	43.54
2022	433,896.48	43.39
Change 2019-2022	- 1477.52	- 0.15

Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	146,700	14.67
2017	70,268	7.03
2019	74,066	7.41
2022	98,116.35	9.81
Change 2019-2022	+ 24,050.35	+ 2.41

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	287,100	28.71
2017 vacant area	343,070	34.31
2017 buildings not in use	22,069	2.21
2019 vacant area	339,615	33.96
2019 buildings not in use	21,693	2.17
2022 vacant area	313,727.06	31.37
2022 buildings not in use	22,053.07	2.21
Change 2019-2022 vacant area	- 25,887.84	- 2.59
Change 2019-2022 buildings not in use	+ 360.07	+ 0.04

- 8.1 Fishguard and Goodwick, including Scloddau and Trecwn, area conclusions – there has been very little change in the total site area available for employment purposes over the period 2013 to 2022. The site area in use figure reduced somewhat between 2013 and 2017, changed little between 2017 and 2019 and slightly rose between 2019 and 2022. Regarding vacant land area and vacant buildings, the vacant land area rose between 2013 and 2017, but has gently fallen since then, while for buildings not in use the figures have remained steady throughout the period monitored.

Fishguard and Goodwick, including Scleddau and Trecwn area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	433,896.48	43.39	
Buildings / enclosures in use for employment purposes	47,902.84	4.79	11.04 %
Buildings / enclosures in use for other purposes	15,060.06	1.51	3.47 %
Buildings not in use	22,053.07	2.21	5.08 %
Vacant, undeveloped	313,727.06	31.37	72.30 %
Infrastructure, landscaping and difficult to develop land	35,153.45	3.52	8.10 %

- 8.2 The table above demonstrates that slightly more than 11% of the available land was in use for employment purposes. Just under 3.5% was in use for other purposes. This indicates that a low proportion of the available land was in use at the survey date. Buildings not in use represented just above 5% of the total. Vacant, undeveloped land accounted for just over 72% of the total. Infrastructure, landscaping and ‘difficult to develop’ land made up just over 8% of the total.

Fishguard and Goodwick, including Scleddau and Trecwn area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use	m <sup>2</sup>	Hectares
for employment purposes, 2022		
Use class B1	1,893.62	0.19
Use class B2	2,924.51	0.29
Use class B8	42,942.56	4.29
Use class A2	142.15	0.01

- 8.3 The table above confirms that most in-use employment land in the Fishguard and Goodwick, including Scleddau and Trecwn, area is in class B8 (distribution and storage).
- 8.4 Of the 8 sites surveyed in 2022, 4 included land being advertised for sale.

9 Neyland area

Total Site Area

Year	m <sup>2</sup>	Hectares
2013	225,600	22.56
2017	226,540	22.65
2019	226,541	22.65
2022	226,509.62	22.65
Change 2019-2022	- 31.38	0

Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	123,200	12.32
2017	113,905	11.39
2019	115,240	11.52
2022	119,973.09	12.00
Change 2019-2022	+ 4,733.09	+ 0.47

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	102,400	10.24
2017 vacant area	107,220	10.72
2017 buildings not in use	5,415	0.54
2019 vacant area	107,672	10.77
2019 buildings not in use	3,629	0.36
2022 vacant area	105,424.69	10.54
2022 buildings not in use	1,111.84	0.11
Change 2019-2022 vacant area	- 2247.31	- 0.22
Change 2019-2022 buildings not in use	- 2517.16	- 0.25

- 9.1 Neyland area conclusions – there has been relatively little change in the total site area available for employment purposes over the period 2013 to 2022. The site area in use figure reduced slightly between 2013 and 2017, with slight increases then recorded between 2017 and 2019 and again between 2019 and 2022. Regarding vacant land and vacant buildings, the vacant land area rose slightly from 2013 to 2017 and again from 2017 to 2019, with a slight fall following between 2019 and 2022. The buildings not in use figure is very low and has reduced with each successive survey.

Neyland area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	226,509.62	22.65	
Buildings / enclosures in use for employment purposes	51,268.31	5.13	22.63 %
Buildings / enclosures in use for other purposes	15,814.62	1.58	6.98 %
Buildings not in use	1,111.84	0.11	0.49 %
Vacant, undeveloped	105,424.69	10.54	46.54 %
Infrastructure, landscaping and difficult to develop land	52,890.16	5.29	23.35 %

- 9.2 The table above demonstrates that just under 23% of the available land was in use for employment purposes. Just under 7% was in use for other purposes. Buildings not in use represented just under 0.5% of the total. Vacant, undeveloped land accounted for about 46.5% of the total, although the total land area involved in this case is modest, at just over 10.5 hectares. Infrastructure, landscaping and ‘difficult to develop’ land made up just over 23% of the total.



Neyland area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	2,194.14	0.22
Use class B2	14,914.36	1.49
Use class B8	34,159.81	3.42
Use class A2	0	0

- 9.3 The table above confirms that most in-use employment land in the Neyland area is in class B8 (distribution and storage). Of the remainder, the next most commonly occurring land use is class B2 (general industrial).
- 9.4 Of the 3 sites surveyed in 2022, 2 included land being advertised for sale.

## 10 Narberth area

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	46,500	4.65
2017	53,456	5.35
2019	53,454	5.35
2022	53,450.30	5.35
Change 2019-2022	- 3.70	0

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	31,400	3.14
2017	38,425	3.84
2019	43,469	4.35
2022	44,384.91	4.44
Change 2019-2022	+ 915.91	+ 0.09

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	15,100	1.51
2017 vacant area	15,031	1.50
2017 buildings not in use	0	0
2019 vacant area	9,858	0.99
2019 buildings not in use	127	0.01
2022 vacant area	9065.39	0.91
2022 buildings not in use	0	0
Change 2019-2022 vacant area	- 792.61	- 0.08
Change 2019-2022 buildings not in use	- 127	- 0.01

- 10.1 Narberth area conclusions – there was a slight increase in land available for employment purposes between 2013 and 2017, with available land staying at the same level from 2017 onwards. The site area in use figure has gradually increased from 2013 through to 2022. Regarding vacant land and vacant buildings, the vacant land area has gradually fallen over the period 2013 to 2022, while the buildings not in use figure was recorded as zero in 2017 and 2022, with a very low figure being recorded for 2019.

Narberth area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	53,450.30	5.35	
Buildings / enclosures in use for employment purposes	24,280.91	2.43	45.43 %
Buildings / enclosures in use for other purposes	6,803.03	0.68	12.73 %
Buildings not in use	0	0	0 %
Vacant, undeveloped	9065.39	0.91	16.96 %
Infrastructure, landscaping and difficult to develop land	13,300.97	1.33	24.88 %

- 10.2 The table above demonstrates that just over 23% of the available land was in use for employment purposes. Just under 13% was in use for other purposes. There were no buildings recorded as not being in use in 2022. Vacant, undeveloped land accounted for just under 17% of the total, although the total land area involved in this case is small, being recorded as just under 1 hectare. Infrastructure, landscaping and ‘difficult to develop’ land made up just under 25% of the total.

Narberth area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	0	0
Use class B2	8,549.49	0.85
Use class B8	15,731.42	1.57
Use class A2	0	0

- 10.3 The table above confirms that most in-use employment land in the Narberth area is in class B8 (distribution and storage). Of the remainder, the next most commonly occurring land use is class B2 (general industrial), with nil responses for use classes B1 and A2.
- 10.4 Of the 4 sites surveyed in 2022, none included land being advertised for sale.

## 11 Other locations in the Council's planning area

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	454,400	45.44
2017	621,848	62.18
2019	645,018	64.50
2022	667,215.36	66.72
Change 2019-2022	+ 22,197.36	+ 2.22

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	257,700	25.77
2017	371,677	37.17
2019	412,157	41.22
2022	445,600.56	44.56
Change 2019-2022	+ 33,443.56	+ 3.34

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	196,700	19.67
2017 vacant area	241,150	24.12
2017 buildings not in use	9,021	0.90
2019 vacant area	222,345	22.23
2019 buildings not in use	10,516	1.05
2022 vacant area	219,748.27	21.97
2022 buildings not in use	1,866.53	0.19
Change 2019-2022 vacant area	- 2,596.73	- 0.26
Change 2019-2022 buildings not in use	- 8,649.47	- 0.86

- 11.1 Other locations in the Council's planning area conclusions – there was a significant increase in the land available for employment purposes between 2013 and 2017. In the period between 2017 and 2022, the upward trend has continued, but at a much more modest level year-on-year. The site area in use figure also increased significantly between 2013 and 2017, with further, modest, increases being recorded between 2017 and 2022. Regarding vacant land and vacant buildings, the vacant land area increased between 2013 and 2017 but has gradually reduced in the period 2017 to 2022. The buildings not in use figures rose slightly between 2017 and 2019, but then fell away in 2022, primarily because disused buildings on two of the sites came back into use. However, the buildings not in use figures are generally quite low throughout the monitored period.

Other locations in the Council's planning area – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	667,215.36	66.72	
Buildings / enclosures in use for employment purposes	241,767.62	24.18	36.24 %
Buildings / enclosures in use for other purposes	43,304.24	4.33	6.49 %
Buildings not in use	1,866.53	0.19	0.28 %
Vacant, undeveloped	219,748.27	21.97	32.94 %
Infrastructure, landscaping and difficult to develop land	160,528.70	16.05	24.06 %

- 11.2 The table above demonstrates that just over 36% the available land was in use for employment purposes. A further 6.5% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just under 33% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 24% of the total.



Other locations in the Council's planning area – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	6,288.20	0.63
Use class B2	67,361.79	6.74
Use class B8	167,986.36	16.80
Use class A2	131.27	0.01

- 11.3 The table above confirms that most in-use employment land in other locations in the Council's planning area is in class B8 (distribution and storage). Of the remainder, the next most commonly occurring land use is class B2 (general industrial), with small amounts of in-use employment land also found in classes B1 and A2.
- 11.4 Of the 27 sites surveyed in 2022, 2 included land being advertised for sale.

## 12 National Park sites

### Total Site Area

Year	m <sup>2</sup>	Hectares
2013	Not recorded	Not recorded
2017	848,231	84.82
2019	848,232	84.82
2022	856,287.61	85.63
Change 2019-2022	+ 8,055.61	+ 0.81

### Site Area in Use

Year	m <sup>2</sup>	Hectares
2013	Not recorded	Not recorded
2017	811,405	81.14
2019	812,089	81.21
2022	825,632.20	82.56
Change 2019-2022	+ 13,543.20	+ 1.35

### Vacant Area (including buildings in 2013 and split thereafter)

Year	m <sup>2</sup>	Hectares
2013 vacant area and buildings	Not recorded	Not recorded
2017 vacant area	36,100	3.61
2017 buildings not in use	726	0.07
2019 vacant area	35,403	3.54
2019 buildings not in use	740	0.07
2022 vacant area	30,492.47	3.05
2022 buildings not in use	162.94	0.02
Change 2019-2022 vacant area	- 4,910.53	- 0.49
Change 2019-2022 buildings not in use	- 577.06	- 0.06

- 12.1 Pembrokeshire Coast National Park Authority sites were not included in the 2013 survey, but later surveys have included National Park sites, with a view to providing a whole-County analysis.
- 12.2 National Park sites conclusions – the land available for employment purposes was virtually identical in 2017 and 2019, but in 2022 increased by slightly less than a hectare. The site area in use figure slightly increased between 2017 and 2019 and then further increased by just over a hectare between 2019 and 2022. Regarding vacant land and vacant buildings, the vacant land area reduced slightly between 2017 and 2019 and further reduced by about 0.5 hectares between 2019 and 2022. The buildings not in use figure increases very slightly between 2017 and 2019 and then falls right away between 2019 and 2022. The buildings not in use figures are generally very low throughout the monitored period and by 2022 were minimal. One of the recorded sites in the National Park has been developed for housing since the 2022 survey – this will be picked up in the next survey.

National Park sites – table showing the proportions different use and non-use categories, 2022

2022 total site area	m <sup>2</sup>	Hectares	% of total
2022 total site area	856,287.61	85.63	
Buildings / enclosures	793,414.30	79.34	92.66 %
in use for employment purposes			
Buildings / enclosures	3,659.96	0.37	0.43 %
in use for other purposes			
Buildings not in use	162.94	0.02	0.02 %
Vacant, undeveloped	30492.47	3.05	3.56 %
Infrastructure, landscaping and difficult to develop land	28,557.94	2.86	3.34 %

- 12.3 The table above demonstrates that just under 93% of the available land was in use for employment purposes. Less than 0.5% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just over 3.5% of the total. Infrastructure, landscaping and ‘difficult to develop’ land made up slightly less than 3.5% of the total.

National Park sites – table showing land and buildings used for employment purposes, by use class, 2022

Buildings / enclosures in use for employment purposes, 2022	m <sup>2</sup>	Hectares
Use class B1	1100.34	0.11
Use class B2	778,620.11	77.86
Use class B8	13,693.85	1.37
Use class A2	0	0

12.4 The table above confirms that most in-use employment land on National Park sites is in the class B2 (general industrial) category. This is because the part of the South Hook LNG site in the National Park dominates the provision. Other use classes make a lesser contribution, with class B8 (distribution and storage) being the second largest contributor by use class. Use class B1 form a small element of the provision and no A2 uses are recorded. Although the provision of industrial land in the National Park is of a small scale if the South Hook LNG site is set to one side, the other sites nonetheless make an important local contribution.

12.5 Of the 8 sites surveyed in 2022, 1 included land being advertised for sale.

### 13 Small sites – windfall employment sites of less than 5,000 m<sup>2</sup> (0.5 hectares)

- 13.1 Small sites within the Council’s planning area that were consented for employment purposes in 2019-20, 2020-21 and 2021-22 (i.e. since the 2019 employment survey) have been listed on the survey results spreadsheet, although these sites were not surveyed. Such sites in the National Park area are not listed.
- 13.2 There were 36 consented planning applications, plus 2 listed building applications, for windfall employment sites during the period covering 2019-20, 2020-21 and 2021-22. The combined site area for these applications was 43,300 square metres (4.33 hectares). However, several sites attracted multiple applications, hence the quoted site area will include a significant multiple-counting element – and the true windfall site total will be lower. Included in the planning application total was one Discharge of Condition application and Non-Material Amendment application, these relating to earlier consents and thus contributing to the inflation of the actual windfall site total.

### 14 Spreadsheet of Results (Appendix A)

- 14.1 The spreadsheet of results is presented as Appendix A to this report.

### 15 Maps (Appendix B)

- 15.1 Maps have been prepared showing the site boundary of each of the employment sites listed in Appendix A. These are presented in a map document, which forms Appendix B to this report.
- 15.2 Maps have not been prepared for the small sites in the Council’s planning area (windfall employment sites of less than 5,000 m<sup>2</sup>).