



**Parc Cenedlaethol
Arfordir Penfro**

**Pembrokeshire Coast
National Park**

EMPLOYMENT SURVEY REPORT, 2017
March, 2018

PEMBROKESHIRE COUNTY COUNCIL

AND

PEMBROKESHIRE COAST NATIONAL PARK AUTHORITY

Contents

<i>Chapter</i>	<i>Title</i>	<i>Page</i>
1	Introduction	3
2	Methodology	3
3	Overview of changes 2013-2017 and summary of the 2017 results (where comparative data isn't available)	5
4	Area based results	8
5	Pembroke and Pembroke Dock area	11
6	Milford Haven and Waterston area	13
7	Haverfordwest and Merlins Bridge area	15
8	Fishguard and Goodwick area, including Sceddau and Trecwn	17
9	Neyland area	19
10	Narberth area	21
11	Other locations in the Council's planning area	23
12	National Park sites	25
13	Spreadsheet of results	28
14	Small sites – windfall employment sites of less than 5,000 sqm (0.5 hectares)	29
15	Maps	Separate Documents

1 Introduction

- 1.1 The Council carried out employment surveys on a bi-annual basis from 2003, to 2015, which increased to an annual survey from the 2015 surveys onwards. From 2016, sites in the Pembrokeshire Coast National Park have also been included.
- 1.2 For the 2015 survey, the methodology was comprehensively reviewed. The new approach has also been used for the 2016 and 2017 surveys. The purpose of the review was to bring survey work into conformity with the latest Welsh Government planning advice. In particular, it is a reflection of 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. This date coincides with the adoption date of the Council's Local Development Plan (LDP). National Park sites appear for the first time in 2016. For each survey year, the position set out is that for the 1st April in that year. The new 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 very closely relate to the B Class uses.

2 Methodology

- 2.1 The 2017 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 such sites, but includes 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 on the Development Sites SPG existing sites list.
 - The main employment sites in the 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 81 sites were surveyed in 2017, of which 74 were in the Council's planning area and 7 in the National Park. The information collected for each of these is:
- The site area
 - The site area in use
 - The vacant land (including buildings)
 - Buildings and enclosures 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 or A2 or for sui generis uses very closely related to the B class employment uses).
 - .
 - Buildings not in use
 - Vacant, undeveloped, land within each employment
 - Land used for infrastructure and landscaping or likely to be difficult to develop
 - *(This includes shared infrastructure such as roads and car parking. It also covers landscaped areas and land unlikely to be amenable for development, perhaps because of steep topography or poor access).*
 - An area-based break-down into the component land uses. The categories are use classes B1, B2, B8, A2 and 'Other'.
 - Sites within the Haven Waterway Enterprise Zone are identified.
 - For sites in the Council's planning area, planning application reference numbers are recorded for employment and non-employment planning permissions.

Where available historic information from 2013, 2015 and 2016 is also shown for comparison.

- 2.4 Area measurements are recorded in square metres. These can be converted into hectares by dividing by 10,000.
- 2.5 A results table recording the full results from the 2017 survey has been prepared (Annex A to this report).

3 Overview of changes 2013-2017 and summary of the 2017 results (where comparative data isn't available)

- 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 sqm (1137.37 hectares). This excludes National Park sites. This slightly increased, to 11,461,982 sqm (1146.20 hectares), in 2015 (this figure also excluding National Park sites). In 2016, the figure further increased, to 11,953,357 sqm (1195.34 hectares), plus 851,031 sqm in the National Park (85.10 hectares). For 2017, two additional sites and minor boundary changes to 4 sites brought the total to 11,999,135m² (1199.91 hectares), with the National Park area reducing to 840,545m² due to the refinement of the site boundaries.
- 3.2 The site area in use in 2013 was 9,448,700 sqm (944.87 hectares). This excludes National Park sites. This fell to 8,294,777 sqm (829.48 hectares) in 2015, which was mainly attributable to the closure of the Murco (Milford Haven) Refinery. The 2015 figure also excludes National Park sites. In 2016, the figure increased to 9,764,952 sqm (976.50 hectares), plus 810,220 sqm (81.02 hectares) in the National Park. A significant element of the 2016 increase relates to the return to use of part of the former Murco (Milford Haven) Refinery, which is now a petro-chemical storage facility for Puma Energy. In 2016, the figure increased to 9,837,488m² (983.75 hectares) and decreased in the National Park area to 805,145m² (80.51 hectares). The rise in site area in use is coming largely from new windfall sites as well as development of sites outside of the hub and rural town areas.
- 3.3 Vacant land (including buildings) in 2013 was 1,925,000 sqm (192.50 hectares). This excludes National Park sites. For 2015 and 2016, a comparison figure with that for 2013 is achieved by combining the vacant land excluding buildings figures with those for buildings not in use. In 2015, the former was 1,887,731 sqm (188.78 hectares) and the latter 1,279,474 sqm (127.95 hectares). The combined total is 3,167,205 sqm (316.72 hectares). These figures exclude National Park sites. In 2016, the vacant land excluding buildings figure increased to 2,007,283 sqm (200.73 hectares) but the buildings not in use figure reduced to 181,122 sqm. The combined total is 2,178, 185 sqm (217.82 hectares). To these figures can be added the National Park component, where the vacant land excluding buildings total is 40,149.14 sqm (4.01 hectares) and the buildings not in use figure is 661.39 sqm (0.07 hectares), giving a combined total of 40,810.53 sqm (4.08 hectares).

The substantial increase from 2013 to 2015 and subsequent decrease in 2016 is largely attributed to the closure of Murco (Milford Haven) as a petro-chemical refinery and the re-opening of the majority of the site as a petro-chemical storage facility.

For 2017, the vacant area (excluding buildings) reduced slightly to 1,995,262m² as did the vacant building area which dropped to 166,386m² giving a combined total of 2,161,648. The decrease in vacant area is largely attributed to sites outside of hub and rural towns, in particular the use of the former runway at

Carew Airfield, small businesses being established at Old Station Yard in Letterston, and the expansion of Parc Gwynfryn in Crymych and Station Industrial Estate in Johnston.

3.4 In 2017, 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 – 15.6%;
- Milford Haven and Waterston – 26.4%;
- Haverfordwest and Merlins Bridge – 21.4%;
- Fishguard, Goodwick, Sceddau and Trecwn – 17.2%;
- Neyland – 5.3%;
- Narberth – 0.7%;
- Other locations within the Council’s planning area – 11.9%; and
- National Park sites – 1.8%.

3.5 Buildings / enclosures in use for employment purposes in 2015 covered 5,382,386 sqm (538.24 hectares). Those in use for non-employment purposes covered 2,292,491 sqm (229.25 hectares). Much of the latter relates to uses closely related to those in the employment use classes (B1, B2 and B8), but which are considered to be sui generis (in a class of their own). These figures are for sites in the Council’s planning area only. In 2016, buildings / enclosures in use for employment purposes covered 6,994,808 sqm (699.48 hectares) in the Council’s planning area, plus 795,228 sqm (79.52 hectares) in the National Park. Also in 2016, buildings / enclosures in use for non-employment purposes covered 2,210,341 sqm in the Council’s planning area, plus 2,515 sqm (0.25 hectares) in the National Park. For 2017, the figure for the Council’s planning area dropped to 6,987,520 sqm (698.75 hectares) and 784,956 sqm (78.50 hectares) in the National Park area. The slight reduction in employment buildings / enclosures in both areas can be attributed to communal/customer car parks and roads being excluded as opposed to business’ vacating sites. In actual fact, more land in the Council’s planning area has been developed for employment use than the amount of land which has fallen out of use, whilst the situation in the National Park has remained stable.

3.6 Land used for infrastructure, landscaping or otherwise considered to be difficult to develop accounted for 619,900 sqm (61.99 hectares) in 2015. This figure is for sites in the Council’s planning area only. In 2016, this figure for PCC’s planning area is 559,800 sqm (55.98 hectares) and there is an additional 12,476 sqm (1.25 hectares) in the National Park. Land in this category is not included in the figures for vacant land excluding buildings or buildings not in use. In 2017, the figure for the Councils area rose to 594,885 sqm (59.49 hectares) and 24,329 sqm (2.43 hectares) in the National Park. As explained in

3.5, these figures have increased due to communal/customer car parks and more roads being included compared to the 2016 survey.

3.7 For land in use, the areas used for different land use classes were as follows in 2015 (these figures are for the Council's planning area only):

- Class B1 – 119,593 sqm (11.96 hectares) (1.56% of total);
- Class B2 – 3,662,725 sqm (366.27 hectares) (47.72% of total);
- Class B8 – 1,599,310 sqm (159.93 hectares) (20.84% of total);
- Class A2 – 758 sqm (0.08 hectares) (0.01% of total); and
- Other – 2,292,491 sqm (229.25 hectares) (29.87% of total).

The comparable figures for 2016 in the Council's planning area are as follows:

- Class B1 – 39,362 sqm (3.94 hectares) (0.43% of total);
- Class B2 – 2,594,071 sqm (259.41 hectares) (28.18% of total);
- Class B8 – 4,360,958 sqm (436.10 hectares) (47.37% of total);
- Class A2 – 418 sqm (0.04 hectares) (0.01% of total); and
- Other – 2,210,341 sqm (221.03 hectares) (24.01% of total).

For sites in the National Park, the figures for 2016 are as follows:

- Class B1 – 7,615.38 sqm (0.76 hectares) (0.95% of total);
- Class B2 – 781750.26 sqm (78.18 hectares) (97.99% of total);
- Class B8 – 5488.82 sqm (0.55 hectares) (0.69% of total);
- Class A2 – 373.75 sqm (0.04 hectares) (0.05% of total); and
- Other – 2515.16 sqm (0.25 hectares) (0.32% of total).

The comparable figures for 2017 in the Council's planning area are as follows:

- Class B1 – 54,272 sqm (3.94 hectares) (0.43% of total);
- Class B2 – 2,590,801 sqm (259.41 hectares) (28.18% of total);
- Class B8 – 4,340,918 sqm (436.10 hectares) (47.37% of total);
- Class A2 – 1,527 sqm (0.04 hectares) (0.01% of total); and
- Other – 2,253,095 sqm (221.03 hectares) (24.01% of total).

For sites in the National Park, the figures for 2017 are as follows:

- Class B1 – 616 sqm (0.062 hectares) (0.08% of total);
- Class B2 – 780508 sqm (78.05 hectares) (99.07% of total);
- Class B8 – 3832 sqm (0.38 hectares) (0.49% of total);
- Class A2 – 0 sqm (0 hectares) (0% of total); and
- Other – 2915 sqm (0.29 hectares) (0.37% of total).

3.8 The high percentages for B2, B8 and 'Other' uses in the Council's planning area, and for B2 uses in the National Park, are to a significant extent related to the concentration of major industrial sites along the Milford Haven Waterway.

4 Area-based results

4.1 Locations in the Pembroke Dock / Pembroke and Milford Haven / Waterston areas make the biggest contributions to site area totals. This is mainly because they include the major industrial sites adjoining the Milford Haven Waterway.

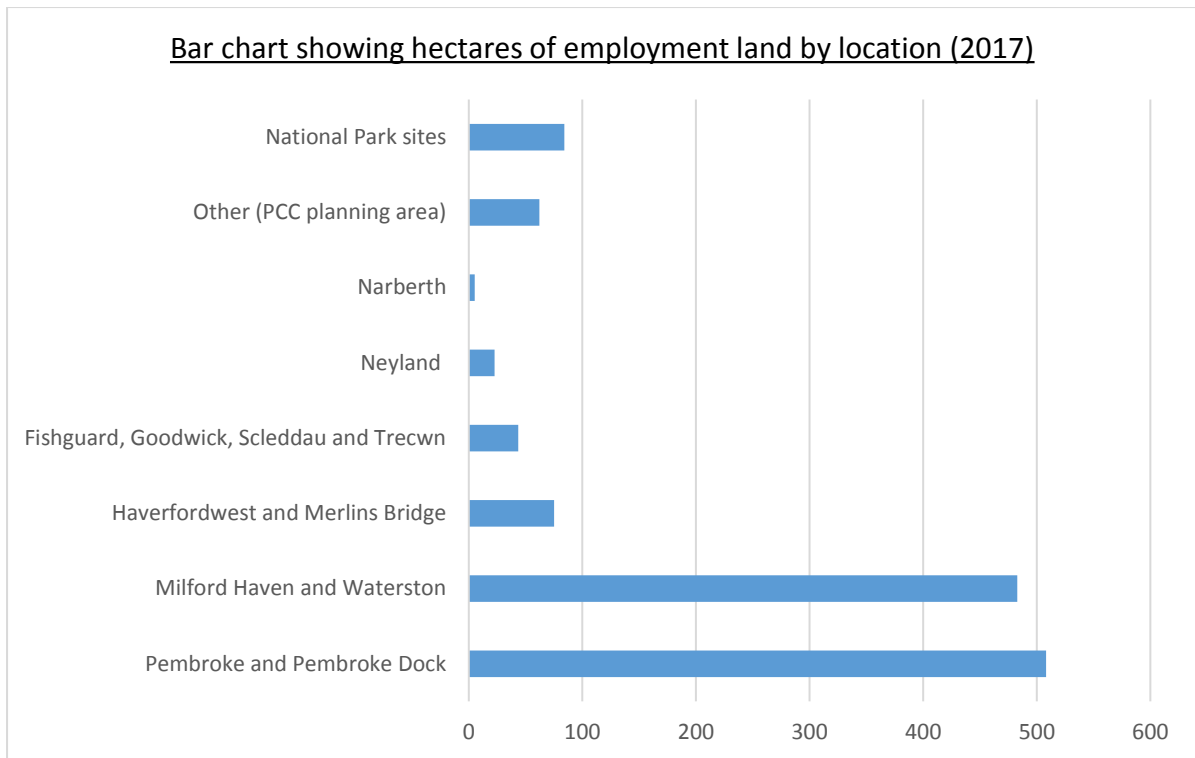
4.2 The table below presents this information for 2013, 2015, 2016 and 2017:

Table showing total area of employment land (developed and undeveloped), by location, in 2013, 2015 and 2016

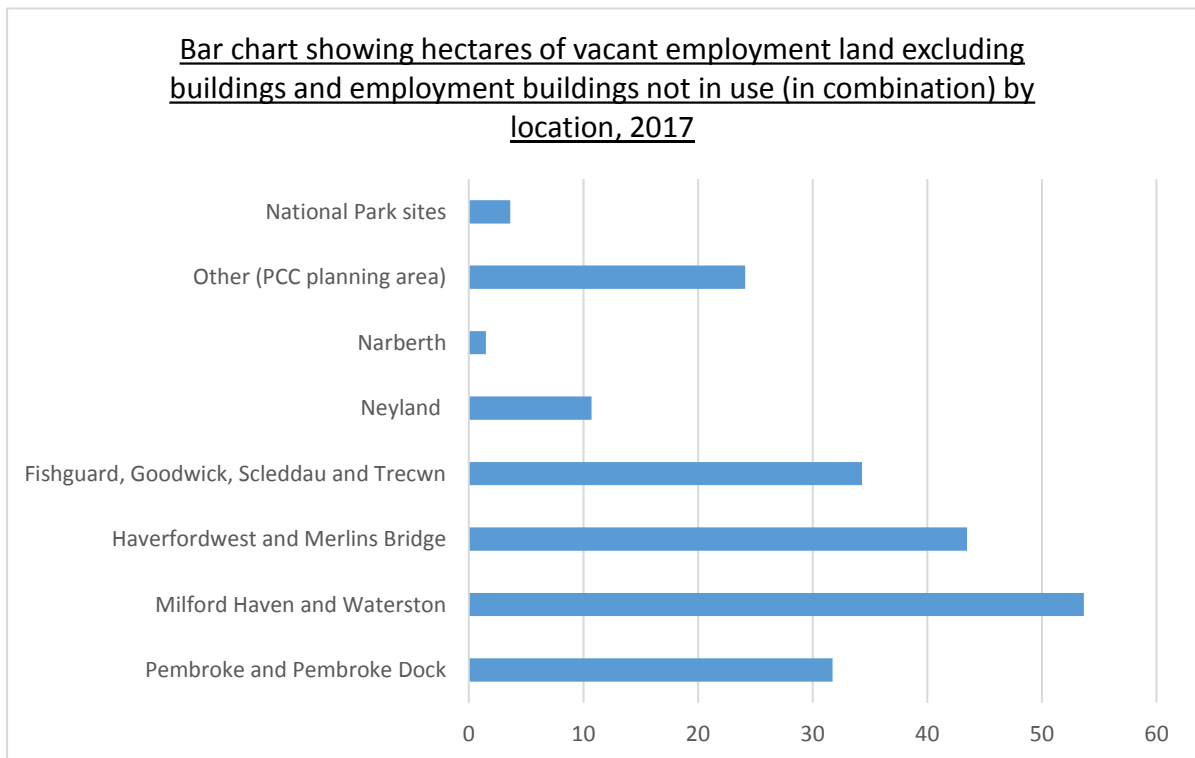
<u>Location</u>	<u>2013 total area (square metres)</u>	<u>2013 %</u>	<u>2015 total area (square metres)</u>	<u>2015 %</u>	<u>2016 total area (square metres)</u>	<u>2016 %</u>	<u>2017 total area (square metres)</u>	<u>2017 %</u>
Pembroke and Pembroke Dock area	5,027,100	44.20	5,027,090	43.86	5,076,930	39.64	5,081,630	39.58
Milford Haven and Waterston area	4,501,000	39.57	4,492,605	39.20	4,828,341	37.71	4,828,341	37.6
Haverfordwest and Merlins Bridge area	685,300	6.03	698,444	6.09	751,913	5.87	751,913	5.86
Fishguard and Goodwick area, including Scleddau and Trecwn	433,800	3.81	436,613	3.81	435,407	3.40	435,407	3.39
Neyland area	225,600	1.98	225,630	1.97	226,540	1.77	226,540	1.76
Narberth area	46,500	0.41	46,392	0.40	53,456	0.42	53,456	0.42
Other locations in the Council's planning area	454,400	4.00	535,188	4.67	580,770	4.54	621,848	4.84
National Park sites					851,031	6.65	840,545	6.55
Totals	11,373,700	100	11,461,982	100	12,804,388	100	12,839,680	100

(Note: the 2013 and 2015 % figures do not take account of National Park sites)

4.3 The total site areas have not changed significantly between the four survey dates. The introduction of National Park sites in 2016 has slightly reduced the percentage figures for Pembroke and Pembroke Dock and Milford Haven and Waterston, but these areas still dominate the provision. National Park sites account for just over 6½% of the total. The only significant increase is in sites outside of the main town areas, which included Princes Gate bottling plant and the former Pentlepoir School as new sites for 2017.



4.4 Most of the major industrial installations of the Haven Waterway are located here. Part of the South Hook LNG facility is within the National Park and this is the main element of employment land provision in the National Park.



4.5 Milford Haven and Waterston have the greatest supply of vacant land and buildings. However, this has reduced significantly from 2016 due to part of the Murco (Milford Haven) Refinery Site coming back into use.

5 Pembroke and Pembroke Dock area

Total Site Area

	Square metres	Hectares
2013	5,027,100	502.71
2015	5,027,090	502.71
Change between 2013 and 2015	-10	0
2016	5,076,930	507.69
Change between 2015 and 2016	+49,840	+4.98
2017	5,081,630	508.16
Change between 2016 and 2017	+4,700	+0.47

Site Area in Use

	Square metres	Hectares
2013	4,644,200	464.42
2015	4,718,546	471.85
Change between 2013 and 2015	+74,346	+7.43
2016	4,741,374	474.14
Change between 2015 and 2016	+22,828	+2.28
2017	4,751,406	475.14
Change between 2016 and 2017	+10,032	+1

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	382,900	38.29
2015 vacant area excluding buildings	288,296	28.83
2015 buildings not in use	20,248	2.02
Change in vacant land and not-in-use buildings between 2013 and 2015	-74,356	-7.44
2016 vacant area excluding buildings	317,236	31.72
2016 buildings not in use	18,320	1.83
Change in vacant land and not-in-use buildings between 2015 and 2016	+27,012	+2.70
2017 vacant area excluding buildings	317,439	31.74
2017 buildings not in use	12,785	1.28
Change in vacant land and not-in-use buildings between 2016 and 2017	-5,332	-0.53

5.1 The table above indicates a 7.43 hectare increase in the amount of land in use for employment purposes between 2013 and 2015, a further increase of 2.28 hectares between 2015 and 2016 and 1 hectare between 2016 and 2017. There was also a 7.44 hectare reduction in vacant land and buildings not-in-use between 2013 and 2015, followed by an increase of 2.70 hectares between 2015 and 2016 and a decrease of 0.53 of a hectare between 2016 and 2017.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	5,081,630	508.16
Buildings / enclosures in use for employment purposes	2,446,621	244.66 (48.15% of total)
Buildings / enclosures in use for other purposes	2,129,484	212.94 (41.9% of total)
Buildings not in use	12,785	1.27 (0.25% of total)
Vacant, undeveloped	317,439	31.74 (6.25% of total)
Infrastructure, landscaping and difficult to develop land	176,605	17.66 (3.48% of total)

5.2 The table above demonstrates that about 48% of the available land was in use for employment purposes. Approximately 42% was in use for other purposes. This mainly reflects the classification of the 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 over 6% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 3% of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	2,446,621	244.66
B1	23,602	2.36 (0.96% of total)
B2	1,200,640	120.06 (49.07% of total)
B8	1,222,217	122.22 (49.96% of total)
A2	162	0.02 (0.01% of total)

5.3 The table above confirms that the vast majority of in-use employment land in the Pembroke / Pembroke Dock area is in classes B2 (general industrial) and B8 (distribution and storage).

5.4 Of the 9 sites surveyed in 2017, 3 included land being advertised for sale.

6 Milford Haven and Waterston area

Total Site Area

	Square metres	Hectares
2013	4,501,000	450.10
2015	4,492,625	449.26
Change in total site area between 2013 and 2015	- 8,375	- 0.84
2016	4,828,341	482.83
Change in total site area between 2015 and 2016	+335,716	+33.57
2017	4,828,341	482.83
Change in total site area between 2016 and 2017	+0	+0

Site Area in Use

	Square metres	Hectares
2013	3,984,800	398.48
2015	2,719,948	271.99
Change in site area in use between 2013 and 2015	-1,264,852	-126.49
2016	4,184,740	418.47
Change in site area in use between 2015 and 2016	+1,464,792	+146.47
2017	4,177,708	417.77
Change in site area in use between 2016 and 2017	-7,032	-0.7

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	516,200	51.62
2015 vacant area excluding buildings	528,937	52.89
2015 buildings not in use	1,243,740	124.37
Change in vacant land and not-in-use buildings between 2013 and 2015	+1,256,477	+125.65
2016 vacant area excluding buildings	525,460	52.55
2016 buildings not in use	118,141	11.81
Change in vacant land and not-in-use buildings between 2015 and 2016	-1,129,076	-112.91
2017 vacant area excluding buildings	536,577	53.66
2017 buildings not in use	114,056	11.41
Change in vacant land and not-in-use buildings between 2016 and 2017	+7,032	+0.7

6.1 The table above indicates a significant reduction in the amount of land in use for employment purposes between 2013 and 2015, followed by a substantial increase between 2015 and 2016. There was a consequential increase in vacant land and buildings not-in-use between 2013 and 2015, followed by a reduction between 2015 and 2016. These changes were primarily a consequence of the closure of the Milford Haven (Murco) Refinery and the subsequent re-use of a substantial proportion of the site for petro-chemical storage purposes by Puma Energy. For 2017, the figures have remained stable compared with the changes taking place in 2015 and 2016 apart from Waterston Industrial Estate, which accounted for the majority of the increase in vacancy.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	4,828,341	482.83
Buildings / enclosures in use for employment purposes	4,038,636	403.86 (83.64% of total)
Buildings / enclosures in use for other purposes	32,073	3.20 (0.66% of total)
Buildings not in use	114,056	11.41 (2.36% of total)
Vacant, undeveloped	536,577	53.66 (11.11% of total)
Infrastructure, landscaping and difficult to develop land	106,999	10.69 (2.65% of total)

6.2 The table above demonstrates that slightly more than 83% of the available land was in use for employment purposes. Less than 1% was in use for other purposes. Buildings not in use represent slightly less than 2½% of the total. Vacant, undeveloped land accounted for slightly below 11% of the total. Infrastructure, landscaping and 'difficult to develop' land accounted for just over 2½% of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	4,038,636	401.97
B1	10,267	1.03 (0.25% of total)
B2	1,245,937	124.59 (30.85% of total)
B8	2,782,139	278.21 (68.89% of total)
A2	293	0.03 (0.01% of total)

6.3 The table above confirms that most in-use employment land in the Milford Haven / Waterston area is in classes B2 (general industrial) and B8 (distribution and storage). The B8 uses now dominate, contributing just under 69% of the total.

6.4 Of the 12 sites surveyed in 2017, 4 included land being advertised for sale.

7 Haverfordwest and Merlins Bridge area

Total Site Area

	Square metres	Hectares
2013	685,300	68.53
2015	698,444	69.84
Change in total site area between 2013 and 2015	+13,144	+1.31
2016	751,913	75.19
Change in total site area between 2015 and 2016	+53,469	+5.35
2017	751,913	75.19
Change in total site area between 2016 and 2017	+0	+0

Site Area in Use

	Square metres	Hectares
2013	260,700	26.07
2015	279,696	27.97
Change in site area in use between 2013 and 2015	+18,996	+1.90
2016	308,952	30.90
Change in site area in use between 2015 and 2016	+29,256	+2.93
2017	314,099	31.41
Change in site area in use between 2016 and 2017	+5,147	+0.51

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	424,600	42.46
2015 vacant area excluding buildings	416,351	41.64
2015 buildings not in use	2,397	0.24
Change in vacant land and not-in-use buildings between 2013 and 2015	-5,852	-0.59
2016 vacant area excluding buildings	437,318	43.73
2016 buildings not in use	5,843	0.58
Change in vacant land and not-in-use buildings between 2015 and 2016	+24,413	+2.44
2017 vacant area excluding buildings	434,774	43.48
2017 buildings not in use	3,040	0.3
Change in vacant land and not-in-use buildings between 2016 and 2017	-5,347	-0.53

7.1 The table above indicates slight increases in the amount of land in use for employment purposes between 2013/2015, 2015/2016 and 2016/2017. There was a slight reduction in vacant land and buildings not-in-use between 2013 and 2015, followed by a modest increase between 2015 and 2016 and a slight decrease between 2016 and 2017.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	751,913	75.19
Buildings / enclosures in use for employment purposes	175,715	17.57 (23.37% of total)
Buildings / enclosures in use for other purposes	42,773	4.28 (5.69% of total)
Buildings not in use	3,040	0.3 (0.40% of total)
Vacant, undeveloped	434,774	43.47 (57.82% of total)
Infrastructure, landscaping and difficult to develop land	94,159	9.42 (12.52% of total)

7.2 The table above demonstrates that slightly more than 23% of the available land was in use for employment purposes. Just below 6% was in use for other purposes. Buildings not in use represented an insignificant proportion of the total, while 58% of the available land was vacant and undeveloped. However, overall land areas involved are much smaller than, for example, in Milford Haven. The vacant and undeveloped land in Haverfordwest and Merlins Bridge totals 43.47 hectares. This compares with 53.66 hectares in Milford Haven and Waterston (just above 11% of the total site area for those settlements). Infrastructure, landscaping and 'difficult to develop' land made up 12.5% of the total, a significant increase on 2016 due to internal roads and customer parking being discounted from the employment figures. When this is taken into account, the Haverfordwest and Merlin's Bridge area has seen a net increase in the total amount of land developed for employment, particularly along in the Withybush Road sites.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	175,715	17.57
B1	8,461	0.85 (4.82% of total)
B2	56,231	5.62 (32% of total)
B8	111,023	11.1 (63.18% of total)
A2	0	0

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). B8 uses now dominate, accounting for slightly less than 63% of the total.

7.4 Of the 14 sites surveyed in 2017, 6 included land being advertised for sale.

8 Fishguard and Goodwick, including Sledddau and Trecwn, area

Total Site Area

	Square metres	Hectares
2013	433,800	43.38
2015	436,613	43.66
Change in total site area between 2013 and 2015	+2,813	+0.28
2016	435,407	43.54
Change in total site area between 2015 and 2016	-1,206	-0.12
2017	435,407	43.54
Change in total site area between 2016 and 2017	+0	+0

Site Area in Use

	Square metres	Hectares
2013	146,700	14.67
2015	92,070	9.21
Change in site area in use between 2013 and 2015	-54,630	-5.46
2016	72,190	7.22
Change in site area in use between 2015 and 2016	-19,880	-1.99
2017	70,268	7.03
Change in site area in use between 2016 and 2017	-1,922	-0.19

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	287,100	28.71
2015 vacant area excluding buildings	341,865	34.19
2015 buildings not in use	2,678	0.27
Change in vacant land and not-in-use buildings between 2013 and 2015	+57,443	+5.74
2016 vacant area excluding buildings	341,200	34.12
2016 buildings not in use	22,017	2.20
Change in vacant land and not-in-use buildings between 2015 and 2016	+18,674	+1.87
2017 vacant area excluding buildings	343,070	34.31
2017 buildings not in use	22,069	2.21
Change in vacant land and not-in-use buildings between 2016 and 2017	+1,922	+0.19

8.1 The table above indicates a 5.46 hectare reduction in the amount of land in use for employment purposes between 2013 and 2015. It also shows a further reduction of 1.99 hectares between 2015 and 2016. There were increases, of broadly similar proportions, in vacant land and buildings not-in-use over the same time periods. In 2017, the total amount of land available for employment has remained the same as 2016, with a slight reduction in the amount of land in use and an increase in vacant area mainly in Goodwick Industrial Estate.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	435,407	43.54
Buildings / enclosures in use for employment purposes	41,002	4.1 (9.42% of total)
Buildings / enclosures in use for other purposes	5,954	0.6 (1.37% of total)
Buildings not in use	22,069	2.21 (5.05% of total)
Vacant, undeveloped	343,070	34.31 (78.36% of total)
Infrastructure, landscaping and difficult to develop land	20,008	2 (4.60% of total)

8.2 The table above demonstrates that slightly less than 10% of the available land was in use for employment purposes. A further 1.37% was in use for other purposes. This indicates a low proportion of the available land being in use at the survey date. Buildings not in use represented about 5% of the total. Vacant, undeveloped land accounted for just over 78% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 4.5% of the total. The amount of land attributed to infrastructure and landscaping has increased and the amount of land in employment use has decreased when compared to 2016 because communal car parking is now included in the infrastructure category instead of employment.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	41,002	4.1
B1	1,576	0.16 (3.84% of total)
B2	2,723	0.27 (6.64% of total)
B8	35,762	3.58 (87.22% of total)
A2	941	0.09 (2.30% of total)

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). B8 uses account for slightly more than 87% of the total, with just over 6.5% being in use class B2 (general industrial).

8.4 Of the 8 sites surveyed in 2017, 4 included land being advertised for sale.

9 Neyland area

Total Site Area

	Square metres	Hectares
2013	225,600	22.56
2015	225,630	22.56
Change in total site area between 2013 and 2015	+30	0
2016	226,540	22.65
Change in total site area between 2015 and 2016	+910	+0.09
2017	226,540	22.65
Change in total site area between 2016 and 2017	+0	+0

Site Area in Use

	Square metres	Hectares
2013	123,200	12.32
2015	113,593	11.36
Change in site area in use between 2013 and 2015	-9,607	-0.96
2016	115,186	11.52
Change in site area in use between 2015 and 2016	+1,593	+0.16
2017	113,905	11.39
Change in site area in use between 2016 and 2017	-1,281	-0.13

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	102,400	10.24
2015 vacant area excluding buildings	109,192	10.92
2015 buildings not in use	2,845	0.28
Change in vacant land and not-in-use buildings between 2013 and 2015	+9,637	+0.96
2016 vacant area excluding buildings	102,764	10.28
2016 buildings not in use	8,590	0.86
Change in vacant land and not-in-use buildings between 2015 and 2016	+7,907	+0.79
2017 vacant area excluding buildings	107,220	10.72
2017 buildings not in use	5,415	0.54
Change in vacant land and not-in-use buildings between 2016 and 2017	+1,281	+0.12

9.1 The table above indicates a modest reduction in the amount of land in use for employment purposes between 2013 and 2015. It also shows a very small increase in this amount between 2015 and 2016, and a slight decrease again in 2017. There was also a slight increase in vacant land and buildings not-in-use, for all surveyed years.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	226,540	22.65
Buildings / enclosures in use for employment purposes	51,910	5.19 (22.91% of total)
Buildings / enclosures in use for other purposes	12,984	1.3 (5.73% of total)
Buildings not in use	5,415	0.54 (2.39% of total)
Vacant, undeveloped	107,220	10.72 (47.33% of total)
Infrastructure, landscaping and difficult to develop land	49,011	4.9 (21.63% of total)

9.2 The table above demonstrates that just under 23% of the available land was in use for employment purposes. Less than 6% was in use for other purposes. Buildings not in use represented just over 2% the total. Vacant, undeveloped land accounted for slightly over 47% of the total, although the total land area involved is modest, at only 10.72ha. Infrastructure, landscaping and 'difficult to develop' land made up slightly less than 22% of the total. The land in employment use has increased by nearly 50% from the figures from 2016, but this is largely because of land considered integral to the functioning of the business being reclassified from infrastructure to employment. There was also a decrease in the building not in use due to the use of internal data from the council's property department, which gave a more accurate account of the buildings, which were vacant at the time of survey.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	51,910	3.69
B1	4,609	0.46 (8.88% of total)
B2	17,689	1.77 (34.08% of total)
B8	29,612	2.96 (57.04% of total)
A2	0	0

9.3 The table above confirms that more than half of the in-use employment land in the Neyland area is in class B8 (distribution and storage). Of the remainder, 34% is in use class B2 (general industrial) and slightly less than 9% in use class B1 (offices, research and development and light industry).

9.4 Of the 3 sites surveyed in 2016, 2 included land being advertised for sale.

10 Narberth area

Total Site Area

	Square metres	Hectares
2013	46,500	4.65
2015	46,392	4.64
Change in total site area between 2013 and 2015	-108	-0.01
2016	53,456	5.35
Change in total site area between 2015 and 2016	+7,064	+0.71
2017	53,456	5.35
Change in total site area between 2016 and 2017	+0	+0

Site Area in Use

	Square metres	Hectares
2013	31,400	3.14
2015	30,238	3.02
Change in site area in use between 2013 and 2015	-1,162	-0.12
2016	38,070	3.81
Change in site area in use between 2015 and 2016	+7,832	+0.78
2017	38,425	3.84
Change in site area in use between 2016 and 2017	+355	+0.03

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	15,100	1.51
2015 vacant area excluding buildings	15,750	1.58
2015 buildings not in use	405	0.04
Change in vacant land and not-in-use buildings between 2013 and 2015	+1,055	+0.11
2016 vacant area excluding buildings	15,251	1.53
2016 buildings not in use	134	0.01
Change in vacant land and not-in-use buildings between 2015 and 2016	-770	-0.08
2017 vacant area excluding buildings	15,031	1.5
2017 buildings not in use	0	0
Change in vacant land and not-in-use buildings between 2016 and 2017	-354	-0.04

10.1 The table above indicates a slight reduction in the amount of land in use for employment purposes between 2013 and 2015. This was followed by a larger increase in this amount between 2015 and 2016. There was a small increase in vacant land and buildings not-in-use between 2013 and 2015. However, between 2015 and 2016, there was a slight reduction in this amount, which has also been the case for 2017. When compared with the other areas in paragraph's 5 to 9, Narberth has remained very stable for the above indicators.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	53,456	5.35
Buildings / enclosures in use for employment purposes	22,145	2.21 (41.43% of total)
Buildings / enclosures in use for other purposes	5,095	0.51 (9.53% of total)
Buildings not in use	0	0
Vacant, undeveloped	15,031	1.50 (28.12% of total)
Infrastructure, landscaping and difficult to develop land	11,185	1.12 (20.92% of total)

10.2 The table above demonstrates that just over 41% of the available land was in use for employment purposes. Slightly more than 9.5% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for slightly more than 28% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just under 21% of the total. At the time of survey, the road layout for Rushacre Enterprise Park extension was under construction, which will significantly reduce the vacant undeveloped figure for Narberth once the development is complete.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	22,145	2.21
B1	0	0
B2	10,385	1.04 (46.9% of total)
B8	11,760	1.18 (53.1% of total)
A2	0	0

10.3 The table above confirms that just over 53% of in-use employment land in the Narberth area is in use class B8 (distribution and storage). A further 47% is in use class B2 (general industrial).

10.4 Of the 4 sites surveyed in 2017, none included land being advertised for sale.

11 Other locations in the Council's planning area

Total Site Area

	Square metres	Hectares
2013	454,400	45.44
2015	535,188	53.52
Change in total site area between 2013 and 2015	+80,788	+8.08
2016	580,770	58.08
Change in total site area between 2015 and 2016	+45,582	+4.56
2017	621,848	62.18
Change in total site area between 2016 and 2017	+41,078	+4.1

Site Area in Use

	Square metres	Hectares
2013	257,700	25.77
2015	340,688	34.07
Change in site area in use between 2013 and 2015	+82,988	+8.30
2016	304,439	30.44
Change in site area in use between 2015 and 2016	-36,249	-3.62
2017	371,677	37.17
Change in site area in use between 2016 and 2017	+67,238	+6.73

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2013 vacant area including buildings	196,700	19.67
2015 vacant area excluding buildings	187,340	18.73
2015 buildings not in use	7,160	0.72
Change in vacant land and not-in-use buildings between 2013 and 2015	-2,200	-0.22
2016 vacant area excluding buildings	268,054	26.81
2016 buildings not in use	8,277	0.83
Change in vacant land and not-in-use buildings between 2015 and 2016	+81,831	+8.18
2017 vacant area excluding buildings	241,150	24.12
2017 buildings not in use	9,021	0.9
Change in vacant land and not-in-use buildings between 2016 and 2017	-26,160	-2.62

11.1 The table above indicates an increase in overall site area of just over 8 hectares between 2013 and 2015, a further increase of just over 4 ½ hectares between 2015 and 2016, and a further increase of 4 hectares between 2016 and 2017. There was also an increase of just over 8 hectares in the amount of site area in use between 2013 and 2015, followed by a fall in this amount of just over 3 ½ hectares between 2015 and 2016 and an increase of just under 7 hectares between 2016 and 2017. There was a very small reduction, of 0.22 hectares, in vacant land and buildings not-in-use between 2013 and 2015, but an increase of just over 8 hectares in this amount between 2015 and 2016.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	621,848	58.08
Buildings / enclosures in use for employment purposes	211,491	21.14 (34.01% of total)
Buildings / enclosures in use for other purposes	24,932	2.49 (4.01% of total)
Buildings not in use	9,021	0.9 (1.45% of total)
Vacant, undeveloped	241,150	24.11 (38.78% of total)
Infrastructure, landscaping and difficult to develop land	136,918	13.69 (22.02% of total)

11.2 The table above demonstrates that 34% the available land was in use for employment purposes. A further 4% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just over 38% of the total. Infrastructure, landscaping and 'difficult to develop' land made up 22% of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	211,491	21.15
B1	5,759	0.58 (2.72% of total)
B2	57,196	5.72 (27.04% of total)
B8	148,405	14.84 (70.17% of total)
A2	131	0.01 (0.06% of total)

11.3 The table above confirms that most in-use employment land in these areas are in classes B2 (general industrial) and B8 (distribution and storage). B2 use classes account for 27% of the total in use employment land. B8 use classes account for just over 70% of the total in use employment land.

11.4 Of the 24 sites surveyed in 2016, 2 included land being advertised for sale.

12 National Park sites

Total Site Area

	Square metres	Hectares
2016	851,031	85.10
2017	840,545	84.05
Change in total site area between 2016 and 2017	-10,486	-1.05

Site Area in Use

	Square metres	Hectares
2016	810,220	81.02
2017	805,145	80.51
Change in site area in use between 2016 and 2017	-5,075	-0.51

Vacant Area (including buildings in 2013 and split thereafter)

	Square metres	Hectares
2016 vacant area excluding buildings	40,149	4.01
2016 buildings not in use	662	0.07
2017 vacant area excluding buildings	36,100	3.61
2017 buildings not in use	726	0.07
Change in vacant land and not-in-use buildings between 2016 and 2017	-3,985	-0.4

- 12.1 Sites in Pembrokeshire Coast National Park were included for the first time in 2016 and with a subsequent survey in 2017; it is now possible to analyse the data.
- 12.2 The table shows an overall decrease in total site area of just over a hectare between 2016 and 2017 due the Salterns East and North being separated into The Green and Salterns East in order to exclude the B4318 Marsh Road. The site area in use between 2016 and 2017 has fallen by ½ a hectare due to Millard Park, St David's being incorrectly recorded as developed and in use in 2016 when in actual fact work had not yet commenced on site. The total vacant area and buildings not in use has reduced by nearly ½ a hectare, even though Millard Park has been re-categorised as vacant undeveloped in 2017.

Table showing proportions of the total site area within different use and non-use categories, 2017

	Square metres	Hectares
2017 total site area	840,545	84.05
Buildings / enclosures in use for employment purposes	784,956	78.5 (93.39% of total)
Buildings / enclosures in use for other purposes	2,915	0.29 (0.35% of total)
Buildings not in use	726	0.07 (0.09% of total)
Vacant, undeveloped	36,100	4.29 (4.29% of total)
Infrastructure, landscaping and difficult to develop land	24,329	2.43 (2.89% of total)

12.2 The table above demonstrates that just over 93% of the available land was in use for employment purposes. Vacant, undeveloped land accounted for slightly less than 5% of the total. Land in use for other purposes and buildings not in use accounted for insignificant proportions of the total. Infrastructure, landscaping and 'difficult to develop' land represented just under 3% of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2017

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2017	784,956	78.5
B1	616	0.06 (0.08% of total)
B2	780,508	78.05 (99.07% of total)
B8	3,832	0.38 (0.49% of total)
A2	0	0

12.3 The table above confirms that most in-use employment land in the National Park is in class B2 (general industrial). This is because the South Hook LNG site dominates provision. Other use classes make minimal contributions in comparison with the B2 uses, but nonetheless are important in a local context.

12.4 Of the 6 sites surveyed in 2016, 1 included land being advertised for sale.

13 Small sites – windfall employment sites of less than 5,000 square metres (0.5 hectares)

- 13.1 Small sites within the Council's planning area have been recorded on the spreadsheet (Annex A), although these were not surveyed. Such sites in the National Park are not listed.
- 13.2 There were 44 consented planning applications (plus 1 listed building application) for windfall employment sites within this category between LDP adoption in February 2013 and the end of March 2015. The combined site area for these applications was 38,600 square metres (3.86 hectares). A few sites attracted more than one such application, hence, the contribution made to the employment land bank will be slightly less than the quoted figure.
- 13.3 There were a further 20 consented planning applications (plus 1 listed building application, 1 certificate of lawful use application and 2 applications for non-material changes to earlier applications) for windfall employment sites within this category between the start of April 2015 and the end of March 2016. The combined site area for these applications was 28,000 square metres (2.8 hectares). As for the 2013-15 figures, there is likelihood of some double counting, so the contribution to the employment land bank will be slightly less than the quoted figure.
- 13.4 Another 21 planning applications (plus 1 listed building application) for windfall employment sites within this category were granted between the start of April 2016 and the end of March 2017. The combined site area for these applications was 20,800 square metres (2.08 hectares). As for the 2013-16 figures, there is likelihood of some double counting, so the contribution to the employment land bank will be slightly less than the quoted figure.

14 Spreadsheet of Results

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

15 Maps

- 15.1 Maps have been prepared showing the site boundary of each of the employment sites listed in Annex A. These are presented in a map document, which forms Annex B to this report.
- 15.2 Maps have not been prepared for the small sites (windfall employment sites of less than 5,000 square metres).

Small site applications (windfall sites under 5000 sq.m.) 2015			Small site applications (windfall sites under 5000 sq.m.) 2016			Small site applications (windfall sites under 5000 sq.m.) 2017		
Reference Number	Site area (sq.m.) rounded to nearest 100	Notes	Reference Number	Site area (sq.m.) rounded to nearest 100	Notes	Reference Number	Site area (sq.m.) rounded to nearest 100	Notes
12/0688/PA	800		11/1102/PA	4100		15/1157/PA	800	
12/0919/PA	600		14/0992/PA	100		15/0704/PA	1700	
12/0943/PA	1800		14/1002/PA	200		15/1245/PA	2400	
12/1080/PA	500		14/1076/PA	400		15/1306/PA	400	Change of use all B1 to part B1 and part A1
12/1099/PA	3800		14/1110/PA	3400		15/1304/PA	400	
12/1127/PA	300		14/1203/PA	3200		15/1333/PA	2400	
12/1135/PA	2000		15/0092/PA	100		15/1319/PA	100	
12/1164/PA	1500		15/0180/PA	200		16/0199/PA	100	
12/1172/PA	1000		15/0181/CL	2000		16/0245/PA	1100	
12/1195/CL	900		15/0183/PA	300		16/0298/PA	3400	
13/0015/PA	200		15/0291/PA	400		16/0466/PA	100	
13/0055/PA	1500		15/0441/PA	4600		16/0564/PA	200	
13/0061/PA	1700		15/0458/NM	100		16/0558/PA	800	48% employment
13/0079/PA	300		15/0462/NM	2100		16/0450/PA	100	
13/0099/PA	300		15/0474/PA	1500		16/0528/PA	1200	
13/0207/PA	3100		15/0551/PA	900		16/0606/PA	200	
13/0261/PA	200		15/0665/PA	500		16/0607/LB	200	
13/0324/PA	100		15/0667/PA	900		16/0695/PA	1200	
13/0374/PA	1000		15/0675/PA	1000		16/0765/PA	100	
13/0400/PA	600		15/0722/PA	1400		16/0544/PA	3600	
13/0429/PA	800	Site area is for employment element only	15/0824/PA	100		16/0810/PA	200	
13/0479/LB	300		15/0862/PA	100		16/0897/PA	100	
13/0593/PA	700		15/0863/LB	100		Total	20800	
13/0600/PA	1600		15/1088/PA	300				
13/0617/PA	200		Total	28000				
13/0789/PA	300							
13/0811/PA	300							
13/0922/PA	600							
13/0979/PA	100							
13/1086/PA	100							
13/1108/PA	3200							
14/0052/PA	3600							
14/0114/PA	400							
14/0190/PA	100							
14/0301/PA	100							
14/0368/PA	500							
14/0386/PA	200							
14/0464/PA	1400							
14/0473/PA	100							
14/0492/PA	400							
14/0506/PA	100							
14/0798/PA	400							
14/0931/PA	400							
14/0982/PA	400							
14/1050/PA	100							
Total	38600							